



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Authorization/Subscription Utility (ASU)

Clinical Coordinator Manual

Version 1.0
November 2004

Information Technology Support Center
Division of Information Resources
Albuquerque, New Mexico

PREFACE

The Authorization/Subscription Utility (ASU) component of the IHS Resource and Patient Management System (RPMS) provides Indian Health Service/Tribal/Urban (I/T/U) healthcare providers with the ability to define User Classes that determine access levels to information within Text Integration Utilities (TIU).

This manual contains a description of the ASU package and all of the ASU options. A glossary, index, and appendices are located at the end of this manual and contain additional information and guidance for the user. The appendices contain lists of the pre-defined User Classes and business rules exported with TIU/ASU.

TABLE OF CONTENTS

1.0	INTRODUCTION.....	1
1.1	Features and Benefits.....	1
1.2	General Implementation Guidelines.....	2
2.0	ABOUT USER CLASSES.....	3
2.1	Populating Pre-Defined User Classes.....	3
2.2	Creating User Classes.....	3
2.3	Creating User Subclasses.....	6
2.4	Modifying User Classes.....	8
2.4.1	Removing Subclasses from User Classes.....	9
2.5	Viewing User Classes and Subclasses.....	11
3.0	REVIEWING USER CLASS MEMBERSHIP.....	12
3.1	List Membership by User.....	12
3.1.1	Adding Individuals to User Class Membership.....	12
3.1.2	Removing Individuals from User Class Membership.....	13
3.1.3	Editing Individual Class Memberships.....	13
3.2	List Membership by Class.....	14
3.2.1	Adding Members to User Classes.....	14
3.2.2	Removing Members from User Classes.....	15
3.2.3	Editing Individual Class Memberships.....	15
3.2.4	Scheduling Class Membership Changes.....	15
4.0	ABOUT BUSINESS RULES.....	17
4.1	About Pre-Defined Business Rules.....	17
4.2	Creating Business Rules.....	17
4.3	Modifying Business Rules.....	19
4.4	Deleting Business Rules.....	19
5.0	TROUBLESHOOTING.....	20
5.1.1	Relationship between User Class File and Person Class File.....	20
6.0	GLOSSARY.....	22
7.0	APPENDIX A: PRE-DEFINED USER CLASSES.....	23
8.0	APPENDIX B: EXPORTED BUSINESS RULES.....	27
8.1	Business Rules for Clinical Documents.....	27
8.2	Business Rules for Progress Notes.....	31
8.3	Business Rules for Discharge Summaries.....	32
9.0	INDEX.....	34
10.0	CONTACT INFORMATION.....	36

1.0 Introduction

The Authorization/Subscription Utility (ASU) allows you to define user roles within TIU. These user roles can then be used to restrict access to certain document actions such as creating, editing, and deleting.

Site Managers can use ASU to create different *User Classes* associated with the job functions at their facilities. For instance, hospital facilities might create User Classes such as Nurse, Physical Therapist, and Provider. After creating classes, Facility Managers can assign personnel to the appropriate class(s). Additionally, Facility Managers might want to create *subclasses* that further classify job functions. For instance, Dental Intern and Dental Resident might be subclasses of the Dentist User Class.

Note: You can assign personnel to multiple classes as needed.

After assigning all personnel to the appropriate User Class and/or subclass, Site Managers can design *business rules* that restrict access to certain documentation functions. Use these rules to determine which User Class/subclass can perform specific functions within documents. For example, you might want to create a rule that dictates that only a member of the Physician or Clinical Service Chief groups can edit a progress note.

ASU also includes functionality that recognizes *user roles*, such as Author, Transcriber, and Expected Signer. Facility Managers can use these roles to further define business rules. For example, you might want to create a rule that allows members of the Student User Class to edit only those progress notes that they create (author).

1.1 Features and Benefits

- ASU lets you use pre-defined User Classes, user roles, and business rules to get started.
- ASU lets you define and populate User Classes based on personnel levels at your facility. Additionally, ASU lets you retrieve information about those classes and edit information within them.
- ASU lets you place members in as many classes as necessary.
- ASU lets you schedule transitions of members between classes. For instance, you can automatically set the members of one Resident group to join another group on the day they are scheduled to rotate.
- ASU lets you create a User Class Hierarchy that is appropriate to your facility, with no maximum limitations or minimum requirements.

1.2 General Implementation Guidelines

To ensure immediate success, you should implement ASU in the least restrictive manner possible to limit maintenance demands and internal confusion. The following list of guidelines includes information that will help you make the right implementation decisions from the beginning.

- **Users should be included in the most specific member class available.** When members are included in a subclass, such as Dentists, they automatically receive the permissions granted to the associated primary classes, such as providers.
- **Distribute as much of the workload for identifying group membership as possible.** If applicable, the Administrative Officers and Service Chiefs at your facility can probably direct you to the people in their departments who are already maintaining personnel rosters. These are the ideal people to assist you in determining which personnel belong in specific groups.

Note: You might want to give these individuals access to the “List Membership by Class” option, along with appropriate training so they can enter information directly into ASU.

- **Personnel can have membership in more than one User Class.** For example, Mr. Smith might be a dietitian also working toward a nursing degree. You can include him as a member in both the Dietitian and Nurse classes.

2.0 About User Classes

ASU includes pre-defined User Classes to help you get started. These classes are based on standard clinical job functions. ASU recommends that you use these as your beginning classes. After you become more familiar with ASU, you will want to create and define a hierarchy that fits best with your specific facility. Appendix A contains a list of all pre-defined User Classes.

2.1 Populating Pre-Defined User Classes

It is not necessary to allocate every user membership into a pre-defined class; however, you must allocate members to the Clinical Coordinator, Medical Records Technician, Chief, MIS and Transcriptions classes for basic TIU implementation. Any users who you do not allocate to a specific class will be treated as members of the root User class. The following table defines the required allocation classes.

Class	Definition
Clinical Coordinator	Individual assigned to the application coordinator role for TIU. This person sets up users and managed business rules. This individual and sets up the TIU document hierarchy.
Medical Record Technician	Individual(s) who will be verifying uploaded transcription documents.
Chief, MIS	Supervisory personnel who can amend signed notes and perform other special functions.
Transcriptionist	Individual(s) who type in notes for someone else.

