RESOURCE AND PATIENT MANAGEMENT SYSTEM

IHS PCC Suite

(BJPC)

Designated Specialty Provider Management System User Manual

Version 2.0 Patch 10
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Office of Information Technology
Division of Information Technology
Albuquerque, New Mexico

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Preface

This manual provides information regarding the use of the Designated Specialty Provider Management System (BDP) Version 2.0 package.

1.0   Introduction

The Patient Care Component (PCC) database is the central repository for data in the Resource and Patient Management System (RPMS).

The PCC suite comprises the following RPMS components:

- IHS Dictionaries (AUPN)

- Standard Tables

- PCC Health Summary, including Health Maintenance Reminders (APCH)

- PCC Data Entry (APCD)

- PCC Management Reports, including PGEN/VGEN (APCL)

- Designated Specialty Provider Management (DSPM)

- Q-Man (Query Manager) (AMQQ)

- Taxonomy Management (ATX)

The RPMS DSPM system facilitates assignment of a panel or multiple panels of patients to a designated primary care provider. The system similarly permits assignment of a panel or panels of patients to one of several specialty care providers, such as a diabetes provider, home care provider, mental health provider, and others.

In addition to initial assignment of patients to primary care and specialty providers, the system facilitates easy changing of patients from one provider to another, and addition and deletion of individual patients from a provider's assigned panel.

The assignment of patient panels to primary care providers and to specialty care providers is intended to assist a facility's comprehensive care team in coordinating the overall care of patients. Additionally, it permits the display of important statistical information by provider panels.

The module includes the following functions:

- Add or edit a patient's healthcare provider assignment for the following standard treating specialty categories:

Code	Category
CM	Case Manager
CD	Chemical Dependency
DPCP	Designated Primary Provider
DM	Diabetes
HIVP	HIV Provider
HIVC	HIV Case Manager
HC	Home Care

Code	Category
MH	Mental Health
OB	OB Care
PHN	Public Health Nurse
RD	Renal Disease
SS	Social Services
WH	Women's Health

This list can be expanded to accommodate site-specific categories:

- Modify/change a specialty provider for an individual patient
- Add/update specialty provider assignments from a template of patients
- Delete current specialty providers from a template of patients
- Transfer assigned patients from one healthcare provider to another
- Update providers for all patients living in a specified community
- Display a specific healthcare provider's current patient panel
- Display provider assignments on patients' health summaries
- Provide links to/from the Women's Health, the Behavioral Health, and the Patient Registration systems. Any changes to patient's case manager/designated provider fields within those packages will also be incorporated into the Designated Specialty Provider package.

- Produce the following reports:

  - Inquiry to a Specific Patient Record
  - Display of a Patient's Provider Assignment History
  - Master Patient List, by Provider Category
  - Listing of a Specific Provider's Patient Panel
  - Listing of Patient Records (By Community of Residence)
  - Listing of all Patient's with No Current Designated Provider
  - User Data Entry/Update Workload reports

2.0   Release Notes

BJPC Version 2.0 Patch 10 contains the following modifications and enhancements:

The "AMA   Assign a Message Agent to one Provider's Patients" option was added to the data entry menu.

3.0   Data Entry Menu (DE)

The options on the Data Entry Menu (DE) are shown below.

```
            *********************************************
            *          INDIAN HEALTH SERVICE           *
            * DESIGNATED SPECIALTY PROVIDER MGT SYSTEM *
            *          VERSION 1.0, Sep 10, 2004       *
            *********************************************
                           DEMO HOSPITAL
                          Data Entry Menu


   UPOP   Update Designated Providers for One Patient
   UOP    Update a Specialty Provider's Patient Panel
   ADD    Add a new Desig Spec Provider for a Patient
   MOD    Modify Existing Desig Spec Provider for a Patient
   DREC   Delete an Individual Patient Record
   TMPU   Update Provider Records from a Patient Template
   TMPD   Delete Provider Records from a Patient Template
   CLOP   Change all of one Provider's Patients to Another
   DLOP   Loop Delete the current Designated Provider
   COMA   Update ALL patients from one Community to a DP
   LUNA   Update Records for Unassigned Patients by Category
   DISP   Inquire to a Specific Patient Record
   DHX    View History of a Patient's Specialty Providers
   AMA    Assign a Message Agent to one Provider's Patients

 Select Data Entry Menu Option:
```

Figure 3-1: Designated Specialty Provider Management System Data Entry menu

3.1   Update Designated Provider for One Patient (UPOP)

Use the UPOP option to edit the designated provider for a specified patient.

To edit a patient's designated provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type UPOP and press Enter.

2. At the "Enter Patient Name" prompt, type the name of the patient.

The Designated Providers screen displays, as shown below:

```
Designated Providers  Jan 13, 2009 14:47:23  Page:  1 of  1
------------------------------------------------------------------
Designated Provider List for: DEMO,JOHNNIE RUTH  HRN: DH 118774
------------------------------------------------------------------
   Category            Provider              Updated


1  DESIGNATED PRIMARY PROVIDER  NPROVIDER,ERIN D          11/21/2005
2  WOMEN'S HEALTH CASE MANAGER   SPROVIDER,JEROME         12/22/2004
3  DIABETES           THETA,SHIRLEY          12/19/2008
```

```
   ?? for more actions + next screen - prev screen
AD  Add Provider          DE  Delete Designated Provider
CP  Change Provider        HS  Health Summary
Select Item(s): Quit//
```

Figure 3-2: Sample Update Designated Provider for One Patient information

At the "Select Action" prompt, do one of the following:

- Type **Q** (Quit) to quit the screen.

- Type a plus sign (+) to display the next screen. This option is not available for the last screen.

- Type a minus sign (–) to display the previous screen. This option is not available for the first screen.

- Use one of the actions listed above the prompt.

3.1.1   Add Provider (AD)

Use the AD action to add a provider in a specified provider category to the Designated Providers screen.

To add a provider, follow these steps:

1. At the "Select Item(s)" prompt, type **AD** and press Enter.

2. At the "Enter the Provider Category" prompt, type the provider category name or code.

3. At the "Enter Provider Name" prompt, type the provider name. The application indicates that the provider was successfully added as the designated provider for the specified category and returns to the "Select Item(s)" prompt.

3.1.2   Change Provider (CP)

Use the CP action to change the provider.

To change a provider, follow these steps:

1. At the "Select Item(s)" prompt, type **CP** and press Enter.

2. At the "Select item to change" prompt, type an integer specifying the record to be changed.

3. At the "Enter New Designated provider" prompt, type the provider name. The application indicates that the provider was successfully added as the designated provider and returns to the "Select Item(s)" prompt.

3.1.3   Delete Designated Provider (DE)

Use the DE action to remove a designated provider from the list.

