



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **iCare Population Management GUI**

## **(BQI)**

### **Improving Patient Care (IPC) User Manual**

Version 2.3  
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Office of Information Technology (OIT)  
Division of Information Resource Management  
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## Preface

The purpose of this manual is to provide information about the latest enhancements of the iCare (BQI) population management application that supports the IHS Improving Patient Care (IPC) initiative.

This manual contains reference information about iCare views, examples of its processes, and step-by-step procedures that show how to perform activities related to IPC functionality in the latest version of the iCare application.

For more information about iCare basic functionality, iCare usage, or training for iCare, you can consult these resources:

- iCare – IHS OIT  
Available at <http://www.ihs.gov/cio/ca/icare/>
- iCare Population Management GUI, User Manual Version 2.2 (July 2011).  
Available at [http://www.ihs.gov/RPMS/PackageDocs/bqi/bqi\\_022u.pdf](http://www.ihs.gov/RPMS/PackageDocs/bqi/bqi_022u.pdf)
- HHS WebEx recorded training sessions (search for iCare). Available at <https://ihs-hhs.webex.com/mw0306lb/mywebex/default.do?siteurl=ihshhs&service=7>  
or at  
[http://www.ihs.gov/cio/ca/icare/index.cfm?module=dsp\\_icare\\_cmet\\_training](http://www.ihs.gov/cio/ca/icare/index.cfm?module=dsp_icare_cmet_training)
- Join the iCare listserv by sending an e-mail to [icare@listserv.ihs.gov](mailto:icare@listserv.ihs.gov)

## 1.0 Introduction

iCare is a Windows-based, client-server graphical user interface (GUI) to the IHS Resource and Patient Management System (RPMS). iCare retrieves key patient information from various components of the RPMS database and brings it together under a single, user-friendly interface. iCare is intended to help providers manage the care of their patients. The ability to create multiple panels of patients with common characteristics (e.g., age, diagnosis, community) allows users to personalize the way they view patient data.

The information included in this IPC-specific manual covers iCare IPC-support functionality enhancements in iCare Version 2.3 (released April 2012). For more information about iCare basic functionality, iCare usage, or training for iCare, consult the resources listed above in the Preface.

### 1.1 Background

Along with the rest of the healthcare industry, IHS has already developed a set of chronic condition management (or register) applications, including for diabetes, asthma, and HIV. This type of application provides a way for healthcare providers to manage a specific group (register) of patients for a single disease state. Register management applications assist healthcare providers to identify high-risk patients, proactively track care reminders and health status of individuals or populations, provide more standardized and appropriate care by embedding evidence-based guidelines, and report outcomes.

Many patients, however, have more than one diagnosed disease. For instance, at the current time within the Indian Health system, a diabetic asthmatic woman could be a member of four RPMS registers (diabetes, asthma, women's health, and immunizations). This 'silo' approach to patient care could potentially result in fragmented care, and could increase the risk of inadequate patient care management due to misidentification of the true level of risk.

### 1.2 iCare Graphical User Interface

The iCare GUI is intended to allow providers to see a more complete view of patients with multiple conditions, while maintaining the integrity of the user-defined, disease-specific registers.

iCare can help IHS providers by:

- Proactively identifying and managing different groups (populations) of patients who share user-defined characteristics.

- Providing an integrated view of a patient's conditions that would minimize "stove piped" care management.
- Providing an intuitive and integrated interface to the diverse patient data elements of the RPMS database.
- Facilitating providers a review of clinical quality of care measures for their own patients to enable improvement in the quality of healthcare delivery.
- Enabling views of traditional healthcare information from the perspectives of community, population and public health.
- Having the default tag selection be Proposed and Accepted, as shown in the above example. You can change the tag selection for any record by selecting or de-selecting any checkbox.
- Clicking the "use AND?" check box when there are multiple tags selected. The "And" option searches for patients who have ALL of the user-defined tags.

### 1.3 Who Should Use iCare?

- Any provider who needs to identify a group of patients for long-term management or to create a temporary list should think about using iCare. Do you fit any of the following scenarios?
- I am a nurse at a facility that assigns a primary care provider to each patient. Every day, I want to create a list of scheduled patients for two different doctors in my clinic.
- I want to identify which of my patients are considered obese so I can recommend nutrition counseling.
- Because providers at our clinic have performance goals related to annual GPRA clinical measures, I want to identify which of my patients are missing key clinical data.
- Our Women's Health Clinic wants to focus on two clinical performance improvement initiatives this year. We want to identify the performance problem areas for female patients between the ages of 18 and 50.
- I am one of two part-time case managers for a group of children, and I want to create a patient list that we both can use.
- I am a site manager working to ensure our site meets Meaningful Use objectives.