2.2 Creating User Classes

After you have populated the pre-defined User Classes, you might want to create additional User Classes that represent the specific job functions at your facility. To define a new User class, follow these steps:

1. Type TIUM at the “Select IHS Core Option:” prompt to access the TIU Medical Records Menu.
2. Type TMM at the “Select TIU Menu For Medical Records Option:” prompt to access the TIU Maintenance Menu.
3. Type UCM at the “Select TIU Maintenance Menu Option:” prompt to access the User Class Management Menu.
4. Type UCM1 at the “Select User Class Management Menu Option:” prompt as indicated in Figure 2-1.

```

User Class Management Menu
(Demo Hospital)

UCM1  User Class Definition
UCM2  List Membership by User
UCM3  List Membership by Class
UCM4  Manage Business Rules

Select User Class Management Menu Option: UCM1

```

Figure 2-1: Using the User Class Management Menu

5. Type **ACTIVE**, **INACTIVE**, or **ALL USER CLASSES** at the “Select User Class Status:” prompt.
6. At the “Start With Class:” prompt, type the name of the User Class at which you want the display to start or press the Enter key to start with the first User Class.
7. At the “End With Class:” prompt, type the name of the User Class at which you want the display to end or press the Enter key to end with the last User Class.

```

Select User Class Status: ACTIVE// ??

Active                               All User Classes
Inactive
Select User Class Status: ACTIVE// ALL USER CLASSES
Start With Class: FIRST// <ENT>
Go To Class: LAST// <ENT>
Searching for the User Classes....

```

Figure 2-2: Creating a User Class Display

8. All User Classes within the parameters you indicated display, as shown in Figure 2-3.

User Classes		Mar 04, 1997 08:49:29	Page: 1 of 39
		ALL USER CLASSES	578 Classes
Class Name	Abbrev		
ADP Coordinator	ADPAC	Inactive	
Acting Assistant Director	AAD	Active	
Acting Chief	AC	Active	
Acting Director	AD	Inactive	
Addiction Medicine	ADDICT	Active	
Adolescent Medicine Internist	ADOLMD	Active	
Allergist	ALLRG	Active	
+ Allergy & Immunology	ADR	Active	
Allergy & Immunology: Clinical & Laboratory	ALLCL	Active	
Ancillary Testing	AT	Active	
+ Anesthesiologist	ANES	Active	
Anesthesiologist - Critical Care	ANESCC	Active	
Anesthesiologist - Pain Management	ANESPM	Active	
Applications Coordinator	ADPAC	Active	
Assistant Chief	AC	Active	16.
Assistant Chief Of Staff			
+ Next Screen - Prev Screen ?? More Actions			
Find	Expand/Collapse Tree	Change View	
Create a Class	List Members	Quit	
Edit User Class			
Select Action: Next Screen//			

Figure 2-3: Viewing Available User Classes

9. Type **CREATE A CLASS** at the “Select Action:” prompt.
10. Type the appropriate class name at the “Select Class:” prompt. This entry must be between 2-60 characters in length.
11. The system displays an inquiry prompt regarding the creation of the new class. Type **YES** to create the class or **NO** to cancel.
12. Review the User Class name indicated at the “Name:” prompt. Modify as necessary.
13. At the “Display Name:” prompt, modify the way in which you want the User Class name to display, if necessary.
14. Type an appropriate abbreviation at the “Abbreviation:” prompt.
15. At the “Active:” prompt, type **1** to make the User Class active or **0** to make the User Class inactive.
16. At the “Select Subclass:” prompt, type the name of any existing User Classes that you want to make a subclass of this new User Class.
17. Type **YES** at the inquiry prompt to confirm the addition of the new subclass or **NO** to cancel.

18. Repeat steps 13 and 14 as appropriate.

2.3 Creating User Subclasses

After you have updated the User Classes within your system, you might want to add those User Classes as subclasses in other User Classes.

Note: Before you can add a subclass, it must exist in the system as its own User Class.

To add subclasses to User Classes, follow these steps:

1. Type **TIUM** at the “Select IHS Core Option:” prompt to access the TIU Medical Records Menu.
2. Type **TMM** at the “Select TIU Menu For Medical Records Option:” prompt to access the TIU Maintenance Menu.
3. Type **UCM** at the “Select TIU Maintenance Menu Option:” prompt to access the User Class Management Menu.
4. Type **UCM1** at the “Select User Class Management Menu Option:” prompt.
5. Type **ACTIVE**, **INACTIVE**, or **ALL USER CLASSES** at the “Select User Class Status:” prompt.
6. Type the appropriate User Class name at the “Start with Class:” prompt.
7. Type the appropriate User Class name at the “Go To Class:” prompt.

```
Select User Class Status: ACTIVE// ACTIVE
      Start With Class: FIRST// STUDENT
      Go To Class: LAST// STUDENT
Searching for the User Classes.
```

Figure 2-4: Specifying a User Class

8. The designated User Class displays as shown in Figure 2-5.

User Classes		Sep 18, 2003 16:03:22	Page: 1 of 1
Classes		ACTIVE USER CLASSES	1
Class Name	Abbrev	Active	
1 +Student	STUD		
+ Next Screen - Prev Screen ?? More Actions			
Find	Expand/Collapse Class	Change View	
Create a Class	List Members	Quit	
Edit User Class			
Select Action: Quit//			

Figure 2-5: Viewing a User Class Display

9. At the “Select Action:” prompt, type **Edit User Class**.
10. Press the Enter key at the “Name:” prompt to indicate that the system should not change the User Class name.
11. Press the Enter key at the “Display Name:” prompt to indicate that the system should not change the display name.
12. Press the Enter key at the “Abbreviation:” prompt to indicate that the system should not change the abbreviation name.
13. Press the Enter key at the “Active:” prompt to indicate that the system should not change the User Class status.
14. At the “Select Subclass:” prompt, type the name of the User Class that you would like to add as a subclass.
15. Type **YES** at the inquiry prompt to confirm the addition of the new subclass or **NO** to cancel.
16. Repeat steps 13 and 14 as appropriate.

```

User Classes                               Sep 19, 2003 08:16:15           Page: 1 of 1
                                           ACTIVE USER CLASSES                               1
Classes
  Class Name                               Abbrev
1    +Student                               STUD           Active

+ Next Screen - Prev Screen ?? More Actions
Find                               Expand/Collapse Class   Change View
Create a Class                     List Members            Quit
Edit User Class

Select Action: Quit// EDIT USER CLASS   Edit User Class

Editing #1

NAME: STUDENT//
DISPLAY NAME: Student//
ABBREVIATION: STUD//
ACTIVE: Active//
Select SUBCLASS: NURSE STUDENT// PHARMACY STUDENT
  Are you adding 'PHARMACY STUDENT' as a new SUBCLASS (the 4TH for this USR
CLASS)? No// YES   (Yes)
Select SUBCLASS:
    
```

Figure 2-6: Adding a Subclass

2.4 Modifying User Classes

As your facility changes, you might need to modify User Class properties to reflect those changes. To modify User Classes, follow these steps:

1. Type TIUM at the “Select IHS Core Option:” prompt to access the TIU Medical Records Menu.
2. Type TMM at the “Select TIU Menu For Medical Records Option:” prompt to access the TIU Maintenance Menu.
3. Type UCM at the “Select TIU Maintenance Menu Option:” prompt to access the User Class Management Menu.
4. Type UCM1 at the “Select User Class Management Menu Option:” prompt.
5. Type ACTIVE, INACTIVE, or ALL USER CLASSES at the “Select User Class Status:” prompt.
6. Type the appropriate User Class name at the “Start with Class:” prompt.
7. Type the appropriate User Class name at the “Go To Class:” prompt.

```
Select User Class Status: ACTIVE// ACTIVE
      Start With Class: FIRST// STUDENT
      Go To Class: LAST// STUDENT
Searching for the User Classes.
```

Figure 2-7: Specifying a User Class

8. The designated User Class displays as shown in Figure 2-8.

```
User Classes                Sep 18, 2003 16:03:22                Page: 1 of 1
                        ACTIVE USER CLASSES                                1
Classes
  Class Name                Abbrev                Active
1  +Student                STUD                Active

+ Next Screen - Prev Screen ?? More Actions
Find                Expand/Collapse Class                Change View
Create a Class                List Members                Quit
Edit User Class
Select Action: Quit//
```

Figure 2-8: Displaying a User Class

9. Type **EDIT USER CLASS** at the “Select Action:” prompt.
10. At the “Name:” prompt, type a new name as appropriate.
11. At the “Display Name:” prompt, type a new display name as appropriate.
12. At the “Abbreviation:” prompt, type a new abbreviation as appropriate.
13. At the “Active:” prompt, type the appropriate User Class status.

Note: Typing 0 or Inactive to inactivate an unused class will help create a cleaner list of active classes with which to work.

14. At the “Select Subclass:” prompt, type the name of the User Class that you would like to add as a subclass.
15. Type **YES** at the inquiry prompt to confirm the addition of the new subclass or **NO** to cancel.
16. Repeat steps 13 and 14 as appropriate.

2.4.1 Removing Subclasses from User Classes

To remove a subclass from a user class, follow these steps:

17. Type the appropriate User Class name at the “Start with Class:” prompt.
18. Type the appropriate User Class name at the “Go To Class:” prompt.

```
Select User Class Status: ACTIVE// ACTIVE
      Start With Class: FIRST// CLINICAL SERVICE CHIEF
      Go To Class: LAST// CLINICAL SERVICE CHIEF
Searching for the User Classes.
```

Figure 2-9: Specifying a User Class

19. The designated User Class displays as shown in Figure 2-8.

```
User Classes                               Sep 18, 2003 16:03:22           Page: 1 of 1
                                           ACTIVE USER CLASSES                1
Classes
  Class Name                               Abbrev
1  +CLINICAL SERVICE CHIEF                 SVCC           Active

+ Next Screen - Prev Screen ?? More Actions
Find           Expand/Collapse Class   Change View
Create a Class List Members       Quit
Edit User Class
Select Action: Quit//
```

Figure 2-10: Displaying a User Class

20. Type **EDIT USER CLASS** at the “Select Action:” prompt.
21. Press the Enter key at the “Name:” prompt.
22. Press the Enter key at the “Display Name:” prompt.
23. Press the Enter key at the “Abbreviation:” prompt.
24. Press the Enter key at the “Active:” prompt.
25. At the “Select Subclass:” prompt, type the name of the Subclass that you would like to remove from this user class.
26. Type **YES** at the inquiry prompt to confirm the selection of the new subclass or **NO** to cancel.
27. Type **@** at the “Subclass:” prompt, to indicate that you want to delete this subclass.
28. Type **YES** at the inquiry prompt to confirm the selection of the new subclass or **NO** to cancel.

2.5 Viewing User Classes and Subclasses

1. To view the subclasses associated with a user class, select the User Class and type EXPAND at the “Select Action:” prompt. The system displays the expanded User Class, as shown in Figure 2-11

User Classes	Sep 19, 2003 08:17:54	Page:	1 of
1	ACTIVE USER CLASSES		5 Classes
	Class Name	Abbrev	
1	-Student	STUD	Active
2	_+Medical Student	MS	Active
3	_ Occupational Therapy Student	OTS	Active
4	_ Nurse Student		Active
5	_ Pharmacy Student	PHSTU	Active
+ Next Screen - Prev Screen ?? More Actions			
	Find	Expand/Collapse Class	Change View
	Create a Class	List Members	Quit
	Edit User Class		
	Select Action: Quit//		

Figure 2-11: Expanding a User Class

3.0 Reviewing User Class Membership

To maintain accurate User Class membership, you should conduct periodic reviews of the personnel assigned to each class. The system provides two options for reviewing User Class membership: “List Membership by User” and “List Membership by Class”.

3.1 List Membership by User

With this option, you can select an individual and the program will display the User Classes to which that individual is assigned. Follow these steps to list membership by user.

1. Select the “List Membership by User” option from the User Class Management menu.
2. At the “Select User:” prompt, type the name of the appropriate user. The system displays the User Classes to which that individual belongs, as shown in

Current User Classes		Sep 19, 2003 08:53:57	Page: 1 of
1		JONES, SALLY	3 Classes
	User Class	Title	Effective
	Expires		
1	Clinical Clerk		09/16/03
2	Medical Record Supervisor		09/16/03
3	Nurse		09/16/03
+ Next Screen - Prev Screen ?? More Actions			
	Add	Remove	Quit
	Edit	Change View	
Select Action: Quit//			

Figure 3-1: Viewing Memberships by User

3.1.1 Adding Individuals to User Class Membership

Follow these steps to add individuals to User Class membership:

1. At the “Select Action:” prompt, type ADD.
2. At the “Select User Class:” prompt, type the name of the appropriate User Class.

3. At the “Effective Date:” prompt, type the date on which this individual became a member of the User Class.
4. At the “Expiration Date:” prompt, type the date on which this individual’s membership should end.
5. At the “Title:” prompt, type 0 to ignore the indicated title, or 1 to designate the selected class as the users primary title.

Note: You can create business rules based on title to dictate access to specific unsigned documents. For instance, an unsigned document created by a user with the title Surgeon might be treated differently than one created by a user with the title Student.

3.1.2 Removing Individuals from User Class Membership

Follow these steps to remove individuals from User Class membership:

1. At the “Select Action:” prompt, type REMOVE.
2. At the “Select Class(s):” prompt, type the number associated with the user group you want to remove.
3. At the inquiry prompt, type YES to complete the removal or NO to cancel.