To remove a provider, follow these steps:

1. At the "Select Item(s)" prompt, type **CP** and press Enter.

2. At the "Select item to change" prompt, type an integer specifying the record to be deleted.

3. Confirm the deletion at the "Please confirm?" prompt by typing **Y** (Yes) or **N** (No). If the user types **Y** (Yes), the designated provider is removed from the list. If the user types **N** (No), nothing is removed from the list and the application returns to the "Select Item(s)" prompt.

3.1.4   Health Summary (HS)

Use the HS option to display the health summary for a specified patient.

To display a health summary, follow these steps:

1. At the "Select Item(s)" prompt, type **HS** and press Enter.

2. At the "Select health summary type name" prompt, type the name of the health summary.

The Output Browser screen displays the Health Summary information, as shown below:

```
OUTPUT BROWSER      Dec 19, 2008 12:48:16  Page:  1 of  4
PCC Health Summary for DEMO,CORRINE ALYSE


** CONFIDENTIAL PATIENT INFORMATION -- 12/19/2008 12:48 PM [SJT] **
******* DEMO,CORRINE ALYSE 155243  (DENTAL SUMMARY) pg 1 *******

---------------------- DEMOGRAPHIC DATA --------------------------

DEMO,CORRINE ALYSE  DOB: NOV 30,1989 19 YRS FEMALE no blood type
DEMO TRIBE, NM          SSN:
            MOTHER'S MAIDEN NAME: ARMACHAIN,JANICE GAYLE
(H) 555-555-8673    FATHER'S NAME: DEMO,HENRY ALLEN
BIRDTOWN (13 MT. NOBLE RD,WHITTIER,NC,28789)
```

```
LAST UPDATED: JUN 25,2003    ELIGIBILITY: PENDING VERIFICATION

NOTICE OF PRIVACY PRACTICES REC'D BY PATIENT?
         DATE RECEIVED BY PATIENT:
        WAS ACKNOWLEDGEMENT SIGNED?

+    Enter ?? for more actions                 >>>
+  NEXT SCREEN    -  PREVIOUS SCREEN   Q  QUIT
Select Action: +//
```

Figure 3-3: Sample Health Summary report

At the "Select Action" prompt, do one of the following:

- Type **Q** (Quit) to quit the screen.

- Type a plus sign (+) to display the next screen. This option is not available for the last screen.

- Type a minus sign (–) to display the previous screen. This option is not available for the first screen.

3.2   Updated a Designated Provider's Patient Panel (UOP)

Use the UOP option to edit a designated provider's patient panel.

To edit a patient panel, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **UOP** and press Enter.

2. At the "Designated Provider Name" prompt, type the name of the provider.

The View/Update Designated Prov screen displays:

```
View/Update Designated Prov Dec 19, 2008 12:02:47  Page: 1 of 1
---------------------------------------------------------------------
Patients with Designated Provider: THETA,SHIRLEY
---------------------------------------------------------------------
  HRN  PATIENT NAME        DOB     SEX LAST VISIT  PROV TYPE

1  103477 DEMO,BIANCA SHOOK     May 19, 1935 F  Mar 03, 1998
DIABETES







 AD  Add Patient to List         CP  Change Desg Provider to Another
 RM  Remove Patient from List     ST  Resort Display of Patients
```

```
HS   Health Summary                    Q    Quit
Select Item(s): Quit//
```

Figure 3-4: Sample View/Update Designated Prov screen

At the "Select Action" prompt, do one of the following:

- Type **Q** (Quit) to quit the screen.

- Type a plus sign (**+**) to display the next screen. This option is not available for the last screen.

- Type a minus sign (**–**) to display the previous screen. This option is not available for the first screen.

- Use one of the actions listed above the prompt.

3.2.1   Add Patient to List (AD)

Use the AD action to add a patient to the designated provider's list.

To add a patient, follow these steps:

1. At the "Select Item(s)" prompt, type **AD** and press Enter.

2. At the "Enter Patient Name" prompt, type the name of the patient.

3. At the "Enter the Type of Designated Provider" prompt, type the code for the type of designated provider. The new patient name is added to the list.

3.2.2   Remove Patient from List (RM)

Use the RM action to remove a specified patient from the designated provider's list.

To remove a patient, follow these steps:

1. At the "Select Item(s)" prompt, type **RM** and press Enter.

2. At the "Remove which selected item" prompt, type the number of the item containing the name of the patient to remove. There is no confirmation.

3.2.3   Health Summary (HS)

To display a health summary, follow these steps:

1. At the "Select Item(s)" prompt, type **HS** and press Enter.

2. At the "Enter Patient Name" prompt, type the name of the patient.

3. At the "Select health summary type name" prompt, type the name of the health summary.

The Output Browser screen displays the Health Summary information for a dental summary type, as below:

```
OUTPUT BROWSER     Dec 19, 2008 12:48:16   Page:  1 of  4
PCC Health Summary for DEMO,CORRINE ALYSE


** CONFIDENTIAL PATIENT INFORMATION -- 12/19/2008 12:48 PM [SJT] **
******* DEMO,CORRINE ALYSE 155243  (DENTAL SUMMARY) pg 1 *******

--------------------- DEMOGRAPHIC DATA ---------------------------

DEMO,CORRINE ALYSE   DOB: NOV 30,1989 19 YRS FEMALE no blood type
DEMO TRIBE, NM     SSN:
            MOTHER'S MAIDEN NAME: ARMACHAIN,JANICE GAYLE
(H) 555-555-8673    FATHER'S NAME: DEMO,HENRY ALLEN
BIRDTOWN (13 MT. NOBLE RD,WHITTIER,NC,28789)


LAST UPDATED: JUN 25,2003   ELIGIBILITY: PENDING VERIFICATION

NOTICE OF PRIVACY PRACTICES REC'D BY PATIENT?
         DATE RECEIVED BY PATIENT:
        WAS ACKNOWLEDGEMENT SIGNED?

+     Enter ?? for more actions                 >>>
+  NEXT SCREEN    -  PREVIOUS SCREEN   Q  QUIT
Select Action: +//
```

Figure 3-5 Sample Health Summary Report

At the "Select Action" prompt, do one of the following:

- Type **Q** (Quit) to quit the screen.

- Type a plus sign (+) to display the next screen. This option is not available for the last screen.

- Type a minus sign (–) to display the previous screen. This option is not available for the first screen.

3.2.4   Change Desg Provider to Another (CP)

Use the CP action to change the designated provider of a selected record to another.

To change a designated provider, follow these steps:

1. At the "Select Item(s)" prompt, type **CP** and press Enter.

2. At the "Change which selected item" prompt, type the number of the item to be changed.

3. At the "Enter New Designated Provider Name" prompt, type the name of the provider.

3.2.5   Resort Display of Patients (ST)

Use the ST action to sort records by patient or by category.

To sort records, follow these steps:

1. At the "Select Item(s)" prompt, type **ST** and press Enter.

2. At the "Enter Type of Lister Display Sort" prompt, type an integer to specify how to sort the records: **1** (By Patient) or **2** (By Category).