### 1.4 User Desktop (Client) Requirements

iCare software resides on both your facility's RPMS server and on the desktop computer that you use. In order to use iCare successfully, your computer should have the following minimum configuration:

Table 1-1: Computer configuration for installing iCare

<b>Client PC</b>	<b>Minimum Version</b>
Microsoft Windows (Any Windows OS that supports .NET 2.0 Framework)	Windows XP SP2, Windows 2003 Server, Windows 2000 SP3+, Windows ME, Windows 98/98SE
Microsoft .NET Framework	V2.0
Suggested Client PC Hardware	Processor: Minimum: Pentium III 800MHz; Suggested: Pentium 4 2GHz+Memory (RAM): Minimum: 256MB; Suggested: 512MB+
Approximate Disk Space Requirements	iCare Application Footprint ~10MB.NET 2.0 Framework ~ 100MB (if not already installed via Windows Updates)

## 2.0 Improving Patient Care Support in iCare

Improving Patient Care (IPC) is an IHS initiative to improve the healthcare of American Indian and Alaska Native IHS/ITU patients. You can find more information about IPC at the following sources:

- <http://www.ihs.gov/ipc/>
- <http://improvingindianhealth.org/>
- Improving Patient Care Collaborative (IPCIII), Measures Guide, Version 1.1, February 2011

### 2.1 Package Manager

A new IPC Package Manager key has been created. The user must have been granted this key by the iCare Package Manager in order to manage the IPC site parameters.

### 2.2 IPC Site Parameters

Select **Tools | iCare Site Parameters | IPC Site Parameters** to access the **IPC site parameters** screen (Figure 2-1). The IPC Package Manager uses this screen to set the following:

- The day of the month on which to run the iCare IPC data collection
- The type of local clinics to be designated as primary care
- The names of specific providers that can be included by users in the site's microsystem(s)

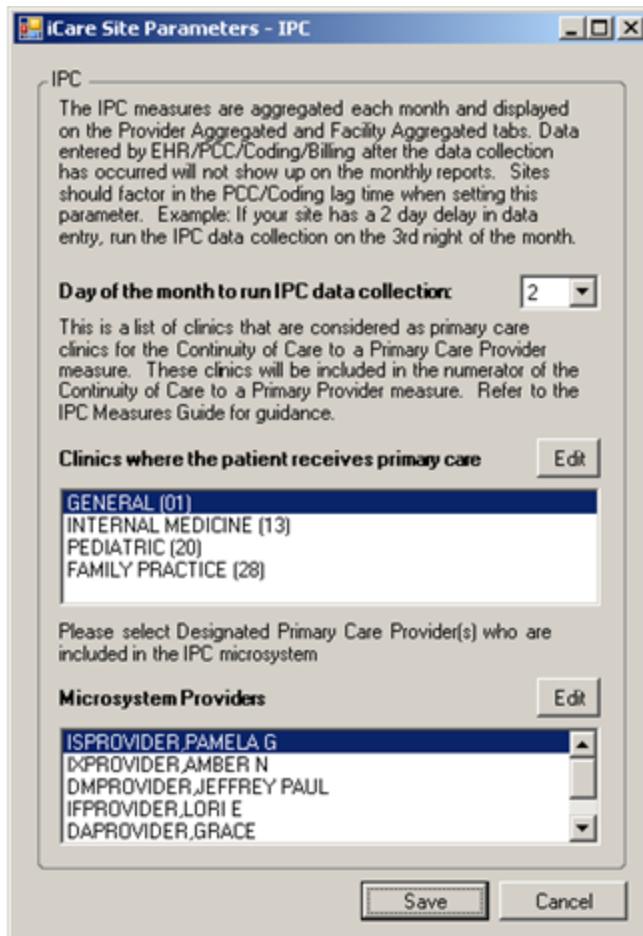


Figure 2-1: IPC Site Parameters screen

### 2.2.1 Primary Care Clinics

This is the list of primary care clinics that are used for the Continuity of Care to a Provider measure (Figure 2-1). The default list of clinics defined upon installation is: GENERAL (01), FAMILY PRACTICE (28), INTERNAL MEDICINE (13) and PEDIATRIC (20). Click **Edit** to access the **Add/Remove Visit Clinics** screen where you can manage the clinics.

### 2.2.2 Microsystem Providers

This is the list of providers who are to be defined in the **IPC Site Parameters** as the site's microsystem (Figure 2-1). Monthly data aggregation will automatically be calculated for any provider who has been designated as a Primary Care Provider and who has at least one patient assigned to them. Click **Edit** to access the **Add/Remove DPCPs** window where you can manage the **Microsystem Providers**.

## 2.3 IPC User Preferences

The following provides information about the **Startup View** for IPC on **User Preferences** as well as the **Patient Detail** and **Panel Detail** sub-tabs to the **IPC** tab.

### 2.3.1 Startup View

iCare users can select **Patient Detail**, **Provider Aggregated**, **Facility Aggregated**, or **Panel Detail** tabs to set as the **Startup** view (Figure 2-2).

