RESOURCE AND PATIENT MANAGEMENT SYSTEM

# IHS Personal Health Record

# (BPHR)

# Installation Guide and Release Notes

Version 2.1
September 2014

# Table of Contents

# Preface

The purpose of this manual is to provide installation information for the Personal Health Record (BPHR) package. The BPHR package is designed to enable verified patients to request and view their Resource and Patient Management System (RPMS) data online.

# 1.0    Release Notes

This is the first release of the Personal Health Record (PHR) application. The PHR is an on-line health record, accessible to patients, containing their medical history. Examples of items contained in a PHR are: clinical and hospital visits, laboratory results, medication history, chronic diseases, etc. BPHR enables patients to access their medical history to manage their health care. As a Meaningful Use (MU) stage two certification requirement, a Performance measure needs to know if a patient logged onto the PHR and if a patient used secure messaging.

# 2.0    Installation Notes

**Prefix**: BPHR
**Current Version**: 2.1

> **Note**:   Read entire notes file prior to attempting any installation.

- All patches to Version 2.1 will be cumulative

- Make a copy of this distribution for offline storage.

- Print all notes and readme files.

- It is recommended that terminal output during the Kernel Installation and Distribution System (KIDS) installation be captured using an auxport printer attached to the terminal at which the user is performing the software installation or using a screen capture. This capture combined with the KIDS entry in the INSTALL file will ensure a printed audit trail should any problems arise.

## 2.1    Contents of Distribution

| File | Description |
|------|-------------|
| bphr0210.k | KIDS file |
| bphr021i.pdf | Installation Guide and Release notes |
| bphr021u.pdf | User Manual |
| bphr021t.pdf | Technical Manual |

## 2.2    Required Resources

| Module/Software | Minimum Version |
|-----------------|-----------------|
| InterSystems Ensemble | v2012 or later |
| VA FileMan (DI) | v22.0 Patch 1003 or later |
| VA Kernel (XU) | v8.0 Patch 1015 or later |

## 2.3    Before You Begin: Installation Issues

### 2.3.1    BPHR Web Service

During the installation process, the connection information to the Personal Health Record server will be automatically included. A menu option has been provided to change this information if it becomes necessary in the future.

## 2.3.2    BPHR Package – Central Processing Unit (CPU) Capacity

The BPHR Application Programming Interface (API) calls should not have a noticeable impact on the CPU capacity.

# 3.0     Installation Instructions

## 3.1     Pre-KIDS Installation Setup Configuration

There are no special RPMS pre-KIDS installation setup configuration needed.

## 3.2     KIDS Installation Instructions

This section details the steps required to install the BPHR KIDS package. This is a new package with new routines, so there should not be anything on the system to back up or compare.

Also, no options need to be taken out of service because the components to be added will not be directly added to any existing options.

### 3.2.1     Pre-Installation

If possible, initially load the software into a test account, then into the production account. There are no routines or globals to remove after the installation is complete.

### 3.2.2     BPHR Installation

1. From the **KIDS** menu, select the **Installation** menu.

2. From the **XPD Main > Installation** menu, select **Option 1: Load a Distribution**.

3. Type **bphr0210.k** at the "Enter a Host File" prompt. Please note the file path might need to precede the file name with the appropriate host path. This is the file to retrieve from the appropriate software directory.

4. Type **Yes** (or press ENTER to accept the default) at the "Want to Continue with Load? YES//" prompt.

5. KIDS file bphr0210.k contains the following installation file:

    IHS PERSONAL HEALTH RECORD 2.1

6. From the **Installation** menu, select **Option 2: Verify Checksums in Transport Global**. This option provides a mechanism for ensuring the integrity of your routines. This step verifies checksums for the components of the Transport global, and reports any errors uncovered.

7. Type **IHS PERSONAL HEALTH RECORD 2.1** as the install name.

Optional: At this time, you can elect to exercise one of the following installation options. If you elect to use one of these, use **IHS PERSONAL HEALTH RECORD 2.1** as the install name.

a. Back Up a Transport Global – this option creates a MailMan message that will back up all current routines on the system that would be replaced by this release. (Because this is a new release no files will be replaced.).

b. Compare Transport Global – this option allows you to view all changes that will result from the installation of this patch and compares them with the values currently loaded on the system (routines, data dictionaries, templates, etc.).