3.1.3 Editing Individual Class Memberships

Follow these steps to edit the properties associated with individual class memberships:

1. At the “Select Action:” prompt, type EDIT.
2. At the “Select Class(s):” prompt, type the number associated with the User Class you want to edit.
3. At the “User Class:” prompt, you can specify another User Class or press the Enter key to continue editing.
4. At the “Effective Date:” prompt, modify the effective date as necessary.
5. At the “Expiration Date:” prompt, modify the expiration date as necessary.
6. At the “Title:” prompt, type 0 to ignore the indicated title, or 1 to designate the selected class as the users primary title.

3.2 List Membership by Class

With this option, you can view all the current members of a selected User Class. Follow these steps to list membership by class:

1. Select the “List Membership by Class” option from the User Class Management menu.
2. At the “Select Class:” prompt, type the name of the appropriate User Class. The system displays the individuals assigned to the designated User Class, as shown in Figure 3-2.

User Class Members		Sep 19, 2003 09:36:43	Page: 1 of 1
		CLINICAL COORDINATORS	3
Members			
	Member	Effective	Expires
1	JONES, SALLY	09/25/03	
2	SMITH, ANDREW	09/18/03	09/17/04
3	WARNER, CHRISTINE	07/17/03	
+ Next Screen - Prev Screen ?? More Actions			
>>>			
	Add	Remove	Change View
	Edit	Schedule Changes	Quit
Select Action: Quit//			

Figure 3-2: Viewing Membership by User Class

3.2.1 Adding Members to User Classes

Follow these steps to add members to User Classes:

1. At the “Select Action:” prompt, type ADD.
2. At the “Select Member:” prompt, type the name of the appropriate individual. The system displays the member’s name, title and associated job function.
3. At the “Member:” prompt, change the name of the member if necessary or press the Enter key to accept the indicated individual.
4. AT the “Effective Date:” prompt, type the date on which this individual became a member of the User Class.
5. At the “Expiration Date:” prompt, type the date on which this individual’s membership should end.

6. At the “Title:” prompt, type 0 to ignore the indicated title, or 1 to designate the selected class as the users primary title.
7. Repeat steps 3 to 6 as appropriate.

3.2.2 Removing Members from User Classes

Follow these steps to remove members from User Classes:

1. At the “Select Action:” prompt, type REMOVE.
2. At the “Select Member(s):” prompt, type the number associated with the individual whose membership you want to remove.
3. At the inquiry prompt, type YES to complete the removal or NO to cancel.

3.2.3 Editing Individual Class Memberships

Follow these steps to edit the properties associated with individual class memberships:

1. At the “Select Action:” prompt, type EDIT.
2. At the “Select Members(s):” prompt, type the number associated with the individual(s) whose membership you want to edit.
3. At the “User Class:” prompt, you can specify another User Class or press the Enter key to continue editing the current User Class.
4. At the “Effective Date:” prompt, modify the effective date as necessary.
5. At the “Expiration Date:” prompt, modify the expiration date as necessary.
6. At the “Title:” prompt, type 0 to ignore the indicated title, or 1 to designate the selected class as the users primary title.

3.2.4 Scheduling Class Membership Changes

When you know that an individual’s class membership will be changing, such as the scheduled rotation between resident groups, you can schedule changes ahead of time. This functionality allows you to ensure that users can only create, edit, and sign documents associated with their current class during the specified period. Follow these steps to schedule changes to class membership:

1. At the “Select Action:” prompt, type SCHEDULE CHANGES.
2. At the “Select Class:” prompt, specify the User Class or press the Enter key to continue editing the current User Class.

3. At the “Specify Effective Date/Time:” prompt, modify the effective date as necessary.
4. At the “Specify Expiration Date/Time:” prompt, modify the expiration date as necessary.

4.0 About Business Rules

Business Rules authorize specific users or groups of users to perform specified actions on documents depending on the document status. ASU recognizes four separate items that make up a business rule. The following table describes these items.

Term	Description
Document Definition	Document definitions allow you to specify the type of document in your business rules. These definitions include document status, such as unsigned, signed, and completed. <i>An unsigned progress note is an example of a document definition, where progress note is the document, and unsigned is the definition.</i>
User Class	User classes allow you to specify who can modify a document in your business rules. <i>Provider is an example of a User Class.</i>
User Role	User roles allow you to specify which member of a group can modify a document in your business rules. <i>Attending Physician is an example of a user role.</i>
User Action	User actions allow you to specify what actions a user can perform on a document in your business rules. <i>Delete is an example of a user action.</i>

Business Rule Example

A provider who is the expected signer can edit an unsigned progress note. The following table describes the terms used in this example.

Term	Description
Provider	A User Class to which an individual can be assigned.
Expected signer	A user role associated with a specific document.
Edit	A user action associated with a specific document.
Unsigned progress note	A standard document to which you can apply specific business rules to limit user access and actions.

4.1 About Pre-Defined Business Rules

ASU includes pre-defined business rules to help you get started. These rules are based on standard clinical job functions. ASU recommends that you use these as your beginning rules. After you become more familiar with ASU, you will want to create and define business rules that best fit with your specific facility. Appendix B contains a list of all pre-defined business rules.

4.2 Creating Business Rules

After you become familiar with ASU, you might want to create additional business rules that represent the specific job functions at your facility. You can create business rules based on the document definition, User Class, or user role depending on your specific need. To define a new business rule, follow these steps:

1. Select the “Manage Business Rules” option from the User Class Management Menu.
2. At the “Select Search Category:” prompt, type the name of the basis for this rule; document definition, User Class, or user role.
3. Based on your entry from step 2, you will be prompted to select a document definition, User Class, or user role. Type in the appropriate value and the system will display the existing rules associated with that value.
4. At the “Select Action:” prompt, type ADD RULE.
5. At the “Select Document Definition:” prompt, you can type the name of a new document or press the Enter key to proceed with the selected document.
6. At the “Document Definition:” prompt, you can type the name of a new document or press the Enter key to proceed with the selected document.
7. At the “Status:” prompt, type the name associated with the document status you want to define.
8. At the “Action:” prompt, type the name of the action you want to define.
9. At the “User Class:” prompt, type the name of the User Class you want to define.
10. At the “And Flag:” prompt, type the appropriate symbol to designate the condition type you want to define. See the following table for more information about condition types and symbols.