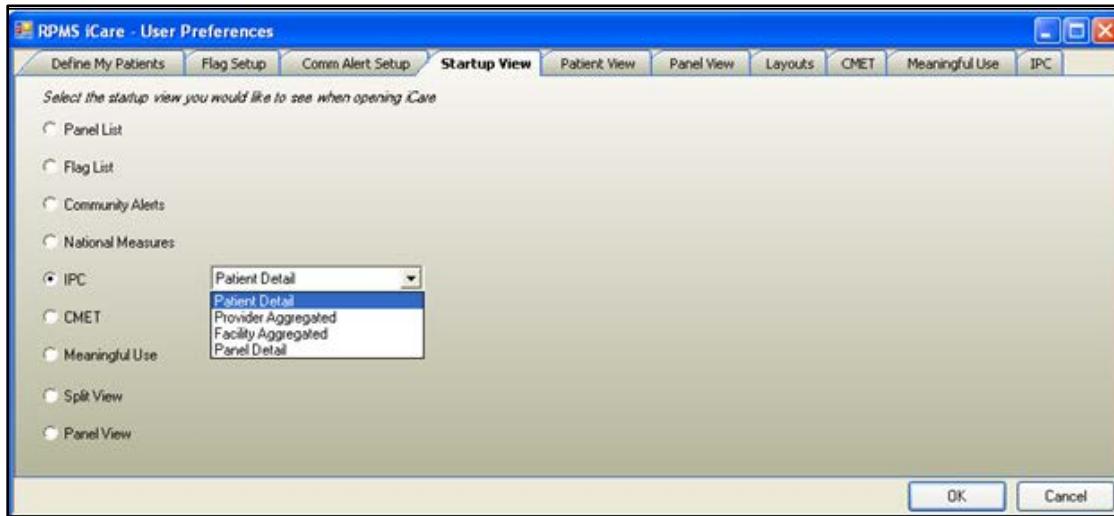


Figure 2-2: Select IPC Startup View tab

### 2.3.2 Patient Detail Sub-tab

iCare users can choose the type of measures and other factors to display in **Patient Detail** (Figure 2-3).

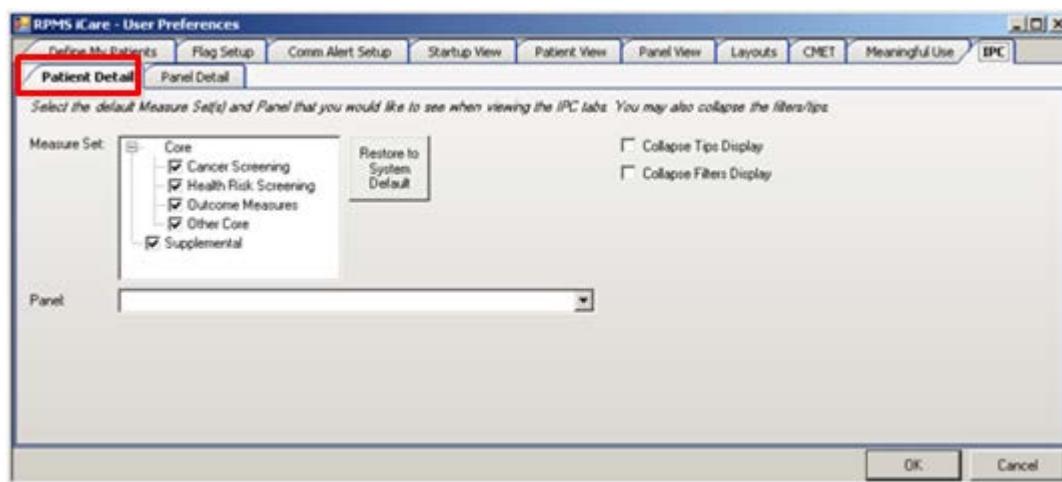


Figure 2-3: Patient Detail sub-tab (highlighted in red)

### 2.3.3 Panel Detail Sub-tab

**Panel Detail** options can also be selected by iCare users (Figure 2-4).

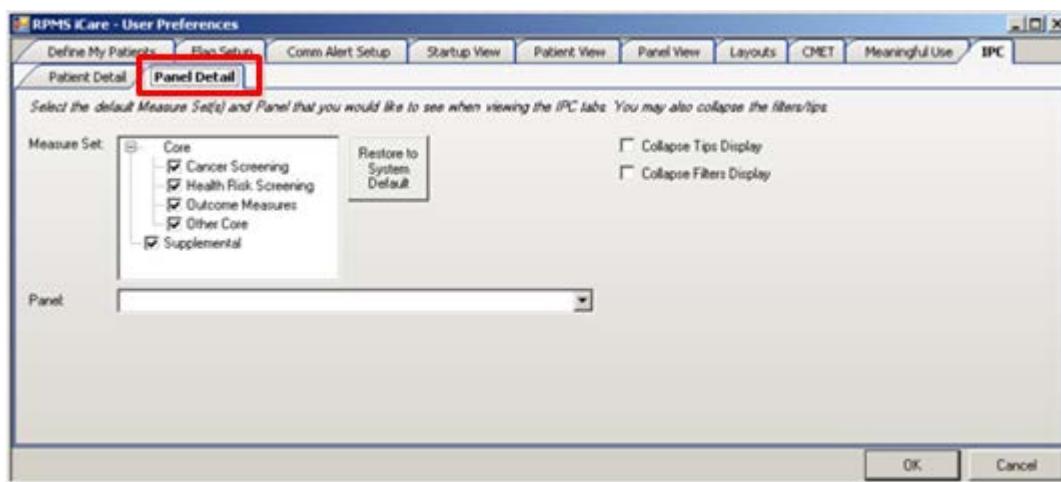


Figure 2-4: IPC Panel Detail tab (highlighted in red)

## 2.4 Creating IPC Panels (Microsystems)

In the **Panel Definition** view, newly created patient panels can now be designated as **IPC Panels** (Figure 2-5). These designated **IPC Panels** can be viewed on the **IPC** tab. This should facilitate the creation of IPC teams/microsystems for IPC compliance monitoring.