8. From the **Installation** menu, select the **Install Packages(s)** option.

9. At the **Select Install Name** prompt, type **IHS PERSONAL HEALTH RECORD 2.1.**

10. Respond to the following prompts as indicated:

a. At the "Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//" prompt, type **NO**.

b. At the "Want KIDS to INHIBIT LOGONs during the install?//YES" prompt, type **NO**.

c. At the "Want to DISABLE Scheduled Options, Menu Options and Protocols?// YES**"** prompt, type **NO**.

11. Type the device that will print the install messages.

12. Exit the **Installation** menu.

## 3.2.3    PHR Web Service

The installation includes the PHR web service information. As part of the install, a menu option has been imported if it ever becomes necessary to change any information on how to connect to the PHR server. Instructions will be given on how to use this option.

# 4.0    Sample Installation

## 4.1    Sample Cache Install

> **Note**:   User responses appear in bold type.

```
Select OPTION NAME: XPD MAIN        Kernel Installation & Distribution System

          Edits and Distribution ...
          Utilities ...
          Installation ...
          Patch Monitor Main Menu ...

You have 4 PENDING ALERTS
          Enter  "VA to jump to VIEW ALERTS option

Select Kernel Installation & Distribution System Option: Installation
Select Installation Option: 1  Load a Distribution
Enter a Host File: D:\PUB\bphr0210.t1k
KIDS Distribution saved on Apr 01, 2014@10:45:24
Comment: IHS PERSONAL HEALTH RECORD RPMS Version 2.1
This Distribution contains Transport Globals for the following Package(s):
   IHS PERSONAL HEALTH RECORD 2.1
Distribution OK!
Want to Continue with Load? YES//
Loading Distribution...
Build IHS PERSONAL HEALTH RECORD 2.1 has an Environmental Check Routine
Want to RUN the Environment Check Routine? YES//
   IHS PERSONAL HEALTH RECORD 2.1
Will first run the Environment Check Routine, BPHR1POS
Use INSTALL NAME: IHS PERSONAL HEALTH RECORD 2.1 to install this Distribution.


   1        Load a Distribution
   2        Verify Checksums in Transport Global
   3        Print Transport Global
   4        Compare Transport Global to Current System
   5        Backup a Transport Global
   6        Install Package(s)
            Restart Install of Package(s)
            Unload a Distribution

You have 4 PENDING ALERTS
          Enter  "VA to jump to VIEW ALERTS option

Select Installation Option: 2  Verify Checksums in Transport Global
Select INSTALL NAME:   IHS PERSONAL HEALTH RECORD 2.1     Loaded from Distribution
Loaded from Distribution  4/1/14@10:46
    => IHS PERSONAL HEALTH RECORD RPMS Version 2.1  ;Created on Apr 01, 2014@
This Distribution was loaded on Apr 01, 2014@10:46 with header of
   IHS PERSONAL HEALTH RECORD RPMS Version 2.1  ;Created on Apr 01, 2014@10:45:24
   It consisted of the following Install(s):
IHS PERSONAL HEALTH RECORD 2.1
Want each Routine Listed with Checksums: Yes//   YES
DEVICE: HOME//   VT
PACKAGE: IHS PERSONAL HEALTH RECORD 2.1     Apr 01, 2014 10:46 am     PAGE 1
-------------------------------------------------------------------------------
```

```
BPHR1POS   Calculated      808378
BPHRCLAS   Calculated    21622955
BPHRMUPM   Calculated     6356675
BPHRUPD    Calculated      323896
   4 Routines checked, 0 failed.


   1        Load a Distribution
   2        Verify Checksums in Transport Global
   3        Print Transport Global
   4        Compare Transport Global to Current System
   5        Backup a Transport Global
   6        Install Package(s)
            Restart Install of Package(s)
            Unload a Distribution


You have 4 PENDING ALERTS
            Enter  "VA to jump to VIEW ALERTS option


Select Installation Option: 6  Install Package(s)
Select INSTALL NAME:    IHS PERSONAL HEALTH RECORD 2.1     Loaded from Distribution
Loaded from Distribution  4/1/14@10:46
     => IHS PERSONAL HEALTH RECORD RPMS Version 2.1  ;Created on Apr 01, 2014@
This Distribution was loaded on Apr 01, 2014@10:46 with header of
   IHS PERSONAL HEALTH RECORD RPMS Version 2.1  ;Created on Apr 01, 2014@10:45:24
   It consisted of the following Install(s):
IHS PERSONAL HEALTH RECORD 2.1
Checking Install for Package IHS PERSONAL HEALTH RECORD 2.1