Condition	Description
And (&)	<p>This condition dictates that an individual must be a member of the specified User Class <i>AND</i> assigned to the specified user role in order to perform the specified action.</p> <p>For example, you might designate that an individual must be a member of the Provider user group <i>AND</i> the Author of a document in order to edit that document.</p>
Or (!)	<p>This condition dictates that an individual must be a member of the specified User Class <i>OR</i> assigned to the specified user role in order to perform the specified action.</p> <p>For example, you might designate that an individual must be a member of the Provider user group <i>OR</i> the Author of a document in order to edit that document.</p>

11. At the “User Role:” prompt, type the name of the user role you want to define.
12. At the “Description:” prompt, type a brief description of the rule you are creating.

13. Use the “Edit Option:” prompt to edit the Description text.

4.3 Modifying Business Rules

As your facility changes, you might need to edit existing business rules to reflect those changes. The procedure for editing business rules is almost identical to that of creating business rules, except in *Step 4* you type **Edit Rule** instead of **Add Rule**. Refer to the steps listed in *Creating Business Rules* for details.

4.4 Deleting Business Rules

Business rules become outdated as facilities change. You can modify business rules when appropriate, but you might want to delete a rule entirely. To delete a business rule, follow these steps:

1. At the “Select Action:” prompt, type **Delete Rule**.
2. At the “Select Business Rule(s):” prompt, type the number associated with the business rule you want to delete. The system displays the description associated with the indicated rule.
3. At the inquiry prompt, type **Yes** to permanently delete the rule or **No** to cancel.

5.0 Troubleshooting

These sections describe common system issues and initial actions you can perform to resolve these issues.

Individual cannot access permitted items

- Make sure the individual is in the appropriate User Class.
- Make sure the associated business rule is assigned to the correct status.
- Make sure that the document indicated in the business rule is correct.
- Make sure the individual is assigned to the appropriate user role.
- Make sure the associated business role has not been overridden by another rule. Rules with the same actions and status at a lower level take precedence of those at a higher level.

Example:

Rule #1: Providers can enter undictated progress notes.

Rule #2: Nurse Practitioners can enter undictated nurse practitioner notes.

The second rule overrides the first in relation to undictated nurse practitioner notes. Therefore, a provider cannot enter undictated nurse practitioner notes even though they are descendants of undictated progress notes. To correct this, you could edit the second rule to indicate that nurse practitioners *OR* providers can enter undictated nurse practitioner notes.

Note: To easily identify overriding business rules, use FileMan to print by the same Action and the same Status.

Individual can access restricted items

- Make sure the individual is not a member of an incorrect User Class
- Make sure the specific business rule is not being overridden.
- Make sure the individual is not assigned to an incorrect user role.

5.1.1 Relationship between User Class File and Person Class File

Although there are a number of superficial similarities between the User Class file and kernel's Person Class file, the files are structurally different as they are designed to serve different applications.

The User Class file provides for the definition of a hierarchy of User Classes. This hierarchy must be to be flexible enough to describe the organizational structure of the local facility.

The Person Class file is designed to accommodate the Centers for Medicare & Medicaid Services (CMS) Health Care Provider Taxonomy List. This system is an emerging industry standard for identifying the occupations, specialties, and subspecialties to which health care providers belong. This file is standardized across VHA, and cannot be extended to accommodate differences in local organizational structure.

6.0 Glossary

Term	Definition
Action	A functional process that an individual uses in the ASU computer program, such as edit, complete or delete. An action is also called a protocol.
Authorization	Access to perform a function within the ASU computer program, such as edit, complete or delete.
Business Rules	Definitions that restrict access to certain functions by determining which User Class/subclass can perform specific functions within documents.
Discharge Summary	A formal synopsis of a patient's medical care during a single hospitalization, including tests procedures, and conclusions.
Document Class	Groups of similar document that store behavior derived from business rules.
Document Definition	Distinctions that allow you to specify the type of document in business rules. These definitions include document status, such as unsigned, signed, and completed.
Hierarchy	An organization structure in which items are ranked with each level subordinate to the one above.
Progress Notes	A series of notes tracking a patient's progress during treatment.
Subclasses	Groups defined by personnel job function to designate access to documentation functions such as editing, completing, or deleting. The most specific level of grouping within ASU.
TIU	Text Integration Utilities, a RPMS document management application.
User Class	Groups defined by personnel job functions used to designate access to documentation functions such as editing, completing, or deleting. The most general level of grouping within ASU.
User Role	Specific functions assigned to an individual on a case-by-case basis, such as author, signer, or editor.

7.0 Appendix A: Pre-Defined User Classes

A

ACTING ASSISTANT CHIEF
ACTING CHIEF
ADDICTION MEDICINE
ADJUDICATION OFFICER
ALLERGIST
ALLERGY & IMMUNOLOGY
ALLERGY & IMMUNOLOGY: CLINICAL &
LABORATORY
ANCILLARY TESTING
ANESTHESIOLOGIST
ANESTHESIOLOGIST - CRITICAL CARE
ANESTHESIOLOGIST - PAIN MANAGEMENT
ASSISTANT CHIEF
ASSISTANT CHIEF OF STAFF
ASSOCIATE CHIEF OF STAFF
ATTENDING PHYSICIAN
AUDIOLOGIST
AUDIOVISUAL SPECIALIST

B

BODY IMAGING

C

CADIOLOGIST
CAST TECHNICIAN
CHAPLAIN
CHIEF
CHIEF RESIDENT
CHIEF TECHNOLOGIST
CHIEF, ANESTHESIOLOGY SERVICE
CHIEF, MEDICAL SERVICE
CHIEF, MIS
CHIEF, PSYCHIATRY SERVICE
CHIEF, RESEARCH SERVICE
CHIEF, SURGICAL SERVICE
CLINICAL CLERK
CLINICAL COORDINATOR
CLINICAL DIETITIAN
CLINICAL INTERN
CLINICAL PHARMACIST
CLINICAL SERVICE CHIEF
CLINICAL SPECIALIST
CONSULT/LIAISON
CONSULTANT
COORDINATOR, OPERATING ROOM
COORDINATOR, QM/MIS
COUNSELOR
CYTOTECHNOLOGIST

D

DENTAL ASSISTANT
DENTAL INTERN
DENTAL RESIDENT
DENTIST
DERMATOLOGIST
DERMATOLOGIST: CLINICAL & LABORATORY
DERMATOLOGY FELLOW
DERMATOPATHOLOGIST
DIABETES STUDY NURSE
DIALYSIS TECHNICIAN
DIETETIC INTERN
DIETETIC TECHNICIAN STUDENT
DIETITIAN
DIETITIAN CLINICAL SPECIALIST
DISTINGUISHED PHYSICIAN
DRG COORDINATOR

E

ECHO TECHNICIAN
EDUCATION STAFF SPECIALIST
ELECTRON MICROSCOPIST
EMERGENCY MEDICINE PHYSICIAN
EMERGENCY SPORTS MEDICINE
EMG TECHNICIAN
ENDOCRINOLOGIST
EPIDEMIOLOGIST
EXERCISE PHYSIOLOGIST