3. The screen refreshes displaying the newly sorted list and returns to the "Select Item(s)" prompt.

3.3   Add a New Desig Spec Provider for a Patient (ADD)

Use the ADD option to add a new designated specialty provider record. If the patient has already been assigned an existing provider for the category selected, use the Modify Data Entry Menu (MOD) or the Update One Designated Provider's Patient List (UOP) options to change the existing provider for this patient's category type.

To add a designated specialty provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **ADD** and press Enter.

2. At the "Select Patient Name" prompt, type the name of the patient, or type two question marks (**??**) to display a list of currently assigned providers organized by category.

    The application displays information about the current designated provider for the selected patient, as shown below:

```
            *******************
  **CURRENT DESIGNATED PROVIDERS - BY PROVIDER CATEGORY TYPE**

        Assigned to Patient: DEMO,CORRINE ALYSE
            *******************
   **CATEGORY TYPE**          **CURRENT PROVIDER ASSIGNED**

  1  DESIGNATED PRIMARY PROVIDER    OXPROVIDER,DAMA J
  2  MENTAL HEALTH              KWPROVIDER,BLAKE T
  3  CHEMICAL DEPENDENCY         JKPROVIDER,HILLANE S
  4  CASE MANAGER               <None Currently Assigned>
  5  DIABETES               TQPROVIDER,LIZ
```

Figure 3-6: Sample data about the current designated provider for the patient

3. At the "Do you want to continue with adding a new Designated Provider?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

4. At the "Provider Category" prompt, type the provider category.

5. At the "Select New Designated Provider" prompt, type the name of the provider.

   A summary of the information being added displays.

6. At the "Do you wish to Continue with the Adding of the new Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.4   Modify Existing Desig Spec Provider for a Patient (MOD)

Use the MOD option to modify a patient's existing designated specialty provider records. If the specified provider has already been assigned to the patient for the selected category, the record will not be updated.

To modify a patient's specialty provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **MOD** and press Enter.

2. At the "Select Patient Name" prompt, type the name of the patient.

3. At the "Do you want to continue changing one of the above Designated Providers?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

4. At the "Provider Category" prompt, type the provider category.

5. At the "Select New Designated Provider" prompt, type the name of the provider.

   A summary of the information being changed displays.

6. At the "Do you wish to Continue Changing to a new Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.5   Delete an Individual Patient Record (DREC)

Use the DREC option to delete an existing designated specialty provider for a selected individual patient and provider category type.

To delete a designated specialty provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **DREC** and press Enter.

2. At the "Select Patient Name" prompt, type the name of the patient.

   The current designated providers and category types for the patient are displayed.

3. At the "Do you want to continue Deleting one of the above Designated Providers?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

4. At the "Provider Category" prompt, type the provider category.

   A summary of the information to be changed displays.

5. At the "Do you wish to Continue Deleting the Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.6   Update Provider Records from a Patient Template (TMPU)

Use the TMPU option to automatically add or update records from a patient template. The system prompts for the template name, the provider name, and the provider category type, and then automatically loops through the template of patients and adds or updates the current provider for the selected category type. If an existing patient's current provider and category type are the same as those specified, no update occurs.

To update provider records from a template, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **TMPU** and press Enter.

2. At the "Select Search Template" prompt, type the name of the patient template to be used.

   The number of patient records in the selected template displays.

3. At the "Select New Designated Provider" prompt, type the name of the provider.

4. At the "Do you want to continue changing the Designated Provider for each patient in this Template?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

5. At the "Provider Category" prompt, type the provider category.

   A summary of the information being changed displays.

6. At the "Do you wish to Continue Changing to a new Current Designated Provider?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.7   Delete Provider Records from a Patient Template (TMPD)

Use the TMPD option to automatically delete provider records from a patient template. The system prompts for the template name and provider category type, and then automatically loops through the template of patients and deletes the current

provider for the specified category type. If a patient listed in the template does not currently exist in the management system, no action will be taken.

To delete provider records, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **TMPU** and press Enter.

2. At the "Select Search Template" prompt, type the name of the patient template.

    The number of patient records in the selected template displays.

3. At the "Select Existing Designated Provider" prompt, type the name of the provider.

4. At the "Do you want to continue Deleting the Designated Provider for each patient in this template?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

5. At the "Provider Category" prompt, type the name of the category.

    A summary of the information being changed displays.

6. At the "Do you wish to Continue Deleting the Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.8 Change All of One Provider's Patients to Another (CLOP)

Use the CLOP option to automatically change all records with a specific designated provider to a new designated provider. The system prompts for the old provider name, the new provider name, and the desired provider category type, and then automatically loops through all records and changes them to the new provider for the selected category type. If a patient's existing provider and category types are the same as those specified, no update occurs.

To change all of a provider's records to a new designated provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **TMPU** and press Enter.

2. At the "Select Existing Designated Provider" prompt, type the name of the existing provider. The number of patients assigned to the existing provider displays.

3. At the "Do you want to continue changing the Designated Provider for each Patient?" prompt, type **Y** to continue, or type **N** to return to the "Select Data Entry Menu Option" prompt.

4. At the "Select New Designated Provider" prompt, type the name of the new provider.

5. At the "Provider Category" prompt, type the provider category. A summary of the information being changed displays.

6. At the "Do you wish to Continue Changing to a new Current Designated Provider?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.9   Loop Delete the Current Designated Provider (DLOP)

Use the DLOP option to automatically delete all records for the existing designated provider. After the provider category type has been selected, the program automatically loops through all records and deletes the existing provider for this category type.

To delete the current designated provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **DLOP** and press Enter.

2. At the "Select Existing Designated Provider" prompt, type the name of the existing provider. The number of patients assigned to the provider displays.

3. At the "Do You Want to Continue Deleting the Designated Provider for Each Patient?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

4. At the "Provider Category" prompt, type the provider category. A summary of the information being changed displays.

5. At the "Do You Wish to Continue Deleting the Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.10   Update ALL Patients from One Community to a DP (COMA)

Use the COMA option to automatically update the designated provider for existing patients living in a selected community. The system prompts for the community name, the designated provider name, and the designated provider category type, and then automatically loops through all existing patient records and updates the designated provider for the selected category type. If a patient's current provider, category type, and community are the same as those specified, no update occurs.

To update a community's designated provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **DLOP** and press Enter.

2. At the "Select a Particular Community" prompt, type the name of the community.

3. At the "Select New Designated Provider" prompt, type the name of the new designated provider for that community.

4. At the "Do you want to continue changing the Designated Provider for each Patient living in this Community?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

5. At the "Provider Category" prompt, type the provider category. A summary of the information being changed displays.

6. At the "Do you wish to Continue Deleting the Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.11   Update Records for Unassigned Patient by Category (LUNA)

Use the LUNA option to automatically update all records with no designated provider to a new designated provider. The system prompts only for the new provider name and the provider category type, and then automatically loops through all records with no existing provider and assigns these patients to the new provider for the selected category type.

To update records with no designated provider, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **LUNA** and press Enter.

2. At the "Select Patient Name" prompt, type the name of the patient.

3. At the "Do you want to continue changing the Designated Provider for each Patient?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

4. At the "Select New Designated Provider" prompt, type the name of the provider.

5. At the "Provider Category" prompt, type the provider category. A summary of the information to be changed displays.

6. At the "Do you wish to Continue Updating to a new Current Designated Provider?" prompt, type **Y** (Yes) to display a confirmation message, or type **N** (No) to return to the "Select Data Entry Menu Option" prompt.

3.12   Inquire about a Specific Patient Record (DISP)

Use this option for a quick screen display of the patient's current designated specialty providers. The system prompts for an individual patient's name. The display lists the

specific provider specialty category, along with the date of last recording and the last user who updated the record. If no current provider is assigned to a category, "<None Currently Assigned>" displays.

To display a patient's designated specialty providers, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **DISP** and press Enter.

2. At the "Select Patient Name" prompt, type the name of the patient.

A list of currently assigned providers displays, organized by category as shown below:

```
Select PATIENT NAME: PATIENT,GERTRUDE     F 01-01-1901 000000366 1000000



Designated Providers   Sep 15, 2008 14:11:27  Page:  1 of  1
-------------------------------------------------------------------
Designated Provider List for: PATIENT,GERTRUDE  HRN: DH 100000
-------------------------------------------------------------------
Category                Current Provider     Updated Updated by

DESIGNATED PRIMARY PROVIDER  PROVIDER,ELISTA C    09/15/07 LASTNAME,USER
CASE MANAGER            PROVIDER,MARY S     10/31/07 LASTNAME,USER
WOMEN'S HEALTH CASE MANAGER  DEMO,FRIEDA K      06/30/08
LASTNAME,USER
```

Figure 3-7: Inquiring about a specific patient record

3.13   View History of a Patient's Specialty Providers (DHX)

Use the DHX option to display a detailed history listing of a patient's designated specialty provider for a selected provider category. The system prompts for an individual patient and a provider specialty category, and then displays the current designated specialty provider record along with the old provider history, date of recording, and the user who updated the record.

To display a patient's specialty provider history, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **DHX** and press Enter.

2. At the "Enter Patient Name" prompt, type the name of the patient.

3. At the "Select Item(s)" prompt, type the number of the provider specialty category.

At the "Device" prompt, type the name of the output device to print the report, or press the Enter key to display the report on screen as shown below.

```
ENTER THE PATIENT NAME: PATIENT,GERTRUDE F 01-01-1901 000000366 100000
Designated Providers  Sep 15, 2008 14:18:29  Page:  2 of  0
-------------------------------------------------------------------
Designated Provider List for: PATIENT,GERTRUDE  HRN: DH 100000
```

```
--------------------------------------------------------------------
Category              Current Provider    Updated Updated by
DESIGNATED PRIMARY PROVIDER  BRADLEY,FONDA C    09/03/08 LASTNAME,USER
  History Detail:
  OLD Provider             Updated  Updated by
  PROVIDER,ELISTA C        09/15/07 LASTNAME,USER

  PROVIDER,MARTHA          04/26/08 USER2,FIRSTNAME
  BRADLEY,FONDA C          09/03/08 LASTNAME,USER

CASE MANAGER          DEMO,JEROME        09/15/08 LASTNAME,USER
  History Detail:
  OLD Provider             Updated  Updated by
  PROVIDER,MARY S          10/31/07 LASTNAME,USER
  DEMO,JEROME              09/15/08 LASTNAME,USER

WOMEN'S HEALTH CASE MANAGER  PROVIDER,ELISTA C    08/21/08 USER2,FIRSTNAME
  History Detail:
  OLD Provider             Updated  Updated by
  DEMO,FRIEDA K            06/30/08 LASTNAME,USER
  PROVIDER,ELISTA C        08/21/08 USER2,FIRSTNAME

  OLD PROVIDER: PROVIDER,BILL  12/23/03   USER,DEMO
```

Figure 3-8: Displaying history for a specific patient & category (Sample Report)

3.14   Assign a Message Agent to one Provider's Patients AMA)

This option is used to assign a Message Agent to any patient who has a particular provider assigned to them. For example, if you want to assign message agent Mary Smith, RN to all of Dr. Miller's patients you can do so with this option.

> **Note**: If the patient already has a message agent assigned this option will replace that message agent with the new one you are assigning.

To select the Provider for whose patients you want to assign a message agent, follow these steps:

1. At the "Select Data Entry Menu Option" prompt, type **AMA** and press Enter.

2. At the "Select Provider:, type the name of the provider.

After specifying the provider name, focus returns to the Designated Specialty Provider Management System Data Entry menu

4.0   Reports Menu (RPTS)

The options on the Reports Menu are shown below:

```
            *********************************************
            *           INDIAN HEALTH SERVICE          *
            * DESIGNATED SPECIALTY PROVIDER MGT SYSTEM *
            *          VERSION 1.0, Sep 10, 2004       *
            *********************************************
                          DEMO HOSPITAL
                          Reports Menu


   DISP   Inquire to a Specific Patient Record
   DHX    View History of a Patient's Specialty Providers
   CLST   Print Master Patient Listing By Category (Brief)
   HX     Print Master Patient History By Category
   UPDT   Listing of Records By Date Updated
   PROV   Print Listing By Desg Provider and Date Range
   USER   Print Listing By User Who Created and Date Range
   COML   Print All Records By Community or Residence
   NODP   List of Patients with No Designated Provider
   UPR    Records with No Current Provider Assigned

Select Reports Menu Option:
```

Figure 4-1: Options on the Reports Menu

4.1   Inquire to a Specific Patient Record (DISP)

Use the DISP option to display the designated providers for a specified patient.

To display a patient's designated providers, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **DISP** and press Enter.

2. At the "Enter Patient Name" prompt, type the patient name.

The application displays the Designated Providers screen, as shown below:

```
Designated Providers  Dec 19, 2008 15:41:19  Page:  1 of  1
----------------------------------------------------------------------
Designated Provider List for: DEMO,CORRINE ALYSE  HRN: DH 155243
----------------------------------------------------------------------
Category              Current Provider     Updated Updated by

DESIGNATED PRIMARY PROVIDER  OXPROVIDER,DAMA J    12/19/08 THETA,SHIRLEY
MENTAL HEALTH          KWPROVIDER,BLAKE T    11/14/08 GAMMA,CIN
CHEMICAL DEPENDENCY      JKPROVIDER,HILLANE S   11/10/08 GAMMA,CIN
CASE MANAGER                       11/14/08 GAMMA,CIN
DIABETES              TQPROVIDER,LIZ      11/10/08 GAMMA,CIN
```

```
Select Item(s): Quit//
```

Figure 4-2: Sample Designated Providers for a patient

4.2   Display History for a Specific Patient & Category (DHX)

Use the DHX option to display a history of designated providers and categories for a specified patient.

To display a patient's designated provider history, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **DISP** and press Enter.

2. At the "Enter Patient Name" prompt, type the patient name.

The application displays the Designated Providers screen, as shown below:

```
Designated Providers  Dec 19, 2008 15:44:54  Page:  1 of  0
---------------------------------------------------------------------
Designated Provider List for: DEMO,CHRISTA DANIELLE  HRN: DH 172684
---------------------------------------------------------------------
Category               Current Provider     Updated Updated by

SOCIAL SERVICES         PVPROVIDER,JEROME    12/19/08 TETER,SHIRLEY
  History Detail:
  OLD Provider                 Updated    Updated by
  PVPROVIDER,JEROME               12/19/08 TETER,SHIRLEY

RENAL DISEASE                   12/19/08 TETER,SHIRLEY
  History Detail:
  OLD Provider                 Updated    Updated by
  SCPROVIDER,ONE               12/19/08 THETA,SHIRLEY
  THETA,SHIRLEY                12/19/08 THETA,SHIRLEY




Select Item(s): Quit//
```

4.3   Print Master Patient Listing By Category (Brief) (CLST)

Use the CLST option to display a report listing of all records, subtotaled by the current specialty provider category. The report displays the category, patient name, last current provider, and the date last updated. This report does not include patients who are inactive.

To display a list of patients by provider category, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **CLST** and press Enter.

2. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
BDP DESG SPECIALTY PROVIDER LIST    DEC 19,2008 15:46  PAGE 1
                          LAST CURRENT
PROVIDER CATEGORY   PATIENT NAME        PROVIDER       UPDATED
--------------------------------------------------------------------


CANCER         ANDERSON,SONYA M      ETEST,JENNIFER J   11/25/08
--------------------
SUBCOUNT 1

CASE MANAGER     ALPHA,CHI            VTEST,JOY A      12/12/08
CASE MANAGER     ASHE,MELINDA         EIPROVIDER,USER    09/03/08
CASE MANAGER     BROWN,EDITH LAVERNE   PVPROVIDER,JEROME   09/15/08
CASE MANAGER     CATOLSTER,FREDDIE     SPAULDING,MARY R   07/08/08
CASE MANAGER     DEMO,CORRINE ALYSE                 11/14/08
CASE MANAGER     FRIES,BETTYE JO      STEST,MARTHA     10/17/08
CASE MANAGER     SMITH,ANGELA         EWPROVIDER,AMANDA D 03/05/08
--------------------
SUBCOUNT 7
```

Figure 4-3: Printing Master Patient Listing by Category (Brief)

4.4   Print Master Patient History By Category (HX)

Use the HX option to produce a report listing a detailed history of a patient's selected designated specialty provider. The report is sorted by the provider category, with each patient listed for each category. The current designated specialty provider record displays the old provider history, date of recording, and the user who updated the record. This report does not include patients who are inactive.

To list the history of a patient's designated specialty providers, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **HX** and press Enter.

2. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
BDP DESG SPECIALTY PROVIDER LIST    JAN 30,2004 15:29  PAGE 1
--------------------------------------------------------------------
    PROVIDER CATEGORY: CASE MANAGER
PATIENT NAME: PATIENT,GERTRUDE        HEALTH RECORD: 100006
PROVIDER CATEGORY: CASE MANAGER


    CURRENT PROVIDER: PROVIDER,BILL
    DATE UPDATED: 12/23/03  USER UPDATED:  PROVIDER,LORI
  HISTORY DETAIL:
  OLD PROVIDER: PROVIDER,GREGORY  10/15/03   PROVIDER,LORI
  OLD PROVIDER: PROVIDER,JOE     10/15/03   PROVIDER,LORI
  OLD PROVIDER: PROVIDER,DONN    10/15/03   PROVIDER,LORI
```

```
   OLD PROVIDER: PROVIDER,BILL   12/23/03   PROVIDER,LORI


     PROVIDER CATEGORY: CHEMICAL DEPENDENCY
 PATIENT NAME: PATIENT,NATALIE         HEALTH RECORD: 100001
 PROVIDER CATEGORY: CHEMICAL DEPENDENCY
      CURRENT PROVIDER:
      DATE UPDATED: 12/22/03  USER UPDATED: PROVIDER,LORI
   HISTORY DETAIL:
   OLD PROVIDER: PROVIDER,DAVID   12/22/03   PROVIDER,LORI
     PROVIDER CATEGORY: DESIGNATED PRIMARY PROVIDER

 PATIENT NAME: PATIENT,HELEN        HEALTH RECORD: 100001
 PROVIDER CATEGORY: DESIGNATED PRIMARY PROVIDER
      CURRENT PROVIDER:
      DATE UPDATED: 01/21/04  USER UPDATED: PROVIDER,LORI
   HISTORY DETAIL:
   OLD PROVIDER: PROVIDER,DAVID   11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 12/22/03   PROVIDER,LORI

 PATIENT NAME: PATIENT,MELANIE         HEALTH RECORD: 100000
 PROVIDER CATEGORY: DESIGNATED PRIMARY PROVIDER
      CURRENT PROVIDER:PROVIDER,GREGORY
      DATE UPDATED: 01/21/04  USER UPDATED: PROVIDER,LORI
   HISTORY DETAIL:
   OLD PROVIDER: PROVIDER,DAVID   11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 12/22/03   PROVIDER,LORI

 PATIENT NAME: PATIENT,MOLLY         HEALTH RECORD: 100000
 PROVIDER CATEGORY: DESIGNATED PRIMARY PROVIDER
      CURRENT PROVIDER: PROVIDER,GREGORY
      DATE UPDATED: 01/21/04  USER UPDATED: PROVIDER,LORI
   HISTORY DETAIL:
   OLD PROVIDER: PROVIDER,DAVID   11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 11/26/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 12/22/03   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,BILL    01/21/04   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,DAVID   01/21/04   PROVIDER,LORI
   OLD PROVIDER: PROVIDER,GREGORY 01/21/04   PROVIDER,LORI
```

Figure 4-4: Master patient history by category

4.5   Listing of Records By Date Updated (UPDT)

Use the UPDT option to display a report listing records updated for a user in a specified date range. The report output includes the category type, patient name, current provider, and date of last update. This report does not include patients who are inactive.

To list updated records, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **UPDT** and press Enter.

2. At the "Enter beginning Update Date" prompt, type the beginning date of the date range.

3. At the "Enter ending Update Date" prompt, type the ending date of the date range.

4. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
BDP DESG SPECIALTY PROVIDER LIST    DEC 19,2008 15:54  PAGE 1
                         LAST CURRENT
PROVIDER CATEGORY   PATIENT NAME        PROVIDER       UPDATED
---------------------------------------------------------------------

CHEMICAL DEPENDENCY  CAMPBELL,DAVID ALVIN    GEBREMARIAM,CINDY   11/25/08
CANCER         ANDERSON,SONYA M       ETEST,JENNIFER J  11/25/08
CHEMICAL DEPENDENCY  BAKER,MARJORIE LANIER   QFPROVIDER,RUSSELL P 12/04/08
PUBLIC HEALTH NURSE  BAKER,MARJORIE LANIER   STEST,JANET O     12/08/08
PUBLIC HEALTH NURSE  LEDFORD,ETHEL L       BPROVIDER,JEAN C   12/12/08
WOMEN'S HEALTH CASE  ALPHA,CHI          RAY,KATHY R      12/12/08
CASE MANAGER     ALPHA,CHI         VTEST,JOY A     12/12/08
DESIGNATED PRIMARY P BROWN,ESIAH        TXPROVIDER,FRANKLIN  12/18/08
DESIGNATED PRIMARY P DEMO,CORRINE ALYSE     OXPROVIDER,DAMA J   12/19/08
HOME CARE       DEMO,BIANCA SHOOK             12/19/08
DIABETES       DEMO,JOHNNIE RUTH     TETER,SHIRLEY     12/19/08
DIABETES       DEMO,BIANCA SHOOK     TETER,SHIRLEY     12/19/08
RENAL DISEASE     DEMO,CHRISTA DANIELLE          12/19/08
SOCIAL SERVICES    DEMO,CHRISTA DANIELLE  PVPROVIDER,JEROME   12/19/08
DESIGNATED PRIMARY P DEMO,KYLE VANCE       OXPROVIDER,DAMA J   12/19/08
--------------------
COUNT 15
```

Figure 4-5: Listing of Records By Date Updated

4.6   Print Listing By Desg Provider and Date Range (PROV)

Use the PROV option to produce a report listing records updated for a specific date range and current designated provider. The report output includes the category type, patient name, current provider, and date last updated.

1. To list updated records for a specified date range, follow these steps:

2. At the "Select Reports Menu Option" prompt, type **UPDT** and press Enter.

3. At the "Enter beginning Update Date" prompt, type the beginning date of the date range.

4. At the "Enter ending Update Date" prompt, type the ending date of the date range.

5. At the "Want to Include a particular Current Designated Provider?" prompt, type **Y** (Yes) or **N** (No). If the user types **Y** (Yes) at this prompt, the "Enter Provider Name" prompt displays. Type the provider name.

6. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
BDP DESG SPECIALTY PROVIDER LIST    DEC 19,2008 16:00  PAGE 1
                       LAST CURRENT
PROVIDER CATEGORY   PATIENT NAME         PROVIDER       UPDATED
-----------------------------------------------------------------

CANCER          ANDERSON,SONYA M     ETEST,JENNIFER J   11/25/08
PUBLIC HEALTH NURSE  LEDFORD,ETHEL L     BPROVIDER,JEAN C   12/12/08
DESIGNATED PRIMARY P DEMO,CORRINE ALYSE    OXPROVIDER,DAMA J  12/19/08
DESIGNATED PRIMARY P DEMO,KYLE VANCE       OXPROVIDER,DAMA J  12/19/08
DIABETES       PSI,DELTA          TQPROVIDER,LIZ   11/10/08
DIABETES        DEMO,CORRINE ALYSE    TQPROVIDER,LIZ   11/10/08
CHEMICAL DEPENDENCY  BAKER,MARJORIE LANIER   QFPROVIDER,RUSSELL P 12/04/08
CHEMICAL DEPENDENCY  PSI,DELTA          CVPROVIDER,JAMES R  11/10/08
CHEMICAL DEPENDENCY  DEMO,CORRINE ALYSE    JKPROVIDER,HILLANE S 11/10/08
CASE MANAGER      ALPHA,CHI        VTEST,JOY A       12/12/08
PUBLIC HEALTH NURSE  BAKER,MARJORIE LANIER   STEST,JANET O    12/08/08
DESIGNATED PRIMARY P BROWN,ESIAH        TXPROVIDER,FRANKLIN  12/18/08
SOCIAL SERVICES    DEMO,CHRISTA DANIELLE  PVPROVIDER,JEROME   12/19/08
MENTAL HEALTH     PSI,DELTA          KWPROVIDER,BLAKE T  11/14/08
MENTAL HEALTH     DEMO,CORRINE ALYSE    KWPROVIDER,BLAKE T  11/14/08

CHEMICAL DEPENDENCY  CAMPBELL,DAVID ALVIN   GEBREMARIAM,CINDY   11/25/08
DIABETES        DEMO,JOHNNIE RUTH    TETER,SHIRLEY     12/19/08
DIABETES        DEMO,BIANCA SHOOK    TETER,SHIRLEY     12/19/08
WOMEN'S HEALTH CASE  ALPHA,CHI        RAY,KATHY R     12/12/08
--------------------
COUNT 19
```

Figure 4-6: Printing a Listing by Designated Provider and Date Range

4.7   Print Listing by Updating User and Date Range (USER)

Use the USER option to produce a report that lists the records updated for a specific date range and updating user. The report output includes the category type, patient name, current provider, date, and the user who made the update.

To print a listing for a particular user and date range, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **USER** and press Enter.

2. At the "Enter beginning Update Date" prompt, type the beginning date of the date range.

3. At the "Enter ending Update Date" prompt, type the ending date of the date range.

4. At the "Want to Include a particular User Who Updated Record?" prompt, type **Y** (Yes) to continue, or type **N** (No). If the user typed **Y** (Yes), type the user name at the "Enter User Name" prompt.

5. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below:

```
LISTING BY USER UPDATE          JAN 30,2004 15:42  PAGE 1
              LAST CURRENT
CATEGORY PATIENT NAME   PROVIDER     UP DT   USER UPDT
-----------------------------------------------------------------

DPCP   PATIENT,MICHELLE BPPROVIDER,FRAN 01/21/04  PROVIDER,LORI
DPCP   PATIENT,SHARLENE         01/21/04  PROVIDER,LORI
DPCP   PATIENT,DALE             01/21/04  PROVIDER,LORI
DPCP   PATIENT,MADGE            01/21/04  PROVIDER,LORI
DPCP   PATIENT,TONI             01/21/04  PROVIDER,LORI
DPCP   PATIENT,MARLEY           01/21/04  PROVIDER,LORI
DPCP   PATIENT,SHANNON          01/21/04  PROVIDER,LORI
DPCP   PATIENT,KAIA             01/21/04  PROVIDER,LORI
DPCP   PATIENT,MARLEY           01/21/04  PROVIDER,LORI
DPCP   PATIENT,CLAUDIA          01/21/04  PROVIDER,LORI
DPCP   PATIENT,YVONNE           01/21/04  PROVIDER,LORI


DPCP   PATIENT,GRETCHEN         01/21/04  PROVIDER,LORI
DPCP   PATIENT,AMY LYNN         01/21/04  PROVIDER,LORI
DPCP   PATIENT,PAMELA           01/21/04  PROVIDER,LORI
DPCP   PATIENT,HELEN            01/21/04  PROVIDER,LORI
DPCP   PATIENT,LAVERNE          01/21/04  PROVIDER,LORI
DPCP   PATIENT,GEORGIA          01/21/04  PROVIDER,LORI
DPCP   PATIENT,CONNIE           01/21/04  PROVIDER,LORI
```

Figure 4-7: Printing Listing by Updating User and Date Range

4.8   Print All Records by Community of Residence (COML)

Use the COML option to produce a report that shows all records sorted by the patient's current community of residence. Within each community listed, the report displays each patient's provider category, the current designated specialty provider, and the date last updated.