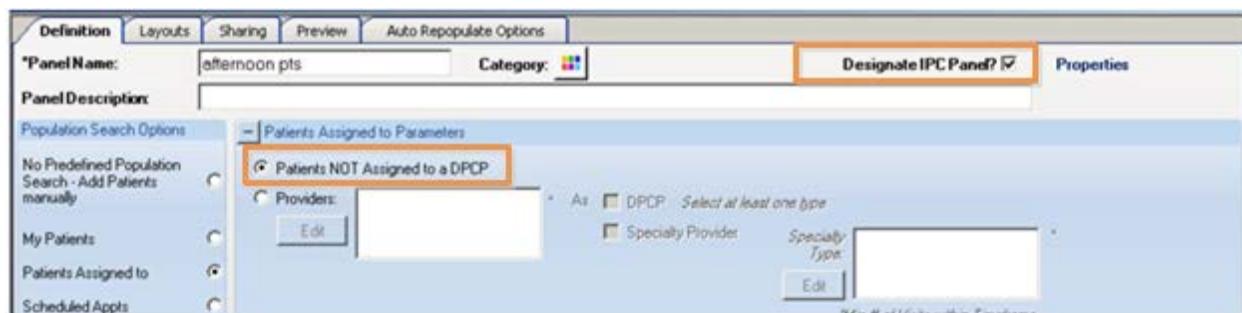


Figure 2-5: Panel Definition tab displays Designate as IPC Panel (highlighted in red) and Patients NOT Assigned to a DPCP (highlighted in red)

As shown in Figure 2-5, iCare now also allows users to create panels of patients that are not assigned to a DPCP. This should facilitate clinical quality improvement efforts where patients are required to have an assigned DPCP.

## 2.5 IPC Main View Tab

As shown in Figure 2-6, there is an **IPC** main view tab.

The screenshot shows the IPC tab of the iCare Population Management GUI. At the top, there are several tabs: Panel List, Flag List, Community Alerts, Nat'l Measures, CMET, Meaningful Use, and IPC. The IPC tab is selected. Below the tabs, there are sections for 'Tips' (describing the results as for the selected panel), 'Filters' (with an optional filter for 'afternoon pts'), and 'Measure Set' (listing Core, Supplemental, and Other Core measures like Cancer Screening, Health Risk Screening, Outcome Measures, and Other Core). A 'Save current settings to User Preferences?' button is also present. The main area displays a table titled 'IPC Measures data from CRS 2011 current as of Feb 24, 2012 07:07 AM'. The table has columns for Designated POP, Patient Name, HRN, DOB, and DM: Comprehensive Care. Data rows include (NOT ASSIGNED), ABBEY, DORIS, and ABBEY, ROBIN LYNN.

Designated POP	Patient Name	HRN	DOB	DM: Comprehensive Care
(NOT ASSIGNED)	ABBEY, DORIS	*140750-CI *140749-CH *140751-URA	Oct 10, 1998 Nov 29, 1897	NDA (D)
	ABBEY, ROBIN LYNN	168917-CI 168918-URA	Dec 04, 1986	N/A

Figure 2-6: IPC tab with all sub-tabs

As shown in Figure 2-6, there are four **IPC** main view sub-tabs:

- **Patient Detail**
- **Panel Detail**
- **Provider Aggregated**
- **Facility Aggregated**

### 2.5.1 Patient Detail Sub-tab

For the **Patient Detail** sub-tab, Core and Supplemental IPC measures compliance data for each patient (aggregated by provider) are shown in the table by Yes (compliant), No (noncompliant), NDA (no data available) or N/A (not applicable to patient) designations (Figure 2-6). In the **Optional Filters** side bar to the left of the screen or **Category Filter** side bar to the left of the screen), the user can select one or more measure sets to display for a selected **IPC** panel simply by selecting the measure set(s).

The screenshot shows the iCare Population Management GUI (BQI) interface. At the top, there is a navigation bar with tabs: Panel List, Flag List, Community Alerts, Nat'l Measures, CMET, Meaningful Use, and IPC. The IPC tab is selected. Below the navigation bar, there are several sub-tabs: Patient Detail (highlighted in red), Panel Detail, Provider Aggregated, and Facility Aggregated. A 'Filters' section on the left side bar is also highlighted in red, containing options for 'Optional filters can be used to focus your view'. The main content area displays 'IPC Measures data from CRS 2011 current as of Feb 24, 2012 07:07 AM'. A table lists patient details such as Designated PCP, Patient Name, HRN, DOB, DM, Comprehensive Care, Health Risk Screening Bundle, and All Star Tiers. The table includes rows for patients like AAA-GODX and ADDT-JUDITH LIVIN.

Figure 2-7: IPC main view tab (top row) and sub tabs (bottom row) with the Patient Detail tab active and filter options (highlighted in red)

In order to reduce the amount of horizontal scrolling to see a large number of measure data columns, the left side bar **Category Filter** selector (Figure 2-7) can be used to limit columnar data display to each of these IPC measures or measure sets individually:

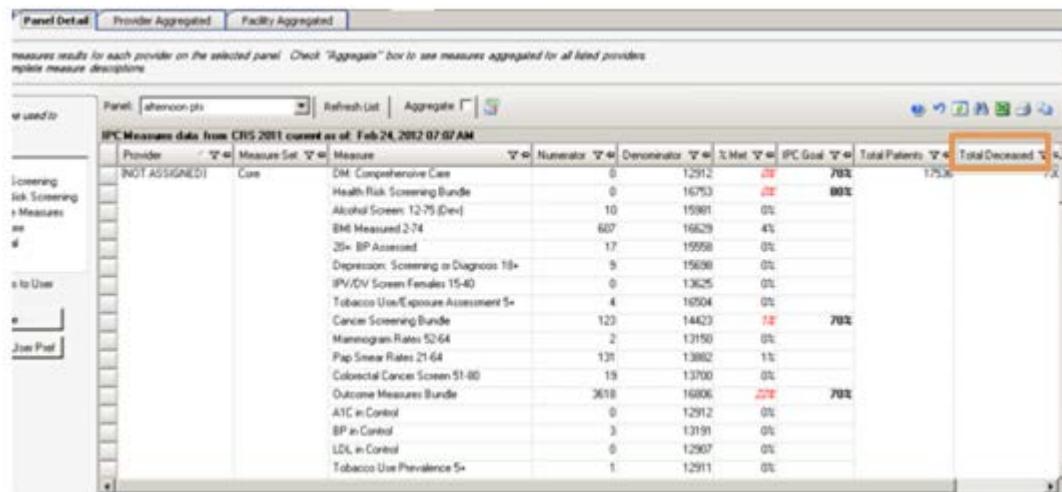
- **Core**
  - **Cancer Screening Bundle**
  - **Health Risk Screening**
  - **Outcome Measures**
  - **Self-Management**
- **Supplemental**

For a panel designated as an **IPC** panel, **Patient Detail** displays all patients with the values of their IPC measures. The values are calculated based on the last time the iCare nightly job or weekly National Measures job completed.

## 2.5.2 Panel Detail Sub-tab

For the **Panel Detail** sub-tab, Core and Supplemental IPC measures compliance data for each provider are shown in the table by display of measure numerator, denominator, and compliance (% Met = numerator/denominator) (Figure 2-8). In the **Optional Filters** left side bar, the user can select one or more measure sets to display for an **IPC** panel simply by selecting the measure set(s).

In the **Panel Detail** view, an IPC column will display the total number of IPC patients who have No Data Available (Total NDA) for each IPC measure (Figure 2-8). To the left of the **NDA** column, a new **Total Deceased** column is also displayed that totals the suspected number of deceased patients erroneously included in each measure.



IPC Measure data from CMS 2011 current as of: Feb 24, 2012 07:07 AM									
Provider	Measure Set	Measure	Numerator	Denominator	% Met	IPC Goal	Total Patients	Total Deceased	
(NOT ASSIGNED)	Core	DM: Comprehensive Care	0	12912	0%	70%	12912	0	
		Health Risk Screening Bundle	0	16753	0%	80%	16753	0	
		Alcohol Screen: 12-75 [Den]	10	15861	0%		15861	0	
		BMI Measured: 2-74	607	16629	4%		16629	0	
		25+ BP Assessed	17	15598	0%		15598	0	
		Depression: Screening or Diagnosis 18+	9	15698	0%		15698	0	
		HPV/CV Screen Females 15-40	0	13625	0%		13625	0	
		Tobacco Use/Exposure Assessment 5+	4	16504	0%		16504	0	
		Cancer Screening Bundle	123	14423	7%	70%	14423	0	
		Mammogram Rates 52-64	2	13150	0%		13150	0	
		Pap Smear Rates 21-64	131	13882	1%		13882	0	
		Colorectal Cancer Screen 51-60	19	13700	0%		13700	0	
		Outcome Measures Bundle	3618	16806	22%	70%	16806	0	
		AIC in Control	0	12912	0%		12912	0	
		BP in Control	3	13191	0%		13191	0	
		LDL in Control	0	12907	0%		12907	0	
		Tobacco Use Prevalence 5+	1	12911	0%		12911	0	

Figure 2-8: IPC Panel Detail view with IPC Measure data and the Total NDA column (highlighted in red)

To change to an aggregated view for all measures and for all providers in an **IPC** panel, check the **Aggregate** checkbox (next to the **Panel** drop-down box). The **Aggregate** view will hide the provider column and display the aggregated totals for all providers for each measure.

**IPC Goals** for the indicated measures appear in data table (Figure 2-9).

For a panel designated as an **IPC** panel, **Panel Detail** displays aggregated data for all patients in the panel for all IPC measures by provider. The values are calculated based on the last time the iCare nightly job or weekly National Measures job completed.

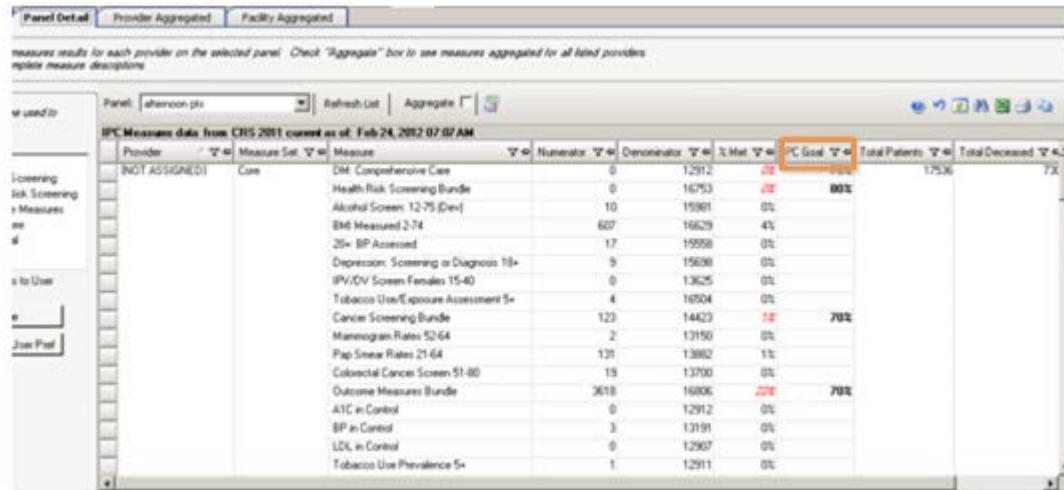


Figure 2-9: IPC Panel Detail view with IPC Goals displayed (highlighted in red)

### 2.5.3 Provider Aggregated Sub-tab

For the **Provider Aggregated** sub-tab, Core and Supplemental IPC measures compliance data for each provider are shown in the table by display of the compliance rate (% Met = numerator/ denominator) for the indicated month (Figure 2-10). By moving your cursor to each data cell in the table, you can see the numerator and the denominator (in a hover box) used for calculating that displayed compliance rate.

The checkboxes above the data table on the **Provider Aggregated** tab also allow the user to filter the displayed data by microsystem (team) and to aggregate the data by microsystem (team).

**IPC Goals** for the indicated measures also appear in this data table (Figure 2-10).

As each month is processed, **Provider Aggregated** is a view of all providers who are Primary Care Providers for all IPC measures. These values are not refreshed after they are calculated. They are a snapshot for the previous month that is calculated the next month on the day specified in the IPC site parameter for data collection.

The screenshot shows the 'Provider Aggregated' tab selected in the top navigation bar. A 'Tips' box provides a brief description of the tab's purpose. Below the tips box is a toolbar with icons for 'Graph It!', 'Filter by Microsystem?', 'Aggregate by Microsystem?', 'Data Portal', and 'Export'. The main area is a table with the following data:

Provider	Measure Set	Measure	IPC Goal	Aug 2011
	Core	Total Patients		N/A
		DM: Comprehensive Care	70%	62%
		Health Risk Screening Bundle	80%	62%
		Alcohol Screen: 12-75 (Dev)		0%
		BMI Measured 2-74		100%
		20+: BP Assessed		50%
		Depression: Screening or Diagnosis 18+		0%
		IPV/DV Screen Females 15-40		0%
		Tobacco Use/Exposure Assessment 5+		0%
		Cancer Screening Bundle	70%	33%
		Mammogram Rates 52-64		0%
		Pap Smear Rates 21-64		100%
		Colorectal Cancer Screen 51-80		0%
		Outcome Measures Bundle	70%	N/A
		A1C in Control		N/A
		BP in Control		N/A
		LDL in Control		N/A

Figure 2-10: Provider Aggregated data displayed

Clicking on the **Graph It** icon above the table will present a user-definable graphical display of the data in the table. The appropriate IPC Goals will also be displayed in the graphs.

#### 2.5.4 Facility Aggregated Sub-tab

For the **Facility Aggregated** sub-tab, Core and Supplemental IPC measures compliance data for all providers combined are shown in the table by display of the compliance rate (% Met = numerator/ denominator) for the indicated month (Figure 2-11). By moving your cursor to each data cell in the table, you can see the numerator and the denominator (in a hover box) used for calculating that displayed compliance rate.

The screenshot shows a software window titled 'iCare - TETER,SHIRLEY - 2010 DEMO HOSPITAL - CDAB - 161.223.92.251'. The menu bar includes 'File', 'View', 'Tools', 'Window', and 'Help'. A toolbar with icons for 'Print', 'Search', and 'Export' is visible. The main area has tabs: 'Patient List', 'Flag List', 'Community Alerts', 'N�t1 Measures', 'CMET', 'Meaningful Use', and 'IPC'. The 'Facility Aggregated' tab is selected. A tip box at the top states: 'This tab displays snapshots of IPC measures for the previous month for all patients assigned to a designated primary care provider (DPCP) within the facility by provider.' Below this is a table with columns: Measure, IPC Goal, Aug 2011, Sep 2011, Oct 2011, Nov 2011. Rows include: Total Patients (Goal: N/A, Actual: 8891), % of Pts Enrolled in a Primary Care Provider (Goal: 90%, Actual: 87%), DM: Comprehensive Care (Goal: 70%, Actual: 65%), Health Risk Screening Bundle (Goal: 80%, Actual: 65%), Alcohol Screen: 12-75 (Dev) (Actual: 0%), BMI Measured 2:74 (Actual: 48%), 20+ BP Assessed (Actual: 49%), Depression: Screening or Diagnosis 18+ (Actual: 49%, Numerator: 3579, Denominator: 7524), IPV/DV Screen Females 15-40 (Actual: 0%), and Tobacco Use/Exposure Assessment (Actual: 0%). A status bar at the bottom right shows 'Selected Rows: 1 Visible Rows: 28 Total Rows: 28'.

Measure Set	Measure	IPC Goal	Aug 2011	Sep 2011	Oct 2011	Nov 2011
Total Patients		N/A	8891	8891	8891	8887
% of Pts Enrolled in a Primary Care Provider	90%	N/A	87%	87%	87%	87%
DM: Comprehensive Care	70%	0%	0%	0%	0%	0%
Health Risk Screening Bundle	80%	0%	0%	0%	0%	0%
Alcohol Screen: 12-75 (Dev)		0%	0%	0%	0%	0%
BMI Measured 2:74		48%	48%	47%	45%	
20+ BP Assessed		49%	49%	43%	35%	
Depression: Screening or Diagnosis 18+		0%	Numerator: 3579 Denominator: 7524			0%
IPV/DV Screen Females 15-40		0%	0%	0%	0%	
Tobacco Use/Exposure Assessment		0%	0%	0%	0%	

Figure 2-11: Facility Aggregated data displayed

IPC Goals for the indicated measures also appear in this data table.

**Facility Aggregated** provides a view on a month-by-month basis for all IPC measures for all providers who are Primary Care Providers. These values are not refreshed once they are calculated. They are a snapshot for the previous month that is calculated the next month on the day specified in the IPC site parameter for data collection.

Clicking on the **Graph It** icon above the table will present a user-definable graphical display of the data in the table. The appropriate **IPC Goals** will also be displayed in the graphs.

## 2.6 Tips, Tooltips, and Glossary

As shown in Figure 2-12, there are **Tips** for some **IPC** tabs that describe the information being displayed. These **Tips** can be hidden or displayed using the **Tips Expand** and **Collapse** buttons.



Figure 2-12: Sample Tips

By moving your cursor over IPC column names, measure names, and data cells, you can also view informational **IPC Tooltips** that appear in hover boxes.

There is also an **IPC Glossary** that can be accessed by clicking on **Help** menu in the top **tool** banner, then selecting **IPC Glossary** (Figure 2-13).

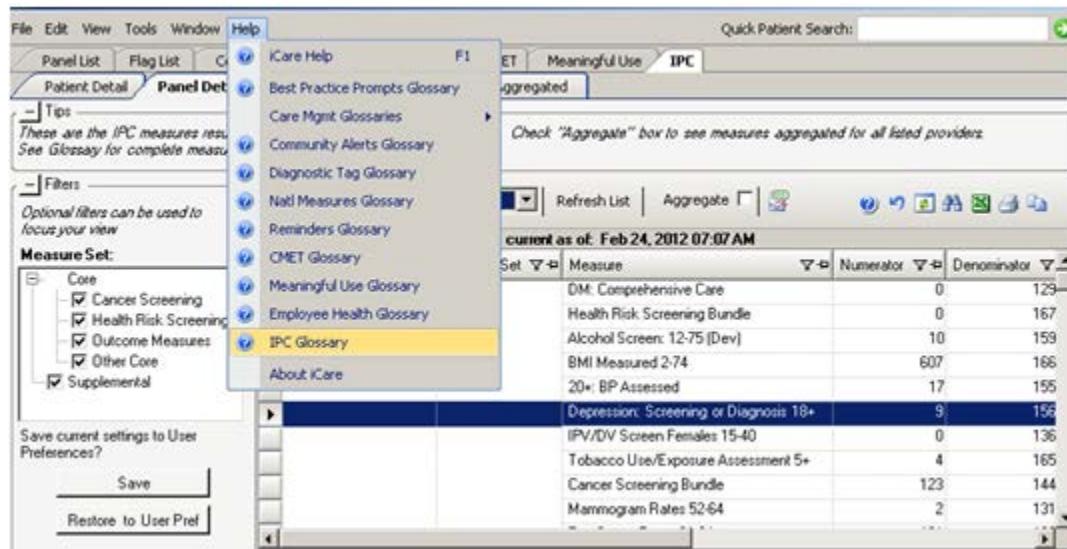


Figure 2-13: IPC Glossary

## 2.7 IPC Data Collection and Transfer to Data Portal

IPC Data Collection and aggregation will be automatically performed on the day of the month (as defined in the IPC site parameter for data collection) during the iCare nightly job. The default value is the 1st of the month. Depending on the timeliness of data entry at each site, this can be adjusted up to the 7th of the month.

Above the **IPC Provider Aggregated** data table, when **IPC Data Portal** is clicked, a dropdown window appears with **Download** and **Upload** choices (Figure 2-14). Selection of either of these automatically connects to the **IPC Data Portal** where the user can log-in and download the appropriate IPC reporting template or upload a completed template.

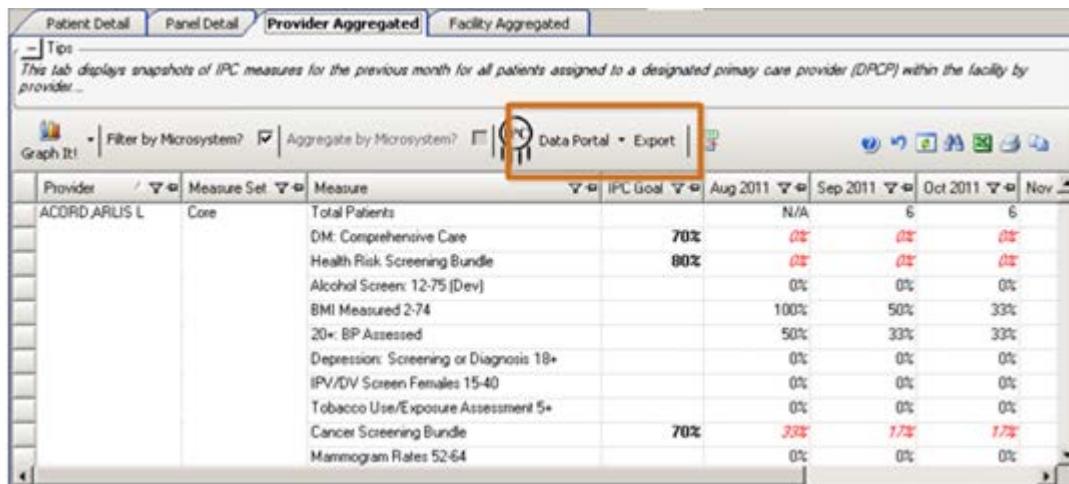


Figure 2-14: IPC Data Portal accessed through the iCare Provider Aggregated tab

To automatically populate an IPC reporting template and upload it using iCare:

1. Navigate to the **iCare IPC** tab.
2. Open the **Provider Aggregated** view.
3. In the **IPC** section of the banner above the data table, click **Data Portal** drop-down list (Figure 2-14).
4. Select the **Download** option.
5. Log onto the **IPC Data Portal** as you normally would and select the Excel template that you want.
6. Give the template a name and file location, then download it.
7. To automatically populate the downloaded template with iCare, click **Export** in the **IPC** section of the banner (Figure 2-14).
8. In the dropdown box that appears, add the provider(s) that you want to the **Provider** box. Select the **Edit** button to edit the listing(s) in the **Provider** box.
9. Click **OK**, then select the file for the Excel template that you want to use (downloaded above through iCare or the standard one that you have been manually filling out for your site).
10. Click **OK**, and the Excel template will automatically be filled out for the provider(s) that you specified in #8 above.
11. In the **IPC** section of the banner above the data table (Figure 2-12), click **Data Portal** again.

12. In the drop-down window that appears, select **Upload**. The completed Excel template from #10 above will be automatically uploaded to the **IPC Data Portal** site.

**Note:** Alternatively, you can save the Excel template that is filled out by iCare (#10 above) and upload it manually to the IPC Data Portal in the manner that you have previously been using for your site.

## Acronym List

<b>BMX</b>	Namespace for BMX ADO.Net Data Broker
<b>BQI</b>	Namespace for iCare
<b>CDC</b>	Centers for Disease Control and Prevention
<b>CQ</b>	Clinical Quality
<b>DPCP</b>	Designated Primary Care Provider
<b>EHR</b>	Electronic Health Record
<b>GPRA</b>	Government Performance and Results Act
<b>GUI</b>	Graphical User Interface
<b>HHS</b>	Health and Human Services
<b>HIV</b>	Human Immunodeficiency Virus
<b>IHS</b>	Indian Health Service
<b>IPC</b>	Improving Patient Care
<b>MB</b>	Megabytes
<b>MU</b>	Meaningful Use
<b>OIT</b>	Office of Information Technology
<b>OS</b>	Operating System
<b>PC</b>	Personal Computer
<b>RPMS</b>	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:** (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](mailto:support@ihs.gov)