F

FAMILY GERIATRICIAN
FAMILY PRACTICE PHYSICIAN
FAMILY SPORTS MEDICINE
FEE BASIS NURSE
FELLOW

G

GENERAL PRACTICE PHYSICIAN
GENERIC SCREENING NURSE
GERIATRICS, GENERAL PRACTITIONER
GRADUATE NURSE TECHNICIAN
GYNECOLOGIST

H

HEAD NURSE

HEALTH CARE TECHNICIANS
 HEMATOLOGY & ONCOLOGY
 HEMODIALYSIS TECHNICIAN
 HISTOPATHOLOGY TECHNICIAN
 HISTOTECHNOLOGIST
 HIV/AIDS COORDINATOR
 HOME CARE CLINICAL COORDINATOR
 HOSPITAL EPIDEMIOLOGIST
 HYGIENIST

I

IMAGE ASSISTANT
 INDUSTRIAL HYGIENIST
 INFECTION CONTROL NURSE
 INFECTIOUS DISEASE FELLOW
 INPATIENT PSYCHOLOGIST
 INTERN
 INTERN PHYSICIAN
 INTERN: ALLOPATHIC
 INTERN: OSTEOPATHIC
 IV PHARMACIST
 IV TECHNICIAN

J

JUNIOR ASSISTANT RESIDENT
 JUNIOR RESIDENT

K

KINESIOTHERAPIST

L

LABORATORY PATHOLOGIST
 LABORATORY PROGRAM ASSISTANT
 LABORATORY TECHNICIAN
 LEAD PHARMACIST

M

MEDICAL CLERK
 MEDICAL CLERK SUPERVISOR
 MEDICAL DATA CLERK
 MEDICAL INFORMATION SECTION
 MEDICAL INTERN
 MEDICAL PROGRAM ASSISTANT
 MEDICAL RECORD SUPERVISOR
 MEDICAL RECORDS TECHNICIAN
 MEDICAL STUDENT
 MEDICAL STUDENT III
 MEDICAL STUDENT IV
 MEDICAL TECHNICIAN
 MEDICAL TECHNOLOGIST

M

MEDICAL TECHNOLOGY STUDENT
 MEDICAL TOXICOLOGIST
 MIS FILE CLERK

N

NARCOTIC TECHNICIAN
 NEUROLOGY PROGRAM CLERK
 NEUROLOGY RESIDENT
 NEUROLOGY TECHNICIAN
 NUCLEAR CARDIOLOGY
 NUCLEAR CARDIOLOGY DIRECTOR
 NUCLEAR MEDICINE TECHNICIAN
 NURSE
 NURSE - STUDENT
 NURSE ANESTHETIST
 NURSE CLINICAL SPECIALIST
 NURSE EPIDEMIOLOGIST
 NURSE LICENSED PRACTICAL
 NURSE PRACTITIONER
 NURSING ASSISTANT
 NURSING CLERK TYPIST
 NURSING CONTINUING CARE
 NURSING SUPERVISOR
 NUTRITION CLINIC DIETITIAN
 NUTRITION SUPPORT NURSE

O

OCCUPATIONAL THERAPIST
 OCCUPATIONAL THERAPY ASSISTANT
 OCCUPATIONAL THERAPY STUDENT
 OCCURRENCE SCREENING
 ONCOLOGY NURSE
 OPC SCHEDULING SUPERVISOR
 OPERATING ROOM COORDINATOR
 OPERATING ROOM TECHNICIAN
 OPHTHALMOLOGIST
 OPTOMETRIST
 ORAL SURGERY RESIDENT
 ORTHOTIST/PROSTHETIST
 OTOLARYNGOLOGY
 OUTPATIENT CLINIC
 OUTPATIENT CLINIC SUPERVISOR
 OUTPATIENT PSYCHOLOGIST
 OUTPATIENT RX SUPERVISOR
 OUTPATIENT TECHNICIAN

P

PATHOLOGIST
 PATHOLOGY RESIDENT
 PEDIATRIC EMERGENCY PHYSICIAN
 PHARMACIST
 PHARMACY COORDINATOR

PHARMACY MEDICAL CLERK
 PHARMACY STUDENT
 PHARMACY SUPERVISOR
 PHARMACY TECHNICIAN
 PHARMACY TRAINEE
 PHLEBOTOMIST
 PHYSICAL THERAPIST
 PHYSICAL THERAPY AID
 PHYSICIAN
 PHYSICIAN ASSISTANT
 PHYSICIST
 PODIATRIST
 POST GRADUATE YEAR 1 RESIDENT
 POST GRADUATE YEAR 2 RESIDENT
 POST GRADUATE YEAR 3 RESIDENT
 POST GRADUATE YEAR 4 RESIDENT
 PRIVACY ACT OFFICER
 PROCTOLOGIST
 PROSTHETIC REPRESENTATIVE TRAINEE
 PROSTHETICS
 PROSTHETICS CLERK
 PROSTHETICS REPRESENTATIVE
 PROVIDER
 PSYCHIATRIC RESEARCH ASSISTANT
 PSYCHIATRIST
 PSYCHIATRY CLERK
 PSYCHIATRY PROGRAM ASSISTANT
 PSYCHIATRY RESIDENT
 PSYCHOLOGY CLINICAL ASSOCIATE
 PSYCHOLOGY INTERN
 PSYCHOLOGY PROGRAM CLERK

P

PSYCHOLOGY REHABILITATION TECHNICIAN
 PSYCHOLOGY RESEARCH
 PSYCHOLOGY VOCATIONAL REHAB SPEC
 PULMONARY CHIEF
 PULMONARY CLINICAL SPECIALIST
 PULMONARY FELLOW
 PULMONARY FUNCTION TECH
 PULMONARY LAB SUPERVISOR
 PULMONARY STAFF CHIEF OF STAFF
 PULMONARY TECHNICIAN

R

RADIATION DIAGNOSTIC TECHNOLOGIST
 RADIATION ONCOLOGIST
 RADIATION THERAPY TECHNOLOGIST
 RADIOGRAPHER
 RADIOLOGIST
 RADIOLOGY DIAGNOSTIC TECH
 RADIOLOGY FILE ROOM SUPERVISOR
 RADIOLOGY RESIDENT
 RADIOLOGY TECHNICIAN
 RADIOLOGY TRANSCRIPTIONIST
 RECREATION THERAPIST
 RECREATIONAL THERAPY ASSISTANT