Will first run the Environment Check Routine, BPHR1POS
Install Questions for IHS PERSONAL HEALTH RECORD 2.1
Incoming Files:
   90670.2   BPHR WEB SERVICE  (including data)
Note:  You already have the 'BPHR WEB SERVICE' File.
I will OVERWRITE your data with mine.
   90670.5   BPHR CLASS TRANSPORT  (including data)
Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//
Want KIDS to INHIBIT LOGONs during the install? NO//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//
Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.
DEVICE: HOME//   VT
 Install Started for IHS PERSONAL HEALTH RECORD 2.1 :
            Apr 01, 2014@10:47:13
Build Distribution Date: Apr 01, 2014
 Installing Routines:
            Apr 01, 2014@10:47:13
 Running Pre-Install Routine: PRE^BPHR1POS
 Installing Data Dictionaries:
            Apr 01, 2014@10:47:13
 Installing Data:
            Apr 01, 2014@10:47:13
 Installing PACKAGE COMPONENTS:
 Installing SECURITY KEY
 Installing INPUT TEMPLATE
 Installing OPTION
            Apr 01, 2014@10:47:14
 Running Post-Install Routine: EN^BPHR1POS
List started on 04/01/2014 10:47:15
Listing file H:\InterSystems\E3IHS\mgr\Temp\uGjEntfMOEFVVQ.xml as xml
List finished successfully.
Load started on 04/01/2014 10:47:15
```

```
Loading file H:\InterSystems\E3IHS\mgr\Temp\ObZTLgLUT5ZRpQ.xml as xml
Imported class: BPHR.PMQueryServiceHttpSoap11Endpoint
Imported class: BPHR.PMQueryServiceHttpSoap12Endpoint
Imported class: BPHR.WebServiceCalls
Imported class: BPHR.ax21.PMQueryResponse
Imported class: BPHR.ax21.PMRequest
Imported class: BPHR.ax21.Query
Imported class: BPHR.ns.Exception, compiling 7 classes
Compiling class BPHR.PMQueryServiceHttpSoap11Endpoint
Compiling class BPHR.PMQueryServiceHttpSoap12Endpoint
Compiling class BPHR.WebServiceCalls
Compiling class BPHR.ax21.PMQueryResponse
Compiling class BPHR.ax21.PMRequest
Compiling class BPHR.ax21.Query
Compiling class BPHR.ns.Exception
Compiling table BPHR.WebServiceCalls
Compiling routine BPHR.PMQueryServiceHttpSoap11Endpoint.1
Compiling routine BPHR.PMQueryServiceHttpSoap12Endpoint.1
Compiling routine BPHR.WebServiceCalls.1
Compiling routine BPHR.ax21.PMQueryResponse.1
Compiling routine BPHR.ax21.PMRequest.1
Compiling routine BPHR.ax21.Query.1
Compiling routine BPHR.ns.Exception.1
                    IHS PERSONAL HEALTH RECORD 2.1
--------------------------------------------------------------------------------
Compiling class BPHR.PMQueryServiceHttpSoap11Endpoint.queryRequest
Compiling class BPHR.PMQueryServiceHttpSoap12Endpoint.queryRequest
Compiling routine BPHR.PMQueryServiceHttpSoap11Endpoint.queryRequest.1
Compiling routine BPHR.PMQueryServiceHttpSoap12Endpoint.queryRequest.1
Load finished successfully.
Updating 90670.5 Record
 Updating Routine file...
 Updating KIDS files...
 IHS PERSONAL HEALTH RECORD 2.1 Installed.
             Apr 01, 2014@10:48:24
 Not a VA primary domain
 NO Install Message sent
--------------------------------------------------------------------------------
        [---------------------------------------------------------------]
  100%   |              25             50             75              |
Complete [---------------------------------------------------------------]
 Install Completed
```

# 5.0    Installation Configuration

There are two globals associated with the package in RPMS; BPHRCLS and BPHR. Neither global needs to be journaled and neither global will increase in size.

# Glossary

### Personal Health Record

An on-line health record, accessible to patients, containing their medical history. Examples of items contained in a PHR are: clinical and hospital visits, laboratory results, medication history, chronic diseases, etc.

### Resource and Patient Management System (RPMS)

A series of integrated software components that includes clinical, administrative, and financial functions.

# Acronym List

| | |
|---|---|
| **API** | Application Programming Interface |
| **BPHR** | PHR Namespace |
| **CPU** | Central Processing Unit |
| **IHS** | Indian Health Service |
| **KIDS** | Kernel Installation and Distribution System |
| **MU** | Meaningful Use |
| **PHR** | Personal Health Record |
| **RPMS** | Resource and Patient Management System |

# 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