To list all records by community of residence, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **COML** and press Enter.

2. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below:

```
LISTING BY COMMUNITY            JAN 30,2004 15:46  PAGE 1
   PROVIDER
   CATEGORY   PATIENT NAME     CURRENT PRV     UPDT DT
-----------------------------------------------------------------
  CURRENT COMMUNITY: 5 MILE WASH
   SOCIAL SER PATIENT,MIRIAM    PROVIDER,BILL    12/29/03
   DESIGNATED PATIENT,ERNEST               10/17/03
   DESIGNATED PATIENT,ERNEST               10/17/03
   SOCIAL SER PATIENT,COLLEEN   PROVIDER,BILL    12/29/03
     ----------
SUBCOUNT 4

  CURRENT COMMUNITY: BABY ROCKS
   SOCIAL SER PATIENT,PAUL      PROVIDER,BILL    12/29/03
```

```
        SOCIAL SER PATIENT,FRANCES    PROVIDER,BILL    12/29/03
        SOCIAL SER PATIENT,SARAH      PROVIDER,BILL    12/29/03
        MENTAL HEA PATIENT,SARAH      PROVIDER,BILL
        MENTAL HEA PATIENT,SARAH
          ----------
    SUBCOUNT 5

      CURRENT COMMUNITY: BIG MOUNTAIN
        MENTAL HEA PATIENT,ANNE
        SOCIAL SER PATIENT,JEANINE    PROVIDER,BILL    12/29/03
        DESIGNATED PATIENT,SHARLENE                 01/21/04

        SOCIAL SER PATIENT,SHARLENE                 12/22/03
        WOMENS HEA PATIENT,SHARLENE                 12/01/03
        DESIGNATED PATIENT,MINDY                    12/29/03
        WOMENS HEA PATIENT,MINDY      PROVIDER,JOE    12/29/03
        SOCIAL SER PATIENT,MINDY      PROVIDER,BILL    12/29/03
        RENAL DISE PATIENT,MINDY
        OB CARE    PATIENT,MINDY      PROVIDER,LORI    12/29/03
        MENTAL HEA PATIENT,MINDY      PROVIDER,DAVID   12/29/03
        SOCIAL SER PATIENT,EDWARD     PROVIDER,BILL    12/29/03
    SUBCOUNT 12

    TOTAL COUNT 21
```

Figure 4-8: Printing All Records by Community of Residence

4.9   List of Patients with No Designated Provider (NODP)

Use the NODP option to produce a list of patients with no designated provider
assigned. You can run this report on a selected set of patients or on a search template
of patients.

```
                        2010 DEMO HOSPITAL
        PATIENTS WITH NO DESIGNATED PRIMARY PROVIDER DESIGNATED PROVIDER


                                        CURRENT
NAME                    DOB             HRN      COMMUNITY      LAST VISIT
-------------------------------------------------------------------------------
TEST, PWH               NOV 10, 1972    8257     TUCSON         SEP 12, 2011
TEST,ADAM               MAR 08, 1980    732898   TUCSON         NOV 29, 2011
TEST,BABY               AUG 01, 2010    7543     TUCSON         NOV 29, 2011
TEST,BARBA              FEB 13, 1955    28900    TUCSON         DEC 05, 2011
TEST,CAROLE             DEC 16, 1991    128897   TUCSON         NOV 15, 2011
TEST,CHLOE              MAR 15, 1982    808      TUCSON         NOV 17, 2011
TEST,CKD                FEB 22, 1965    8150     TUCSON         DEC 14, 2011
TEST,DBABY              OCT 10, 2011    23666    TUCSON         DEC 14, 2011
TEST,DONNA              FEB 17, 1980    189898   TUCSON         DEC 12,
```

Figure 4-9: Example of List of patients without a Designated Primary Provider

4.10   Records with No Current Provider Assigned (UPR)

Use the UPR option to produce a report that lists all patient records for which no current provider is assigned. The report lists the provider categories and the patients within each category who have no current provider assigned.

> **Note:** To assign providers to records with no current provider, use the data entry menu option LUNA-Update Records for Unassigned Patients by Category.

To list patients with no provider assigned, follow these steps:

1. At the "Select Reports Menu Option" prompt, type **UPR** and press Enter.

2. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
UNASSIGNED PATIENT RECORDS        MAR 2,2004 14:57  PAGE 1
                    LAST
PROVIDER                  CURRENT
CATEGORY       PATIENT NAME     PROVIDER
-----------------------------------------------------------------
CHEMICAL DEPEND PATIENT,GERTRUDE   No Provider Currently Assigned

DESIGNATED PRIM  PATIENT,ERNEST   No Provider Currently Assigned
DESIGNATED PRIM  PATIENT,BLAIR    No Provider Currently Assigned

WOMENS HEALTH   PATIENT,GERTRUDE  No Provider Currently Assigned
```
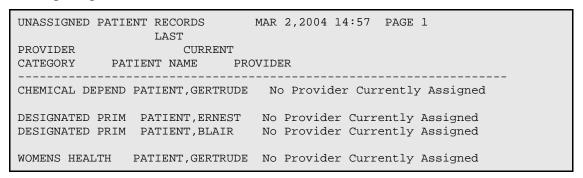
Figure 4-10: Records with No Current Provider Assigned

5.0   Manager Menu (MGR)

The options on the Manager Menu are shown below:

```
         *********************************************
         *         INDIAN HEALTH SERVICE         *
         * DESIGNATED SPECIALTY PROVIDER MGT SYSTEM *
         *         VERSION 1.0, Sep 10, 2004         *
         *********************************************
                      DEMO HOSPITAL
                      Manager Menu



  CAT   Add/Edit Provider Categories
  LIST  Print Listing of Provider Categories

Select Manager Menu Option:
```

Figure 5-1: Option on Manager Menu

5.1   Add/Edit Provider Categories (CAT)

Use the CAT option to add or edit provider categories in the Specialty Category list.

To add or edit provider categories, follow these steps:

1. At the "Select Manager Menu Option" prompt, type **CAT** and press Enter.

2. At the "Select BDP DESG SPEC PROV CATEGORY NAME" prompt, type the name of the category.

    -   If the name is an existing category, the name displays followed by "No Editing."

    -   If the name is a new category, at the "Are you adding '(new category name)' as a new DBP DESG SPEC PROV CATEGORY (the [xx TH])?" prompt, type **Y** (Yes) to continue, or type **N** (No) to return to the "Select Manager Menu Option" prompt.

3. At the "MNEMONIC" prompt, type the mnemonic for the category.

Subsequent prompts depend on the mnemonic selected.

```
Select BDP DESG SPEC PROV CATEGORY NAME: CANCER MANAGER

 Are you adding 'CANCER MANAGER' as a new BDP DESG SPEC PROV CATEGORY the
11TH)? No// Y (Yes)
BDP DESG SPEC PROV CATEGORY MNEMONIC: CM
```

Figure 5-2: Adding local provider categories example

```
Select BDP DESG SPEC PROV CATEGORY NAME: cancer      CA
NAME: CANCER//  (No Editing)
MNEMONIC: CA//
WOMEN'S HEALTH RELATED?: ??

   Choose from:
    1    YES
    0    NO
WOMEN'S HEALTH RELATED?: 0 NO
DISPLAY ON HEALTH SUMMARY?: ??

   Choose from:
    Y    YES
    N    NO
DISPLAY ON HEALTH SUMMARY?: y YES

Select BDP DESG SPEC PROV CATEGORY NAME:
```

Figure 5-3: Example of editing an existing local provider category

5.2   Print Listing of Provider Categories (LIST)

Use the LIST option to print a list of provider categories.

To list provider categories, follow these steps:

1. At the "Select Manager Menu Option" prompt, type **CAT** and press Enter.

2. At the "Start With Name" prompt, press Enter.

3. At the "Device" prompt, type the name of the output device to print the report, or press Enter to display the report on screen as shown below.

A sample report is shown below.

```
BDP DESG SPEC PROV CATEGORY LIST    MAR 16,2004 11:35  PAGE 1
NAME              MNEMONIC FILE LINK NAME
---------------------------------------------------------------------

CANCER            CA
CASE MANAGER          CM
CHEMICAL DEPENDENCY       CD    MHSS PATIENT DATA
DESIGNATED PRIMARY PROVIDER   DPCP    PATIENT
DIABETES            DM
Domestic Violence       DV
HIV CASE MANAGER        HIVC
HIV PROVIDER         HIVP
HMD DIABETES CLINIC       HMDD
HOME CARE           HC
MENTAL HEALTH         MH    MHSS PATIENT DATA
OB CARE            OB
```

```
PHYSICIAN ONLY           MDO
RENAL DISEASE            RD


SNOWBIRD PROVIDER         SB
SOCIAL SERVICES          SS    MHSS PATIENT DATA
WOMENS HEALTH CASE MANAGER   WH    BW PATIENT
```

Figure 5-4: Example of provider categories report

Appendix A: Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is ***FOR OFFICIAL USE ONLY***. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).

- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site: http://security.ihs.gov/.

The ROB listed in the following sections are specific to RPMS.

A.1   All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1   Access

RPMS users shall

- Only use data for which you have been granted authorization.

- Only give information to personnel who have access authority and have a need to know.

- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.

- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not

- Retrieve information for someone who does not have authority to access the information.

- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.

- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.

- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2   Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.

- Acquire a written preauthorization in accordance with IHS polices and procedures prior to interconnection to or transferring data from RPMS.

A.1.3   Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.

- Log out of the system whenever they leave the vicinity of their personal computers (PCs).

- Be alert to threats and vulnerabilities in the security of the system.

- Report all security incidents to their local Information System Security Officer (ISSO)

- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.

- Protect all sensitive data entrusted to them as part of their government employment.

- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4   Confidentiality

RPMS users shall

- Be aware of the sensitivity of electronic and hard copy information, and protect it accordingly.

- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.

- Erase sensitive data on storage media prior to reusing or disposing of the media.

- Protect all RPMS terminals from public viewing at all times.

- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.

- Store sensitive files on a portable device or media without encrypting.

A.1.5   Integrity

RPMS users shall

- Protect their systems against viruses and similar malicious programs.

- Observe all software license agreements.

- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.

- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not

- Violate federal copyright laws.

- Install or use unauthorized software within the system libraries or folders.

- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6   System Logon

RPMS users shall

- Have a unique User Identification/Account name and password.

- Be granted access based on authenticating the account name and password entered.

- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7   Passwords

RPMS users shall

- Change passwords a minimum of every 90 days.

- Create passwords with a minimum of eight characters.

- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.

- Change vendor-supplied passwords immediately.

- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).

- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.

- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not

- Use common words found in any dictionary as a password.

- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).

- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.

- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.

- Post passwords.

- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.

- Give a password out over the phone.

A.1.8   Backups

RPMS users shall

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.

- Make backups of systems and files on a regular, defined basis.

- If possible, store backups away from the system in a secure environment.

A.1.9   Reporting

RPMS users shall

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.

- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10   Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11   Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).

- Keep an inventory of all system equipment.

- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

A.1.12   Awareness

RPMS users shall

- Participate in organization-wide security training as required.

- Read and adhere to security information pertaining to system hardware and software.

- Take the annual information security awareness.

- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13   Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.

- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.

- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.

- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.

- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

A.2   RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.

- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.

- Only access information or code within the namespaces for which they have been assigned as part of their duties.

- Remember that all RPMS code is the property of the U.S. Government, not the developer.

- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.

- Observe separation of duties policies and procedures to the fullest extent possible.

- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.

- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.

- Follow industry best standards for systems they are assigned to develop or maintain, and abide by all Department and Agency policies and procedures.

- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.

- Grant any user or system administrator access to RPMS unless proper documentation is provided.

- Release any sensitive agency or patient information.

A.3   Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.

- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.

- Advise the system owner on matters concerning information technology security.

- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.

- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.

- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.

- Verify that users have received appropriate security training before allowing access to RPMS.

- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.

- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.

- Protect the supervisor, superuser, or system administrator passwords.

- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).

- Watch for unscheduled, unusual, and unauthorized programs.

- Help train system users on the appropriate use and security of the system.

- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.

- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.

- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.

- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.

- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties

- Grant any user or system administrator access to RPMS unless proper documentation is provided.

- Release any sensitive agency or patient information.

Glossary

Community

Patients are grouped by the communities in which they live. This grouping can be used to perform mass updates to patient records.

Device

The printer the report is sent to for printing. The device can also be the terminal screen.

Fields

Fields are a collection of related information that makes up a record. Fields on a display screen function like blanks on a form. For each field, a prompt displays to enter a specific type of data. There are nine basic field types in RPMS programs, each of which collects a specific type of information.

ListMan

A specific format of system interface. Information is presented in lists that are followed by a menu of action options

Loop

The system process that scans all records. Usually refers to mass updates of a specific set of data.

Mnemonic

An abbreviation used to name an option or report used in the RPMS packages.

Prompt

The phrase or word(s) used to indicate that input is required from the user.

Site Specific Categories

Categories of providers that are not included in the 10 standard provider categories already loaded in the Designated Specialty Provider package.

Standard Treating Specialty Categories

The 10 standard categories of care already loaded in the Designated Specialty Provider package.

Contact Information

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

Phone: (888) 830-7280 (toll free)

Web: http://www.ihs.gov/helpdesk/

Email: support@ihs.gov