REMOTE USER
 RENAL FELLOW
 RESEARCH NURSE
 RESEARCH TECHNICIAN
 RESEARCH TECHNOLOGIST
 RESIDENT PHYSICIAN
 RESPIRATORY THERAPIST

S

SECTION CHIEF
 SENIOR ASSISTANT RESIDENT
 SENIOR RESIDENT
 SOCIAL WORK ASSOCIATE
 SOCIAL WORK INTERN
 SOCIAL WORK SECRETARY
 SOCIAL WORKER
 SOCIAL WORKER SUPERVISOR
 SOLUTIONS TECHNICIAN
 SPECIAL PROCEDURES
 SPEECH PATHOLOGIST
 SPEECH PATHOLOGY SECTION CHIEF
 STAFF DENTIST
 STAFF INTERNIST
 STAFF NURSE
 STAFF PATHOLOGIST
 STAFF PHARMACIST
 STAFF PHYSICIAN
 STAFF PSYCHIATRIST
 STAFF PSYCHOLOGIST
 STAFF RADIOLOGIST
 STAFF SOCIAL WORKER
 STAFF SURGEON
 STUDENT
 STUDENT RADIOGRAPHER
 SUB-INTERN
 SUPERVISOR
 SUPERVISOR, BLOOD BANK
 SUPERVISOR, C&P UNIT
 SUPERVISOR, EVENING LABS
 SUPERVISOR, HEMATOLOGY LAB
 SUPERVISOR, IMMUNOLOGY LAB
 SUPERVISOR, MICROBIOLOGY LAB
 SUPERVISOR, MIS
 SUPERVISOR, PULMONARY FUNCTION LAB
 SUPERVISOR, SPECIAL CHEM LAB
 SUPERVISOR, STAT CHEM LAB
 SUPERVISORY BIOCHEMIST
 SUPERVISORY IMMUNOLOGIST
 SUPERVISORY MICROBIOLOGIST
 SUPERVISORY PHARMACIST

T

TRANSCRIPTIONIST
 TUMOR REGISTRAR

U

UNIT COORDINATOR
UNIT NURSE
UNIT TEACHER
USER

V

VASCULAR NURSE
VETERINARIAN MEDICAL OFFICER
VOCATIONAL REHABILITATION SPECIALIST

8.0 Appendix B: Exported Business Rules

8.1 Business Rules for Clinical Documents

1. An UNTRANSCRIBED (CLASS) CLINICAL DOCUMENT may be ENTERED by A USER
2. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be RELEASED by A TRANSCRIBER
3. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by An AUTHOR/DICTATOR
4. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by An EXPECTED SIGNER
5. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be SIGNED by An EXPECTED SIGNER
6. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be SIGNED by A PROVIDER who is also An EXPECTED COSIGNER
7. A COMPLETED (CLASS) CLINICAL DOCUMENT may be VIEWED by A USER
8. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be EDITED by A TRANSCRIBER
9. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be EDITED by A TRANSCRIPTIONIST
10. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be COSIGNED by An EXPECTED COSIGNER
11. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be SIGNED by A STUDENT who is also An EXPECTED SIGNER
12. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by An EXPECTED COSIGNER
13. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by An EXPECTED COSIGNER
14. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS

15. An UNDICTATED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
16. An UNTRANSCRIBED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
17. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
18. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
19. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
20. A COMPLETED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
21. An AMENDED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
22. A COMPLETED (CLASS) CLINICAL DOCUMENT may be PRINTED by A USER
23. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be VIEWED by An EXPECTED COSIGNER
24. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by A CLINICAL SERVICE CHIEF
25. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be EDITED by A CLINICAL SERVICE CHIEF
26. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be SIGNED by An ADDITIONAL SIGNER
27. A COMPLETED (CLASS) CLINICAL DOCUMENT may be SIGNED by An ADDITIONAL SIGNER
28. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be SIGNED by An ADDITIONAL SIGNER
29. An AMENDED (CLASS) CLINICAL DOCUMENT may be VIEWED by A USER
30. An AMENDED (CLASS) CLINICAL DOCUMENT may be PRINTED by A USER

31. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be COPIED by An AUTHOR/DICTATOR
32. A COMPLETED (CLASS) CLINICAL DOCUMENT may be COPIED by A USER
33. A DELETED (CLASS) CLINICAL DOCUMENT may be DELETED by A CLINICAL COORDINATOR
34. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be SENT BACK by A MEDICAL INFORMATION SECTION
35. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be SENT BACK by A MEDICAL INFORMATION SECTION
36. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be VIEWED by An EXPECTED COSIGNER
37. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be VIEWED by A CLINICAL SERVICE CHIEF
38. A COMPLETED (CLASS) CLINICAL DOCUMENT may be AMENDED by A CHIEF, MIS
39. A COMPLETED (CLASS) CLINICAL DOCUMENT may be ADDENDED by A USER
40. An AMENDED (CLASS) CLINICAL DOCUMENT may be ADDENDED by A USER
41. A DELETED (CLASS) CLINICAL DOCUMENT may be VIEWED by A USER
42. A DELETED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
43. A PURGED (CLASS) CLINICAL DOCUMENT may be DELETED by A CHIEF, MIS
44. A PURGED (CLASS) CLINICAL DOCUMENT may be VIEWED by A USER
45. An UNTRANSCRIBED (CLASS) CLINICAL DOCUMENT may be VIEWED by A CHIEF, MIS
46. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be VIEWED by A CHIEF, MIS

47. An UNDICTATED (CLASS) CLINICAL DOCUMENT may be VIEWED by A USER
48. A COMPLETED (CLASS) CLINICAL DOCUMENT may be IDENTIFIED FOR SIGNATURE by An AUTHOR/DICTATOR
49. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be IDENTIFIED FOR SIGNATURE by an AUTHOR/DICTATOR
50. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be IDENTIFIED FOR SIGNATURE by An EXPECTED COSIGNER
51. A COMPLETED (CLASS) CLINICAL DOCUMENT may be IDENTIFIED FOR SIGNATURE by An EXPECTED COSIGNER
52. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be REASSIGNED by A MEDICAL INFORMATION SECTION
53. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be REASSIGNED by An AUTHOR/DICTATOR
54. An UNSIGNED (CLASS) CLINICAL DOCUMENT may be HAVE ITS TITLE CHANGED by An AUTHOR/DICTATOR
55. A COMPLETED (CLASS) CLINICAL DOCUMENT may be HAVE ITS TITLE CHANGED by A CHIEF, MIS
56. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be HAVE ITS TITLE CHANGED by An EXPECTED COSIGNER
57. An UNCOSIGNED (CLASS) CLINICAL DOCUMENT may be HAVE ITS TITLE CHANGED by A CLINICAL SERVICE CHIEF
58. A COMPLETED (CLASS) CLINICAL DOCUMENT may be REASSIGNED by A CHIEF, MIS
59. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be VIEWED by A MEDICAL INFORMATION SECTION
60. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be VERIFIED by A MEDICAL INFORMATION SECTION
61. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be EDITED by A MEDICAL INFORMATION SECTION
62. An UNVERIFIED (CLASS) CLINICAL DOCUMENT may be PRINTED by A MEDICAL INFORMATION SECTION

63. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be VIEWED by A TRANSCRIBER
64. An UNRELEASED (CLASS) CLINICAL DOCUMENT may be VIEWED by A TRANSCRIPTIONIST

8.2 Business Rules for Progress Notes

1. A COMPLETED (CLASS) PROGRESS NOTE may be VIEWED by A USER
2. An UNSIGNED (CLASS) PROGRESS NOTE may be EDITED by A STUDENT who is also An AUTHOR/DICTATOR
3. An UNSIGNED (CLASS) PROGRESS NOTE may be DELETED by An AUTHOR/DICTATOR
4. An UNSIGNED (CLASS) PROGRESS NOTE may be VIEWED by An AUTHOR/DICTATOR
5. An UNCOSIGNED (CLASS) PROGRESS NOTE may be VIEWED by An AUTHOR/DICTATOR
6. An UNCOSIGNED (CLASS) PROGRESS NOTE may be VIEWED by An EXPECTED COSIGNER
7. An UNSIGNED (CLASS) PROGRESS NOTE may be PRINTED by An AUTHOR/DICTATOR
8. An UNCOSIGNED (CLASS) PROGRESS NOTE may be PRINTED by An AUTHOR/DICTATOR
9. An UNCOSIGNED (CLASS) PROGRESS NOTE may be EDITED by An EXPECTED COSIGNER
10. An UNSIGNED (CLASS) PROGRESS NOTE may be EDITED by An AUTHOR/DICTATOR
11. An UNCOSIGNED (CLASS) PROGRESS NOTE may be PRINTED by An EXPECTED COSIGNER
12. An UNSIGNED (CLASS) PROGRESS NOTE may be SIGNED by An AUTHOR/DICTATOR
13. An UNCOSIGNED (CLASS) PROGRESS NOTE may be COSIGNED by An EXPECTED COSIGNER

14. An UNSIGNED (CLASS) PROGRESS NOTE may be VIEWED by A CHIEF, MIS
15. An UNSIGNED (CLASS) PROGRESS NOTE may be DELETED by A CHIEF, MIS
16. An UNCOSIGNED (CLASS) PROGRESS NOTE may be VIEWED by A CHIEF, MIS
17. An UNCOSIGNED (CLASS) PROGRESS NOTE may be DELETED by A CHIEF, MIS
18. An UNSIGNED (CLASS) PROGRESS NOTE may be EDITED by An EXPECTED COSIGNER
19. An UNSIGNED (CLASS) PROGRESS NOTE may be VIEWED by An EXPECTED COSIGNER
20. An UNSIGNED (CLASS) PROGRESS NOTE may be EDITED by A CLINICAL SERVICE CHIEF
21. An UNSIGNED (CLASS) PROGRESS NOTE may be VIEWED by A CLINICAL SERVICE CHIEF
22. An UNSIGNED (CLASS) PROGRESS NOTE may be SIGNED by A CLINICAL SERVICE CHIEF
23. An UNSIGNED (CLASS) PROGRESS NOTE may be SIGNED by An EXPECTED COSIGNER

8.3 Business Rules for Discharge Summaries

1. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be EDITED by A PROVIDER who is also An EXPECTED COSIGNER
2. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be SIGNED by A PROVIDER who is also An ATTENDING PHYSICIAN
3. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be COSIGNED by A PROVIDER who is also An EXPECTED COSIGNER
4. An UNVERIFIED (CLASS) DISCHARGE SUMMARY may be VIEWED by A MEDICAL INFORMATION SECTION
5. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be EDITED by A PROVIDER who is also An EXPECTED COSIGNER

6. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be SIGNED by A CLINICAL SERVICE CHIEF
7. An UNVERIFIED (CLASS) DISCHARGE SUMMARY may be VERIFIED by A MEDICAL INFORMATION SECTION
8. An UNVERIFIED (CLASS) DISCHARGE SUMMARY may be EDITED by A MEDICAL INFORMATION SECTION
9. An UNVERIFIED (CLASS) DISCHARGE SUMMARY may be PRINTED by A MEDICAL INFORMATION SECTION
10. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be VIEWED by A USER
11. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be PRINTED by A USER
12. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be ADDENDED by A USER
13. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be ADDENDED by A USER
14. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be VIEWED by A USER
15. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be COSIGNED by A CLINICAL SERVICE CHIEF
16. An UNCOSIGNED (CLASS) DISCHARGE SUMMARY may be EDITED by A CLINICAL SERVICE CHIEF
17. An UNSIGNED (CLASS) DISCHARGE SUMMARY may be SIGNED by An EXPECTED SIGNER

9.0 Index

A

About This Manual · i
 Access Problems · 18
 And (&) · 16
 Appendix A · 22
 Appendix B · 26

B

Benefits · 1
 Business Rules
 About · **15**
 Clinical Documents · 26
 Conditions · 16
 Creating · 16, 17
 Deleting · **17**
 Discharge Summaries · **30**
 Document Definition · *See*
 Example · 15
 Introduction · **1**
 Modifying · **17**
 Pre-Defined · 15, 26
 Progress Notes · **29**
 User Action · 15
 User Class · 15
 User Role · *See* Business Rules

C

Contact Information · **32**

D

Document Definition · *See* Business Rules

F

Features · 1

G

Glossary · 20

H

Help Desk · **32**

I

Implementation
 Guidelines · 2
 Introduction · 1

L

List Membership by Class · 12
 List Membership by Users · 11

O

Or (!) · 16

P

Person Class File · 18
 Pre-Defined Business Rules · 15, 26
 Pre-Defined User Classes · 22
 Populating · 3

S

Subclasses
 Creating · 6
 Introduction · 1

T

Troubleshooting · 18, **32**

U

User Action · *See* Business Rules
 User Class · *See* Business Rules
 Pre-Defined · 22
 User Class File · 18
 User Class Members
 Adding · 11

Editing · 12
Listing · 11
Removing · 12
User Class Membership
 Adding · 13
 Editing · 14
 Removing · 13
 Scheduling Changes · 14
User Classes

About · 3
Creating · 3
File · 18
Introduction · 1
Modifying · 7
Reviewing · 11
User Role · *See* Business Rules
User Roles
 Introduction · 1

10.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov