



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

CMET User Manual

Version 2.8
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Preface

The iCare application is a Windows-based, client-server graphical user interface (GUI) to the Indian Health Service (IHS) Resource and Patient Management System (RPMS). The iCare application 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.

For more information about iCare basic functionality, iCare usage or training for iCare, see the IHS iCare website at <https://www.ihs.gov/icare/>.

1.0 Introduction

Care Management Event Tracking (CMET) is a tool designed to assist end users in the electronic tracking and management of specific events. CMET is reminiscent of an old-fashioned “tickler file.”

2.0 System Navigation

The CMET module has a tab on each view of iCare: **Main View**, **Panel View**, and **Patient View**.

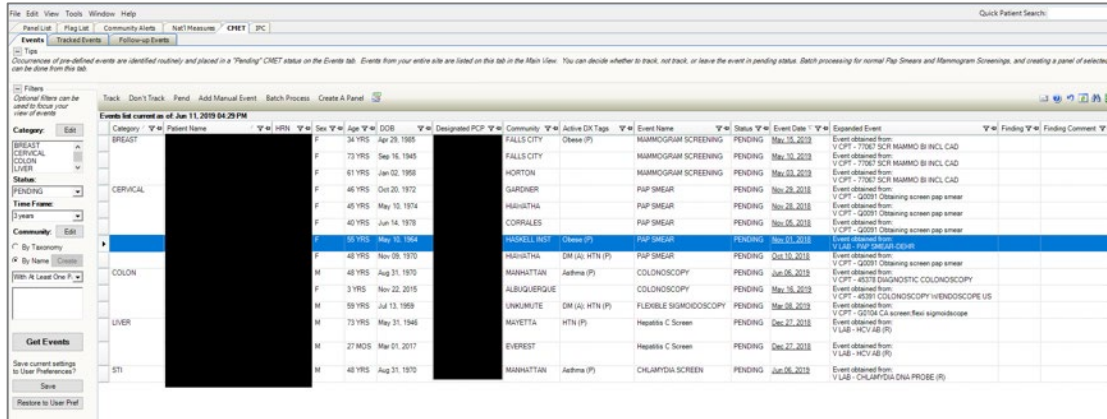


Figure 2-1: CMET tab on Main View

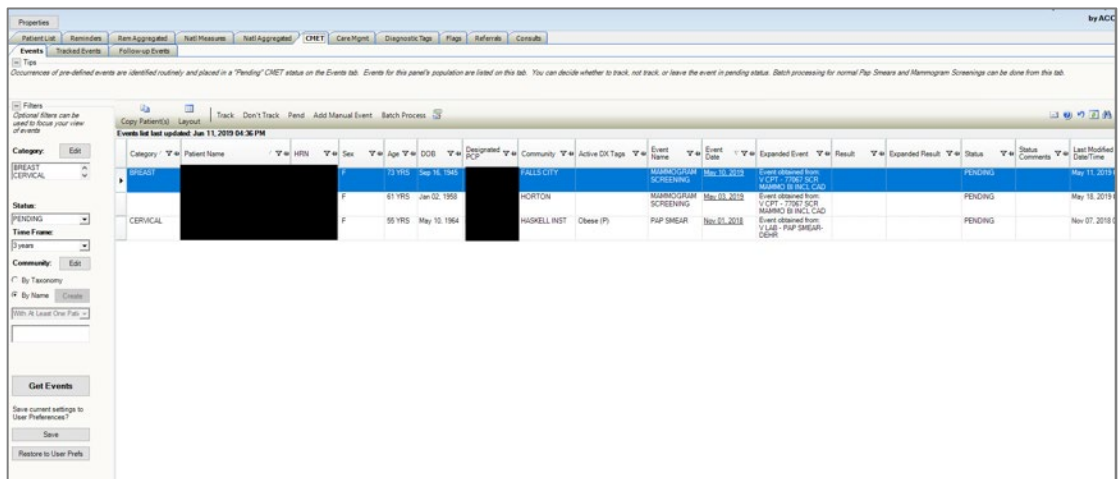


Figure 2-2: CMET tab on Panel View

Additional Demographics Add a Note View Inm Profile

Cover Sheet Snapshot Reminders BP Prompts **CMET** Summ/Supp PCC Problem List Care Mgmt Referrals DX Tags Notes Suicide Form

Events Tracked Events Follow-up Events Past Events

Tip
Occurrences of pre-defined events are identified routinely and placed in a "Pending" CMET status on the Events tab. Events for this patient are listed on this tab. You can decide whether to track, not track, or leave the event in pending status.

Track Don't Track Pend Add Manual Event

Events list current as of Jun 11, 2019 04:41 PM

Category	Event Name	Event Date	Expanded Event	Finding	Finding Comment	Result	Expanded Result	Status	Status Comment	Last Modified Date	Last Modified By
BREAST	MAMMOGRAM SCREENING	Mar 14, 2015	Event obtained from: V CPT - 77057 MAMMOGRAM SCREENING					PENDING		Sep 18, 2017 11:21 AM	Nightly job
	MAMMOGRAM DX BILATERAL	Feb 03, 2014	Event obtained from: V CPT - 77026 MAMMOGRAM BOTH BREASTS					PENDING		Sep 18, 2017 11:21 AM	Nightly job
CERVICAL	PAP SMEAR	Jul 15, 2015	Event obtained from: V CPT - 86141 CYTOPATH C/V INTERPRET					PENDING		Sep 18, 2017 11:21 AM	Nightly job
	PELVIC EXAM	Nov 19, 2012	Event obtained from: V POV - 172 31 ROUTINE GYN EXAMINATION					PENDING		Sep 18, 2017 11:21 AM	Nightly job
COLON	COLONOSCOPY	Jun 02, 2009	Event obtained from: V CPT - 45203 DIAGNOSTIC COLONOSCOPY					PENDING		Sep 18, 2017 11:21 AM	Nightly job
LIVER	Hepatitis C Screen	Jul 15, 2013	Event obtained from: V LAB - HCV AB (R)			Jul 15, 2013	Current Status RESULTED Result: NR Test performed at RML Tulsa 1303 S Ulrica Ave, Tulsa OK 74104 [Redacted] Director Regional Medical Laboratory, Inc. 1923 South Ulrica, Tulsa OK 74104	PENDING		Sep 18, 2017 11:21 AM	Nightly job

Figure 2-3: CMET tab on Patient Record

3.0 Package Management

This section describes the steps to be followed to use CMET.

3.1 User Preferences

In User Preferences, there are several tabs where CMET preferences can be defined: **Startup View**, **Panel View**, **Patient View**, and **CMET**.

The Startup View allows users the option to set the **Main View CMET** tab to be the first view when starting up iCare.

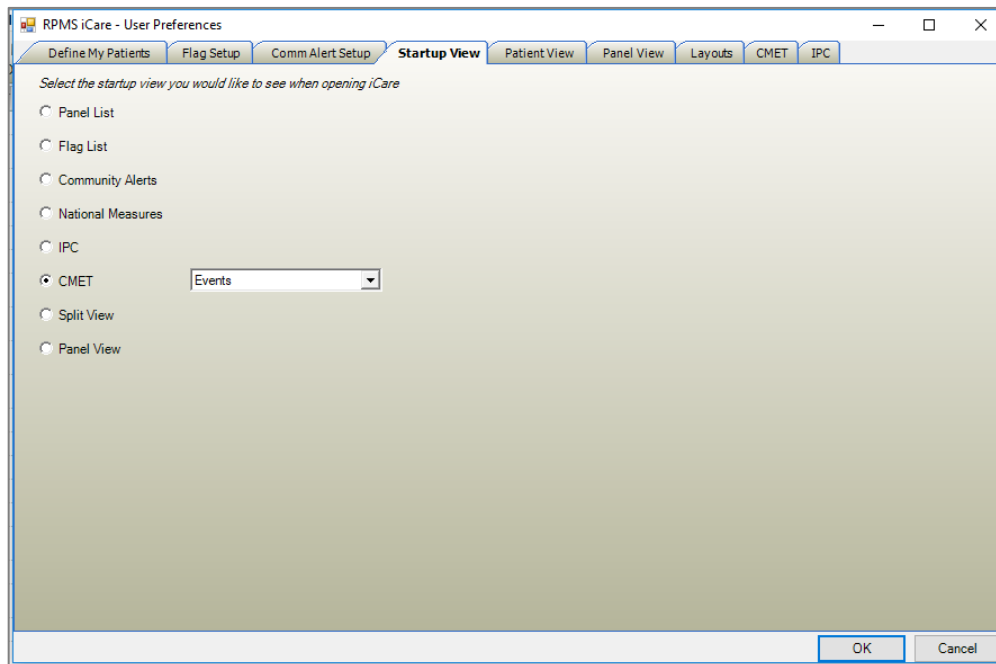


Figure 3-1: **CMET** as Startup View

Select the **CMET** option button to set the **CMET** main window as the first window to display when accessing the iCare application. In addition, select the sub-tab to display (**Events** is the default). Select an option from the list to change the sub-tab.

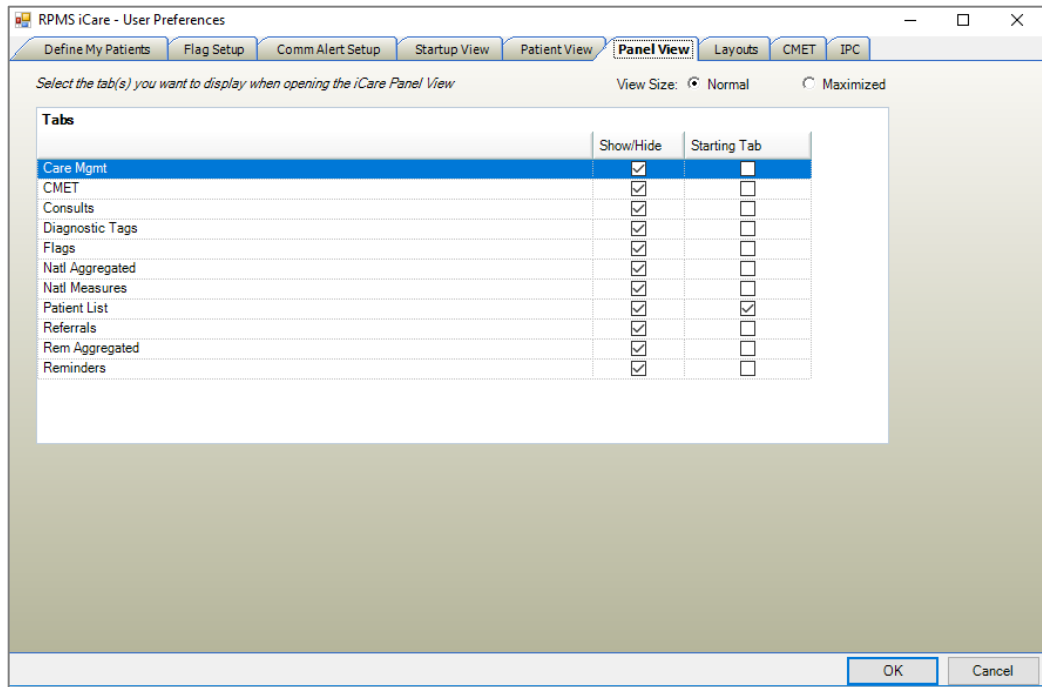


Figure 3-2: **CMET** as Panel View

Select the **Starting Tab** check box for CMET if the view will be CMET when opening a panel.

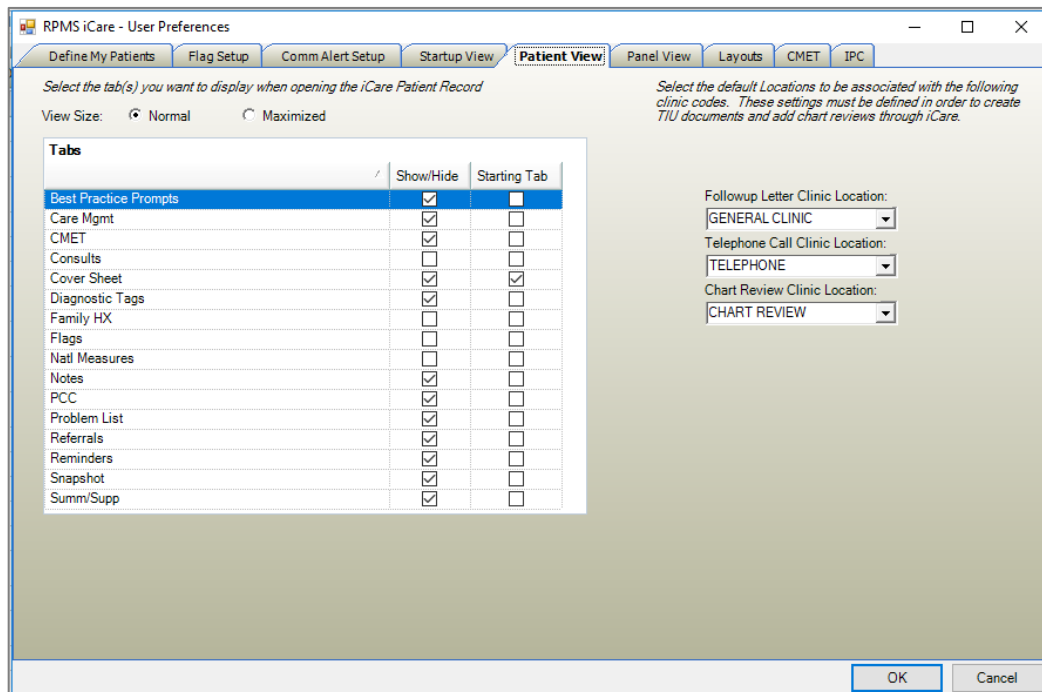


Figure 3-3: **CMET** as Patient View

Select the **Starting Tab** check box for CMET if the view will be CMET when opening Patient View for a specific patient.

The **CMET** tab determines the **Events**, **Tracked Events**, and **Follow-up Events** user preferences for the **Main View CMET** window.

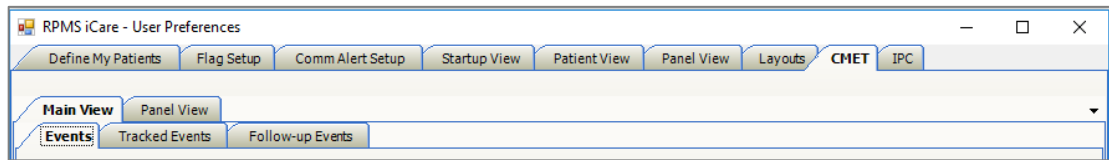


Figure 3-4: **CMET** tab defaults

After changing the settings on any of the three sub-tabs, click **OK** to save the changes (otherwise, click **Cancel**).

3.1.1 Events Sub-tab

This information applies to the **Events** sub-tab for the CMET main view.

The **Events** sub-tab displays all events that have been identified at your site in the routine background job. This can be a very large number of events; limit this display by applying filters to the view. Filtering in this manner does *not* affect the routine background job.

Use the **Events** sub-tab to establish the filters for the current events on the CMET main window.

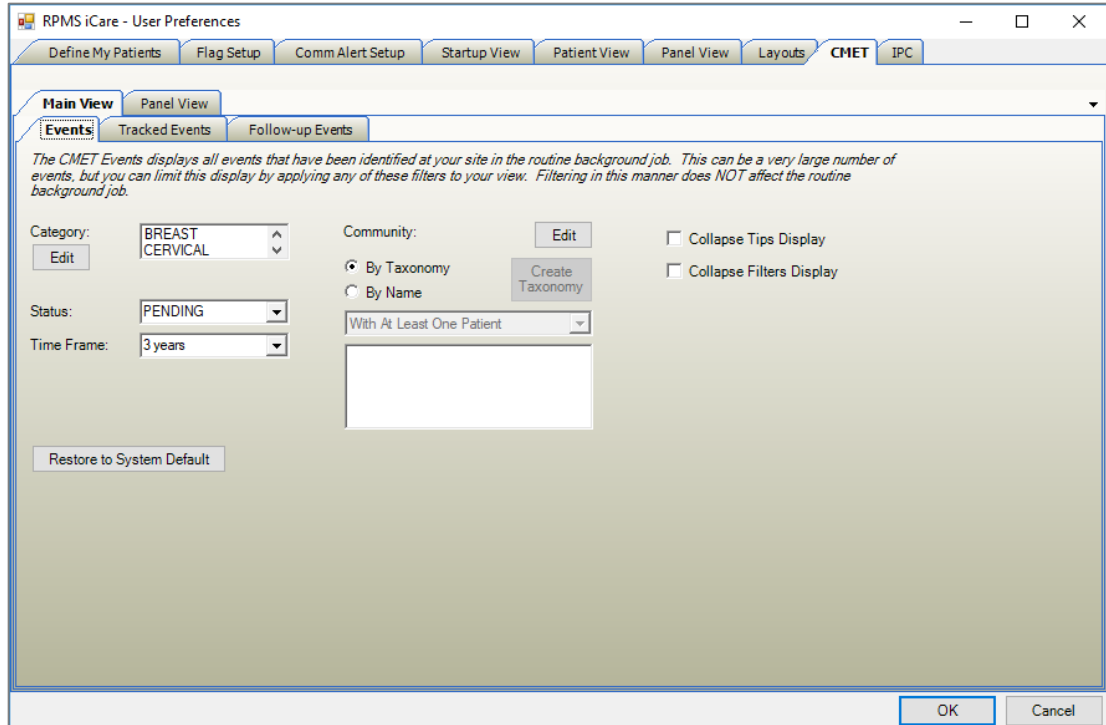


Figure 3-5: CMET Events

Use the **Tracked Events** sub-tab to establish the filters for the tracked events on the CMET main window.

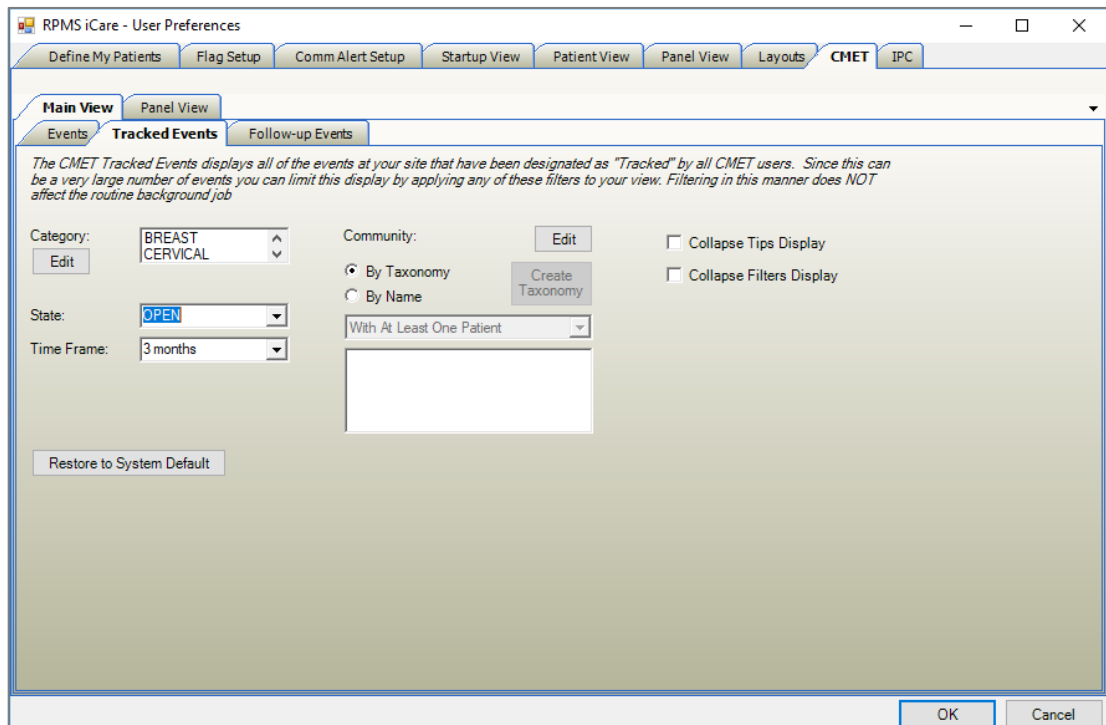


Figure 3-6: CMET Tracked Events

Tracked Events has a State not a Status, but that is the only difference from Events.

State: OPEN

Time Frame: ALL, CLOSED, OPEN

Restore to System Default

Figure 3-7: CMET Tracked Events State

Use the **Follow-up Events** sub-tab to establish the filters for the follow-up events on the CMET main window.

RPMS iCare - User Preferences

Define My Patients | Flag Setup | Comm Alert Setup | Startup View | Patient View | Panel View | Layouts | **CMET** | IPC

Main View | Panel View

Events | Tracked Events | **Follow-up Events**

The CMET Follow-up Events displays all of the planned events at your site that have been generated by all CMET users. Since this can be a very large number of events you can limit this display by applying any of these filters to your view. Filtering in this manner does NOT affect the routine background job

Category: BREAST, CERVICAL (Edit)

Community: (Edit)

Time Frame: Ever

By Taxonomy | By Name (Create Taxonomy)

With At Least One Patient

Collapse Tips Display

Collapse Filters Display

Restore to System Default

OK | Cancel

Figure 3-8: **CMET** Follow-up Events

All three sub-tabs include **Category**, **Community**, **Time Frame**, **Restore to System Default**, **Collapse Tips Display**, and **Collapse Filters Display** options.

Restore to System Default Button

Click the **Restore to System Default** button to return to the system default settings. This button is available on all CMET sub-tabs.

Collapse Tips Display

Select the **Collapse Tips Display** check box to collapse the Tips of the particular sub-tab (you will not be able to view the various tips). This check box is available on all CMET sub-tabs.

Collapse Filters Display

Select the **Collapse Filters Display** check box to collapse the **Filter** group box of the particular sub-tab (you will not be able to view the various filters). This check box is available on all CMET sub-tabs.

Category

Use the **Category** field to filter the displayed events to those in one or more categories. To populate the Category field, click the **Edit** button to access the **Add/Remove Events Category** dialog. The default **Category** field includes Breast, Cervical, Colon, Liver, Skeletal, STI, and Prostate.

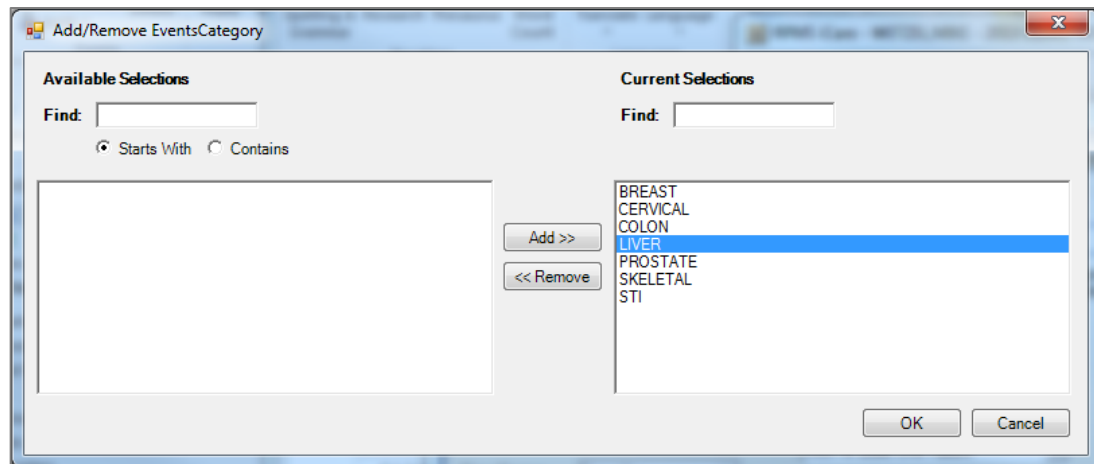


Figure 3-9: **Add/Remove Events Category** dialog

Available Selections

Use the **Find** field to locate a particular event category name by using the two search option buttons: **Start With** determines what the event category name starts with and **Contains** determines any of the characters in the event category name. These option buttons assist users when the Available Selections list is quite long.

To move a selected category name from the **Available Selections** list to the **Current Selections** list, click **Add**.

Current Selections

Use the **Find** field to locate a particular event category by entering a few characters of the event category name. The application will scroll the list to the first found name.

To move a selected category name from the **Current Selections** list to the **Available Selections** list, click **Remove**.

The options in the **Current Selections** field determines the default Category for the **Events (Tracked Events, Follow-up Events)** sub-tab on the CMET main window.

Status

Use the **Status** field to filter the displayed events to those with a particular status. Click the list and select an option to populate the Status field. The Status field is not available on the **Follow-up Events** sub-tab.

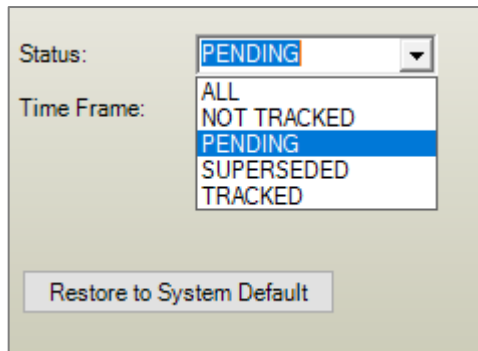


Figure 3-10: **Status** list

Time Frame

Use the **Time Frame** field to filter the displayed events to those in a particular time frame. Click the list and select an option to populate the **Time Frame** field. This field is available on all CMET sub-tabs.



Figure 3-11: **Time Frame** list

Community

Use the **Community** field to filter the displayed events to those in a community either by taxonomy or by name.

The dialog box titled 'Community:' contains an 'Edit' button in the top right corner. Below it are two radio buttons: 'By Taxonomy' (unselected) and 'By Name' (selected). To the right of these buttons is a 'Create Taxonomy' button. Below the radio buttons is a dropdown menu currently showing 'With At Least One Patient'. At the bottom of the dialog is a large empty rectangular field.

Figure 3-12: Community filter fields

Select one of the option buttons to use as a filter for the events.

By Name Option Button

Use the **By Name** option button to define the communities to filter the events.

Use the field below the option buttons to filter the communities in the lower field. The options are (1) **With At Least One Patient** or (2) **All**.

Use the **Edit** button to add one or more names to the lower field. Click the **Edit** button to access the **Add/Remove Communities** dialog.

The 'Add/Remove Communities' dialog box has a title bar with a close button. It is divided into two main sections: 'Available Selections' on the left and 'Current Selections' on the right. Both sections have a 'Find:' text box and a dropdown menu set to 'With At Least One Patient'. Below the 'Available Selections' section are radio buttons for 'Starts With' (selected) and 'Contains'. A list of community names with patient counts is shown in a scrollable area: 11-MILE CORN (6 patients), 29 PALMS RESV (3 patients), 9 MILES FALLS (1 patient), ABBEVILLE (SOUTH CAROLINA) (1 patient), ABERCROMBIE (1 patient), ABERDEEN (IDAHO) (2 patients), ABERDEEN (SOUTH DAKOTA) (2 patients), ABERDEEN (WASHINGTON) (1 patient), ABRAMS (1 patient), ACADEMY (1 patient), ACME (MICHIGAN) (1 patient), and ACOMA (3 patients). Between the two list areas are 'Add >>' and '<< Remove' buttons. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 3-13: Add/Remove Communities dialog

Available Selections

The **Available Selections** option determines the patient population for a community by name. Select an option from the list to change this field.

Section 3.1.1 provides information on how to use the **Available Selections** and **Current Selections** group boxes.

When the **Add/Remove Communities** dialog is complete, click **OK**. The community names in the **Current Selections** group box will populate the lower field. (Otherwise click **Cancel**.)

If the lower field contains more than one community, this activates the **Create Taxonomy** button. To use the **Create Taxonomy** button, the user must have the iCare Editor (BQIZCMED) or iCare Package Manager (BQIZMGR) security key.

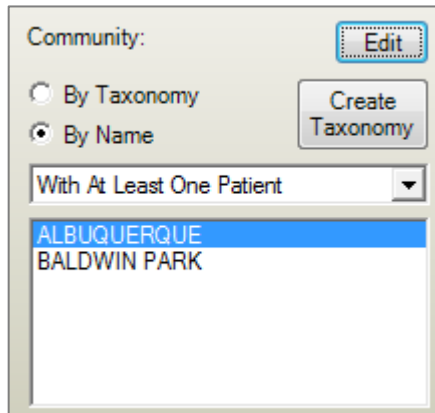


Figure 3-14: **Community** group box with the active **Create Taxonomy** button

Use the **Create Taxonomy** button to save the listed communities as a Community taxonomy. Click the **Create Taxonomy** button to display the **Create/Update Community Taxonomy** dialog.

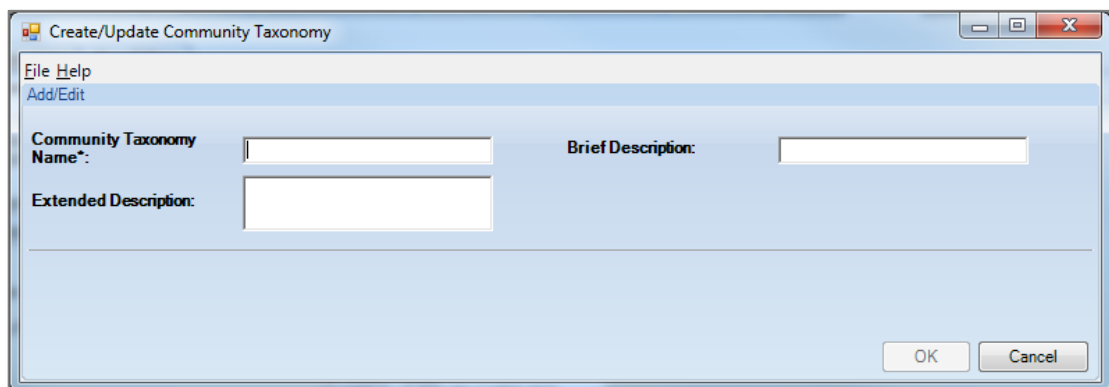


Figure 3-15: **Create/Update Community Taxonomy** dialog

Use the **Community Taxonomy Name** field (required) to specify a taxonomy name for the list of communities. Use the **Brief Description** and **Extended Description** fields (not required) to add other information about the taxonomy. When the dialog is complete, click **OK** (otherwise, click **Cancel**).

If the user uses a duplicate taxonomy name, iCare will display a warning that the user might be overwriting the user's taxonomy. The user can overwrite (**Yes**), save as another name (**No**), or **Cancel** (return to the **Create/Update Community Taxonomy** dialog).

If using a unique taxonomy name, the application displays the **Confirm save to RPMS** information message: "The data will be saved to the RPMS server. Do you want to continue?" Click **Yes** to save the data to the RPMS server (otherwise click **No**).

After clicking **Yes**, the application displays the **Community Taxonomy Create** message stating that the community taxonomy was successfully created and that the panel definition will be updated to reflect the use of a taxonomy rather than a list of communities. Click **OK** to dismiss the message. After clicking **OK**, the list of names will be replaced with the name of the taxonomy, and the **By Taxonomy** option button will be selected.

By Taxonomy Option Button

Use the **By Taxonomy** option button to define the taxonomies to filter the displayed events. After clicking the **Edit** button, the application displays the **Add/Remove Community Taxonomies** dialog.

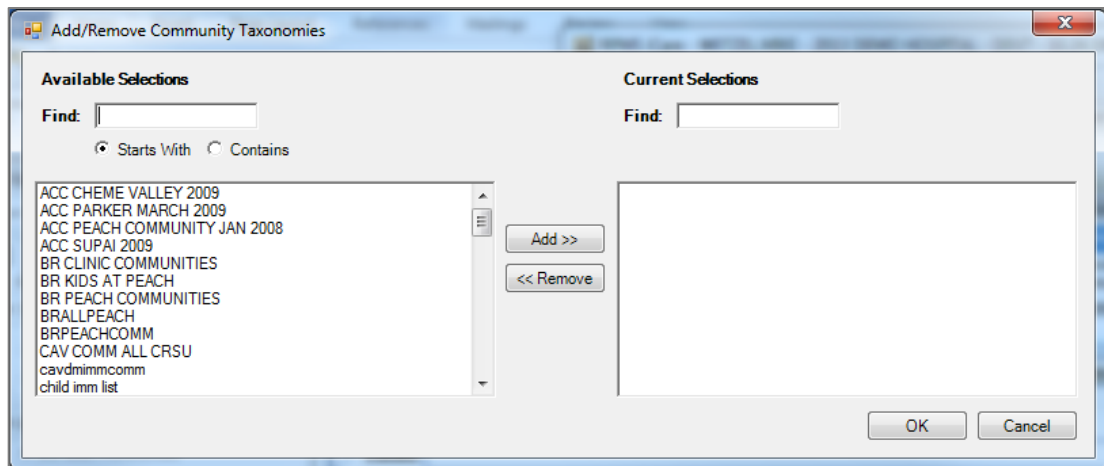


Figure 3-16: **Add/Remove Community Taxonomies** dialog

Section 3.1.1 provides information on how to use the **Available Selections** and **Current Selections** group boxes.

When the **Add/Remove Community Taxonomies** dialog is complete, click **OK**. The options in the **Current Selections** group box determine the default Community by Taxonomy for the Events on the CMET main window. (Otherwise click **Cancel**.)

Panel View has only an **Events** sub-tab, which has the same definitions as Main View **Events** sub-tab.

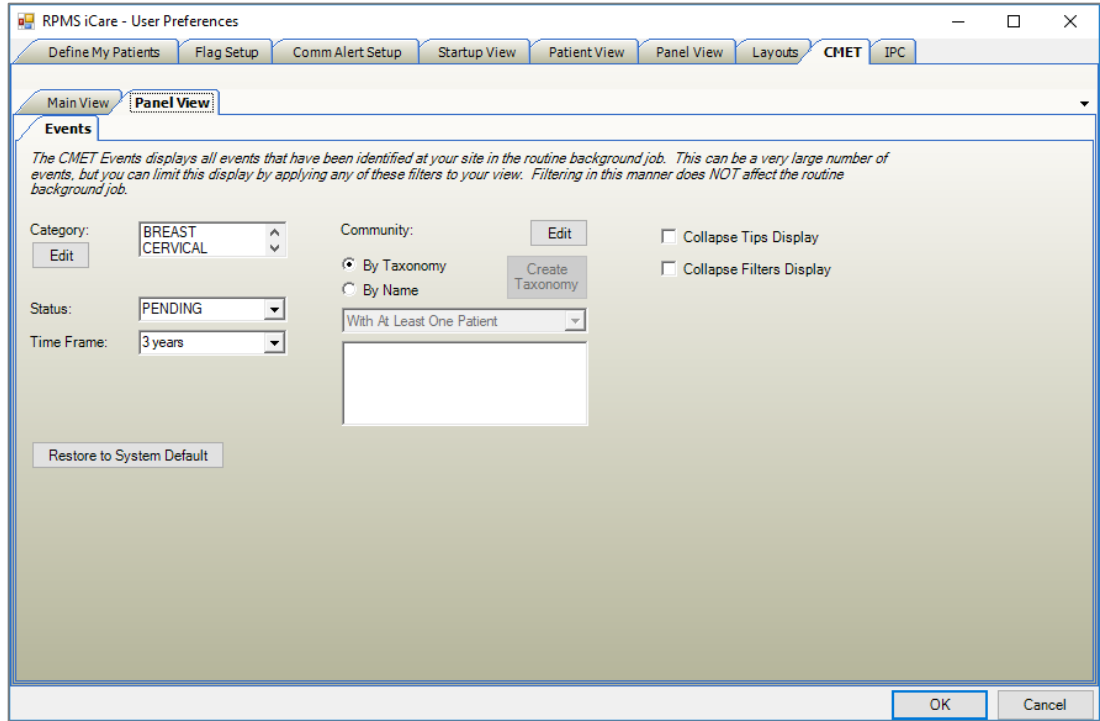


Figure 3-17: Panel View **Events** sub-tab

3.2 Security Keys

Table 3-1: Security key names and descriptions

Key Name	Description
BTPWCMGR	This security key should only be assigned to those persons who will manage the CMET system. It <i>should not</i> be given to the general RPMS user population.
BQZCMED	This security key allows users to track events.

3.3 CMET Site Parameters

Access the **CMET Site Parameters** via **iCare Site Parameters** on the **Tools** menu.

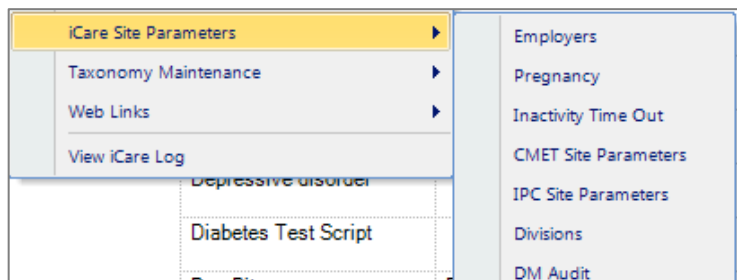


Figure 3-18: **iCare Site Parameter** options

Use the CMET Site Parameters option to determine the **Tickler Timeframes** and **Batch Processing** for CMET. Select the **CMET Site Parameters** option to access the **RPMS iCare – CMET Site Parameters** dialog.

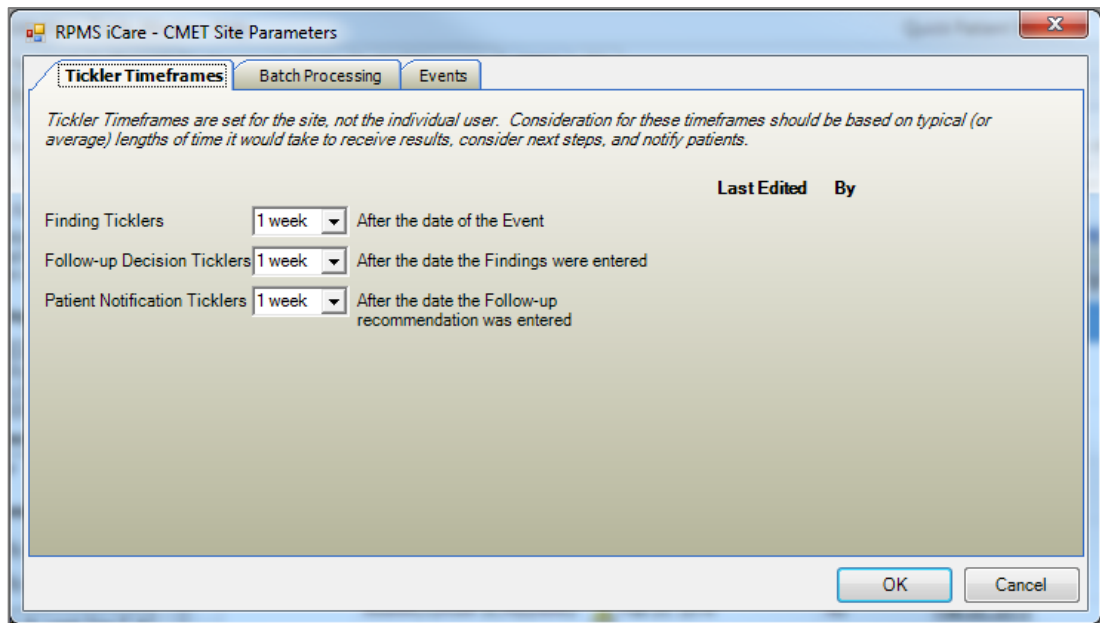


Figure 3-19: **RPMS iCare – CMET Site Parameters** dialog

Tickler Timeframes

The **Tickler Timeframes** tab sets the Ticklers (reminder notices) for **Findings**, **Follow-up Decision**, and **Patient Notification**.

Each field has a list from which to select an option. When a time frame date has passed and the step has not been entered, the Tickler will display.

After changing one or more settings and clicking **OK**, the application populates the **Last Edited** field with the date and the **By** field with the name of the person who changed the **Tickler Timeframe** data. (Otherwise, click **Cancel**.)

The application provides Ticklers designed to remind the user that a CMET is tracked and requires attention. There are three types of Ticklers:

- **Finding Ticklers** are based on the event date and initiated from the event date.
- **Follow-up Decision Ticklers** are initiated from the date the Findings were entered.
- **Patient Notification Ticklers** are initiated from the date that the Follow-up recommendation is entered.

The time frame for each of the three steps is based on the preceding step. For example, a Follow-up Decision Tickler is based on the date the Finding was entered.

Batch Processing Tab

The **Batch Processing** tab sets the time frame and notification type for the Pap Smear and Mammogram Screening events with normal results. In addition, the type of **Normal Finding for the Mammogram Screening** event is set on this tab.

RPMS iCare - CMET Site Parameters

Batch Processing can be done for multiple patients with "Normal" results for Pap Smears or Screening Mammograms. Select the Findings; Timeframe (follow-up interval); and Notification Types that will be entered when performing CMET Batch Processing.

Event Name	Timeframe	Notification Type	Last Edited	By
Pap Smear	3 years	LETTER	9/14/2016	
Mammogram Screening	2 years	LETTER	6/10/2014	

Normal Finding for Mammogram Screening

BI-RAD CATEGORY 1 - NEGATIVE

OK Cancel

Figure 3-20: **Batch Processing** tab

The **Notification Type** field defines how the patient will be notified about the Pap Smear or Mammogram Screening, for example, by telephone. The default is **LETTER**.

The **Timeframe** consideration is based on typical (or average) length of time it would take to receive results, to consider the next steps, and to notify the patient.

The option selected for the **Normal Finding for Mammogram Screening** field determines what is a normal finding.

Each field has a list from which to select an option.

After changing one or more settings and clicking **OK**, the application populates the **Last Edited** field with the date and the **By** field with the person who changed the batch processing data. (Otherwise, click **Cancel**.)

Events

The **Events** tab allows users to edit a manual event default value.

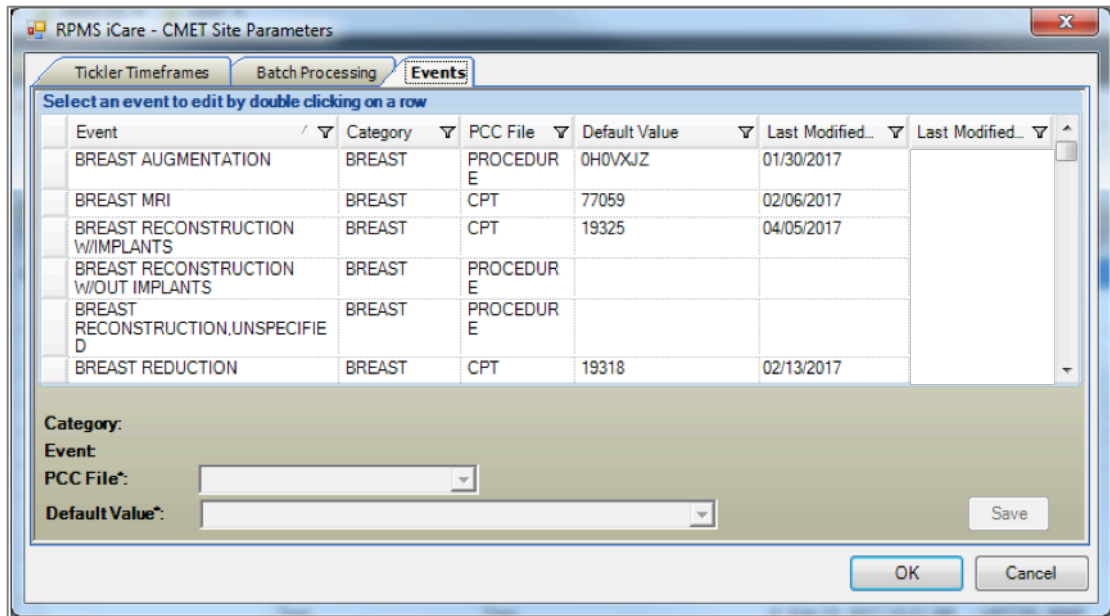


Figure 3-21: **Events** tab

Double-click on an event in the grid to populate the bottom of the form. Depending on the definition of the Event, see Appendix A to determine what the default PCC File will be.

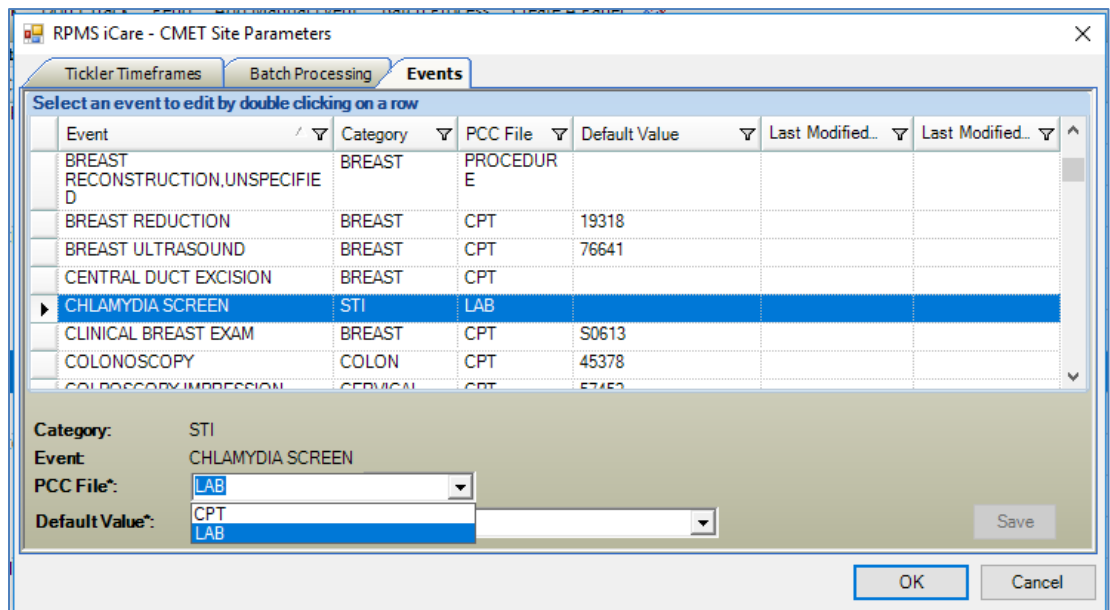


Figure 3-22: **PCC File** list

Based on the selected PCC File, you will be given a list from the appropriate taxonomy to choose for the **Default Value** field.

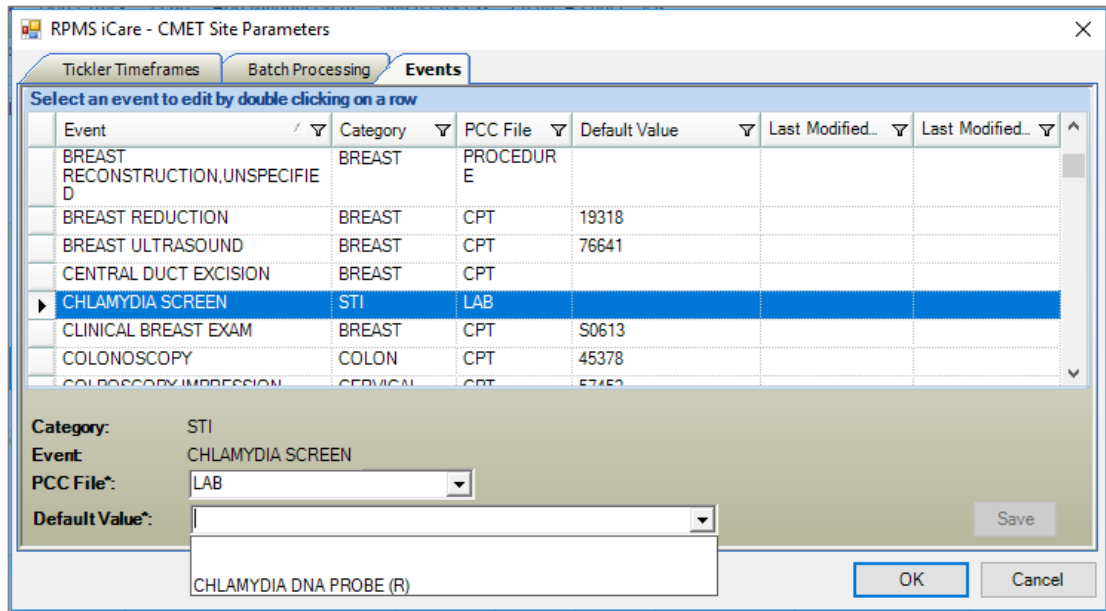


Figure 3-23: Default Value for the LAB taxonomy

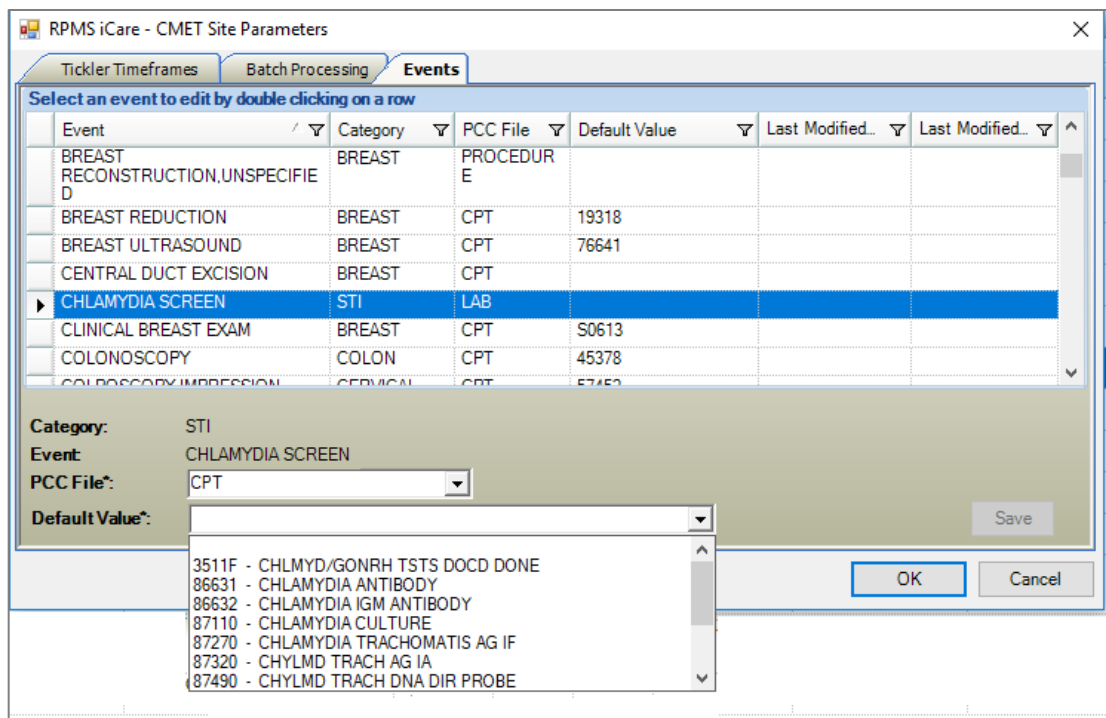


Figure 3-24: Default Value for the CPT taxonomy

Select **PCC File** value and then **Default Value**. Click the **Save** button.

The user who last modified the Event, as well as when the modification was made, will be saved and displayed.

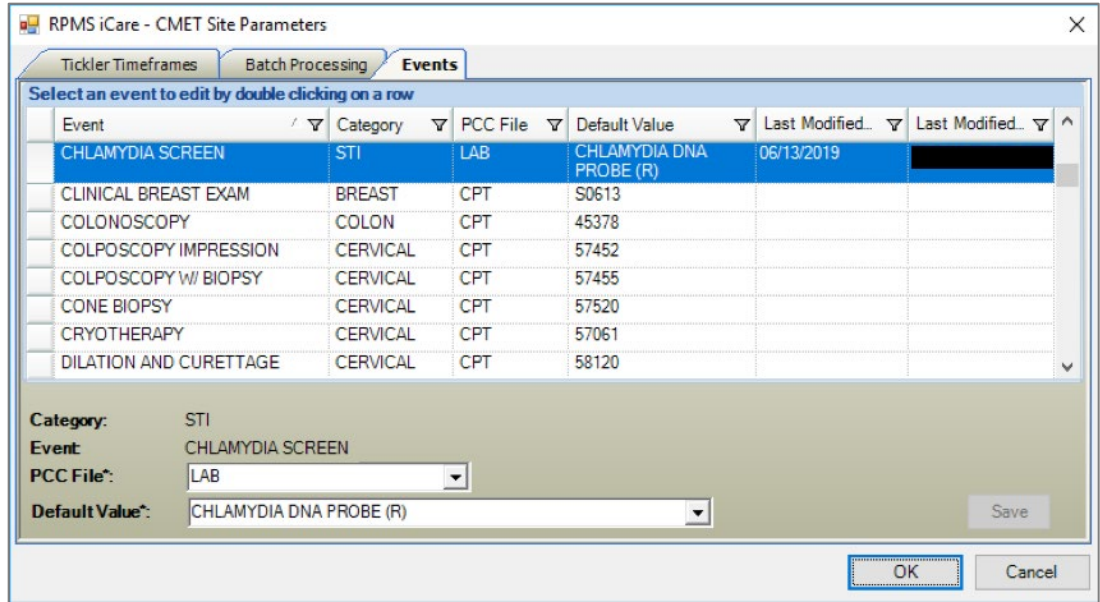


Figure 3-25: Completed Event

The **Event** data saved will default when selecting the **Event** for **Add Manual Event**.

Add Manual Event [Close]

Patient Name: DEMO,PATIENT

Date*: 06/13/2019 [Dropdown]

Event*: CHLAMYDIA SCREEN [Dropdown]

PCC File*: LAB [Dropdown]

Default Value*: CHLAMYDIA DNA PROBE (R) [Dropdown]

Finding: [Dropdown]

Location:

IHS / Tribal Facility

2016 DEMO HOSPITAL [Dropdown]

Hospital Location*: [Dropdown]

Other

Outside Location: [Text Field]

Outside Provider: [Text Field]

Findings comment (optional): [Text Area]

[Save] [Save and Track] [Save, Track and Open Worksheet] [Exit]

Figure 3-26: **Add Manual Event** default

4.0 Package Operation

The Care Management Event Tracking (CMET) tab on the iCare Main View window provides information on the **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs. The CMET data in the Main View includes all data that meets the filter criteria.

Category	Patient Name	HRN	Sex	Age	DOB	Designated PCP	Community	Active DX Tags	Event Name	Status	Event Date	Expanded Event
BREAST			F	40 YRS			FALLS CITY	DM (A); HTN (P); Obese (P)	MASTECTOMY UNILATERAL	PENDING	Apr 18 2018	Event obtained from: V CPT - 51021 MAST SIMPLE COMPLETE
			F	44 YRS			FALLS CITY	Obese (P)	MASTECTOMY BILATERAL (W/BI MOD 50)	PENDING	Apr 08 2018	Event obtained from: V CPT - 19307 MAST MOD RAD
			F	31 YRS			FALLS CITY		DISSECTION SENTINEL	PENDING	Apr 08 2018	Event obtained from: V CPT - 86077 BIOPSY/REMOVAL LYMPH NODES
			F	57 YRS			FALLS CITY	HTN (P)	BREAST MRI	PENDING	Apr 08 2018	Event obtained from: V CPT - C808 MRI w/o fol w/cont. breast.
			F	47 YRS			FALLS CITY	DM (A); HTN (P)	PAP SMEAR	PENDING	Apr 18 2018	Event obtained from: V CPT - P3001 Screening pap smear by phis
			F	35 YRS			FALLS CITY	HTN (P)	PERIANAL BIOPSY	PENDING	Apr 18 2018	Event obtained from: V CPT - 86077 DIAGNOSTIC ANOSCOPY & BIOPSY
			F	39 YRS			FALLS CITY	HTN (P)	PELVIC EXAM	PENDING	Apr 18 2018	Event obtained from: V CPT - G0101 CA screen.pelvic/breast exam
			F	39 YRS			FALLS CITY		CONE BIOPSY	PENDING	Apr 18 2018	Event obtained from: V CPT - 57520 CONIZATION OF CERVIX
			F	57 YRS			FALLS CITY	HTN (P)	LASER CONE	PENDING	Apr 18 2018	Event obtained from: V CPT - 57520 CONIZATION OF CERVIX
			F	30 YRS			FALLS CITY	HTN (P)	PELVIC EXAM	PENDING	Apr 08 2018	Event obtained from: V CPT - G0101 CA screen.pelvic/breast exam
			F	26 YRS			FALLS CITY	Obese (P)	HPV - DNA SCREEN	PENDING	Apr 08 2018	Event obtained from: V CPT - G0476 Hpv combo assay ca screen
			F	38 YRS			FALLS CITY		ENDOMETRIAL BIOPSY	PENDING	Apr 08 2018	Event obtained from: V CPT - 59824 Endo smpl/hyst bx res no doc
			F	38 YRS			FALLS CITY		COLPOSCOPY IMPRESSION	PENDING	Apr 08 2018	Event obtained from: V CPT - 57451 CONZ OF CERVIX WISCOPE LEEP
			F	38 YRS			FALLS CITY		CONE BIOPSY	PENDING	Apr 08 2018	Event obtained from: V CPT - 57451 CONZ OF CERVIX WISCOPE LEEP
			F	38 YRS			FALLS CITY		LEEP	PENDING	Apr 08 2018	Event obtained from: V CPT - 57451 CONZ OF CERVIX WISCOPE LEEP
			F	63 YRS			FALLS CITY	CKD 3 (P); COPD (P); DM (A); HTN (P)	CONE BIOPSY	PENDING	Apr 08 2018	Event obtained from: V CPT - 57522 CONIZATION OF CERVIX
			F	63 YRS			FALLS CITY	CKD 3 (P); COPD (P); DM (A); HTN (P)	LEEP	PENDING	Apr 08 2018	Event obtained from: V CPT - 57522 CONIZATION OF CERVIX
			F	46 YRS			FALLS CITY	HTN (P)	COLONOSCOPY	PENDING	Apr 08 2018	Event obtained from: V CPT - 44407 COLONOSCOPY W/NDL ASP/REX

Figure 4-1: CMET Events tab

Category	Patient Name	HRN	Sex	Age	DOB	Designated PCP	Community	Active DX Tags	Event Name	Status	Event Date	Expanded Event
BREAST			F	36 YRS			PEACH SPRGS					MAM
			F	79 YRS			VALENTINE	DM (P); HTN (P)				MAM
			F	59 YRS			PARKER					BRE
			F	23 YRS			GALLUP					BRE
CERVICAL			M	50 YRS			DULCE					PAP
STI			F	37 YRS			BIRDTOWN	DM (P); Obese (P)				CHL
			F	24 YRS			RIVERSIDE					CHL
			U	23 YRS			LAS VEGAS					CHL

Figure 4-2: CMET Events tab

The data on the various sub-tabs are for those patients with an active HRN (Health Record Number).

The **CMET** tab displays the statuses of particular tests/procedures/exams on the various sub-tabs. The term “event” refers to what needs to be completed, for example, Breast Exam.

- These events are listed by category: Breast, Cervical, Colon, Liver, Prostate, Skeletal, and STI.
- The events apply to all patients meeting the data mining criteria.

If two users are working on the same CMET record, the changes that are saved first will be applied. A message to the second user is provided: “This record has just been updated. Do you want to refresh the entire list?” Click **Yes** to refresh (otherwise, click **No**).

Consider the following information:

When using the **Startup View** tab of **User Preferences**, select the desired startup view when opening iCare. Select the **CMET** option button on **User Preferences** to view a secondary field. Use this secondary field to define the default sub-tab, for example, **Tracked Events**. Select the **Layouts** tab on **User Preferences** to select the default template for the various CMET sub-tabs.

4.1 CMET Workflow

When events are mined via the iCare nightly Background Job, they show up as a **Pending** event in the **Events** tab for evaluation to determine if the event was positive or negative, and whether it should be tracked.



Event Name	Event Date	Result	Status	Status Comments
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 20, 2014	Nov 20, 20	PENDING	

Figure 4-3: Sample Result detail and CMET Events tab row highlighted

New columns were added to show the detail information about the **Event** and the **Result: Expanded Event** and **Expanded Result**. The original underlined columns still open to display the result of the information.

Event Name	Status	Event Date	Expanded Event	Result	Expanded Result	Status
MAMMOGRAM SCREENING	PENDING	Oct 12, 2012	Event obtained from: V POV - 793.89 ABN FINDING-BREAST NEC			
BREAST ULTRASOUND	PENDING	Oct 12, 2012	Event obtained from: V CPT - 76645 US EXAM BREAST(S)			
MAMMOGRAM DX BILATERAL	PENDING	Oct 12, 2012	Event obtained from: V CPT - G0204 Dx mammo incl cad bi			
MAMMOGRAM DX BILATERAL	PENDING	Oct 05, 2012	Event obtained from: V CPT - 77056 MAMMOGRAM BOTH BREASTS			
BREAST ULTRASOUND	PENDING	Sep 28, 2012	Event obtained from: V RADIOLOGY - ECHOGRAM BREAST B-SCAN &/OR REAL TIME	Sep 28, 2012	<p>Req Phys: [REDACTED] 46169 DOB-AUG 15, 1971 F Case: 092812 -113@11:05 Pat Loc: OPEN ACCESS FIGLER (Reg Loc) Att Phys: UNKNOWN DEPARTMENT Pri Phys: UNKNOWN Service: Unknown Pregnancy Screen: Patient is unable to answer or is unsure Pregnancy Screen Comment: not</p> <p>(Case 113 COMPLETE) ECHOGRAM BREAST B-SCAN &/OR REAL (RAD Detailed) CPT: 76645 SNOMED-CT: none LOINC: none Proc Modifiers - LEFT Reason for Study: See Clinical History:</p> <p>Clinical History: MAMMOGRAM AT LA PAZ SHOWS NODULAR DENSITY, APPROX 3OCLOCK LEFT BREAST, ESSENTIALLY RETROARELAR. US RECOMMENDED. SEE SCANNED RESULTS IN SYSTEM.</p> <p>Report: Status: VERIFIED</p>	

Figure 4-4: Sample Events list

Even events with a negative result should be tracked in order to indicate that someone has reviewed and verified the result, that the patient has been notified of the result, and whether a follow-up procedure has been identified.

For negative Pap smears and mammograms reports, multiple events can be batch processed because there is a set follow-up, such as another Pap or mammogram in a defined time frame in one year, two years, etc.

Category	Patient Name	HRN	Batch Process	Event Name	Status	Event Date	Expanded	
BREAST			88 YRS	QUARTZSITE HTN (P)	MAMMOGRAM SCREENING	PENDING	Mar 18, 2013	Event V POV
			65 YRS	PEACH SPRGS DM (P), HTN (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			41 YRS	PEACH SPRGS Asthma (P), Obese (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			56 YRS	VALENTINE HTN (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			72 YRS	PEACH SPRGS DM (P), Glau (P), HTN (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			69 YRS	PEACH SPRGS Asthma (P), HTN (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			62 YRS	PEACH SPRGS DM (P), HTN (P)	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			42 YRS	PEACH SPRGS	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			54 YRS	PEACH SPRGS	MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT

Figure 4-5: Batch Process dialog

CMET Batch Mammogram Screening

Batch Parameters
Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram.
The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram); Follow up In and Notification Type can be changed.

Status: TRACKED

Event Finding*: B-RAD CATEGORY 1 - N Finding Interpretation: Normal

Follow-up Event: MAMMOGRAM SCREENING Follow-up In*: 2 years

Notification Type*: LETTER Notification Date*: 02/14/2017

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Patient Name	HRN	DOB	Sex	Event Date
			F	Feb 20, 2013
			F	Feb 20, 2013
			F	Feb 20, 2013
			F	Feb 20, 2013

OK Cancel

Figure 4-6: Sample multiple selection and Batch Process detail screens

Follow-up Events become CMET Reminders when the iCare Nightly Background Job runs (or an iCare user accesses a patient’s **Reminders** tab in the iCare Patient Records and recalculates the Reminders for the selected patient) and can be due in the future or overdue.

Follow-up Events		
Category	Follow-up Event Name	Follow-up Event Date
BREAST	MAMMOGRAM SCREENING	Feb 20, 2018
	MAMMOGRAM SCREENING	⚠ Mar 10, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015

Figure 4-7: CMET Follow-up Events view with overdue events

Users of iCare can then create an iCare panel based on the MAMMOGRAM SCREENING (CMET) reminder for upcoming or overdue reminders and follow the normal process for Reminder Notifications from the **Panel View – Definition** details tab.

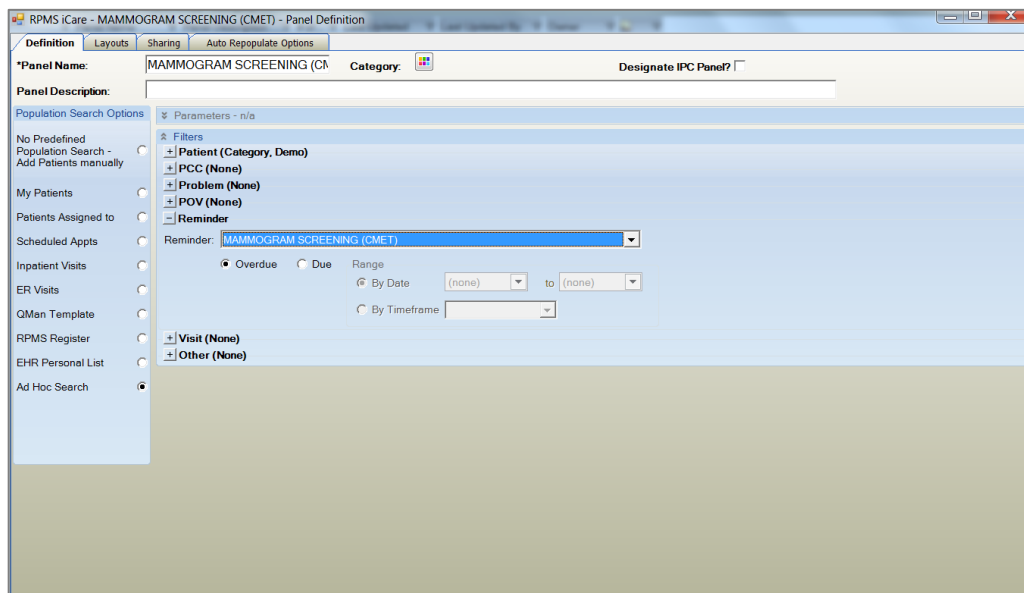


Figure 4-8: Definition Panel Filter view with the CMET Reminder Overdue option button selected

4.2 CMET Main View

This section describes the sub-tabs for the CMET main window.

4.2.1 Events Sub-Tab

The **Events** sub-tab displays all events that have been identified at your site in the routine Background Job. This can be a very large number of events; limit this display by applying filters to the view. Filtering in this manner does not affect the routine Background Job.

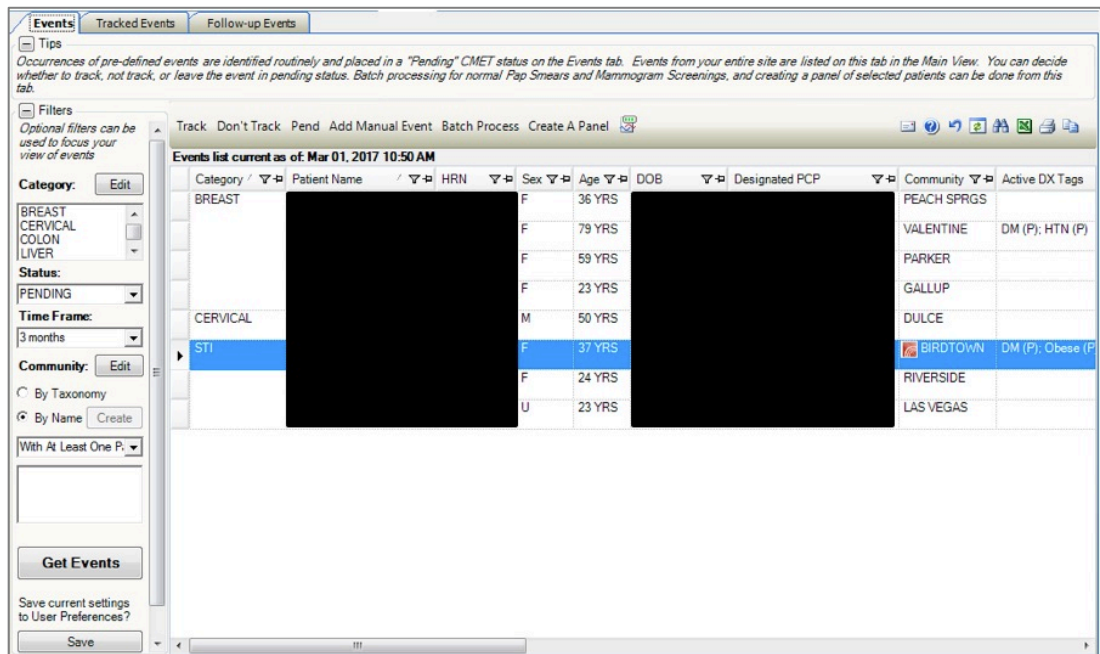


Figure 4-9: **Events** sub-tab

Events are procedures, screenings, and/or exams that are pre-defined and categorized into Breast, Cervical, Colon, Liver, Skeletal, STI, and Prostate. The occurrence of these events is searched for during a routine Background Job at your site. The most recent occurrence of any event within a certain time period is then placed on the **Events** tab where users can elect to either track or not track the event, or leave it in a Pending status indefinitely.

The information on this sub-tab is divided into three general areas: Tips, Events data, and Filter.

The Tips segment provides an overview of the sub-tab. Collapse this information in order to have more room for viewing the Events data.

The Filters area provides filters for applying filter criteria to the events data. Collapse this area in order to have more room for viewing the Events data.

Note: Establish the default collapse status for the Tips and Filters areas on this sub-tab by selecting:
Tools | User Preferences | CMET tab | Events sub-tab.
The check boxes on this sub-tab will establish the collapse status.

The default filters are established on the **CMET** tab (**Events** sub-tab) of user preferences. These filters include Category, Status, Time Frame, and Community. See Section 3.1.1 for more information about these filters.

Columns on the **Events** sub-tab can be filtered. This is a temporary filter and will be lost after exiting the application.

The initial Data Mining will return the most recent occurrence of every event found with an established timeframe. These events are displayed on the **Events** sub-tab. See Section 3.1.1 for more information about the timeframes.

4.2.1.1 Filter Group Box

Use the filter features shown in the **Filters** group box. Filter the events by using one or more of the following: Category, Status, Time Frame, or Community. Then, use the **Get Events** button to re-display the events.

Get Events: After changing the filters in the **Filters** group box, click the **Get Events** button to update the display.

Save: After changing the filters in the **Filters** group box, click **Save** to set them as the default filters. This means those filters will be in effect in another iCare session. This action changes the filters in User Preferences (on the CMET tab).

Restore to User Pref: To return to the last-saved CMET filters in **User Preferences**, click the **Restore to User Pref** button.

4.2.1.2 Events Sub-Tab Layout

The data on the **Events** sub-tab is current as of the date/time on the toolbar.

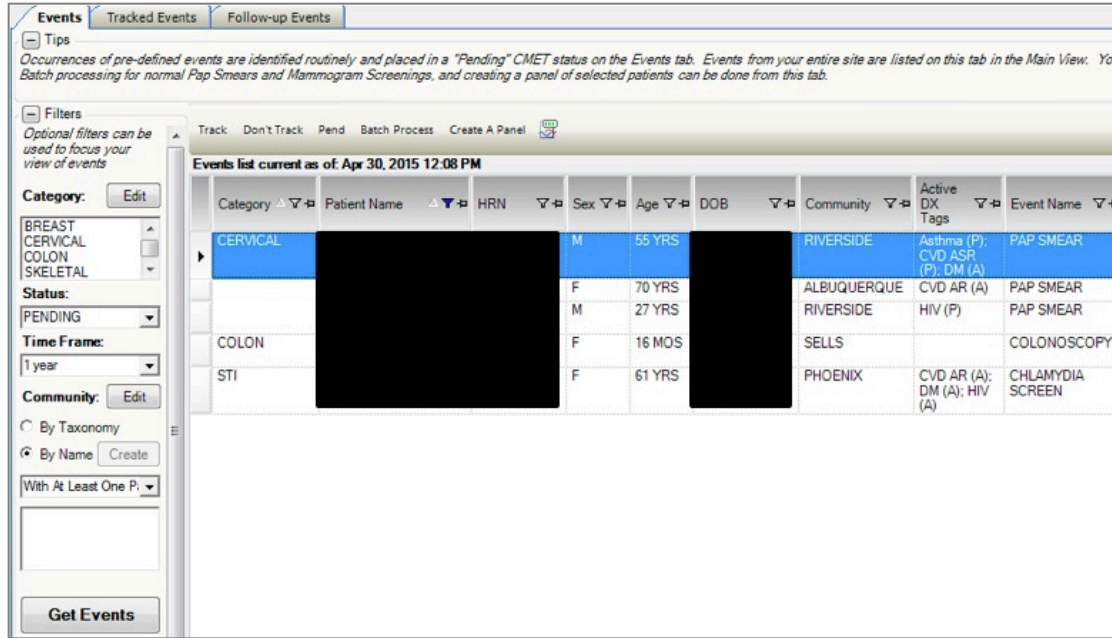


Figure 4-10: Columns on **Events** sub-tab


Table 4-1 provides information about the columns on the **Events** sub-tab.

Table 4-1: **Events** sub-tab column names and descriptions

Column Name	Meaning
Category	The name of the category for the event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
Patient Name	Required field and will link to the Events sub-tab of the CMET tab on the Patient Record by double-clicking on it.
HRN	Patient's Health Record Numbers.
Sex	F (for female), M (for male) or U (for unknown)
Age	Patient's age today.
DOB	Patient's date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function (Proposed or Accepted).
Event Name	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Expanded Event	Displays event information.
Event Date	The date associated with the event.

Column Name	Meaning
Result	The date of the result of the event. This cell also has hover help, which identifies where the result comes from such as V Radiology, V Lab or Women's Health packages.
Expanded Result	Displays result information.
Status	The status of the event: Pending, Superseded, Tracked, or Not Tracked.
Status Comments	Text of the any comments about the status.
Last Modified Date/Time	The date the event was last modified
Last Modified By	The name of the person who last modified the event (in some cases it will read "Initial job").

The default sort order is as follows: **Category**, **Date of Event** (newest listed first), **Patient Name** (in alphabetical order).

A **Community** cell may contain the **Community Alert** () icon. View the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the Community column.

View the **CMET - Visit Detail** pop-up for any underlined date in the **Event Date** column by double-clicking the date.

View a particular detail pop-up for any underlined date in the **Result** column by double-clicking the date.

If there is an older event with a status of **Pending** and a new event comes in, the application changes the status of the older event to **Superseded**. This type of event cannot be tracked.

4.2.1.3 Buttons on Events Sub-Tab

Please consider the following:

To view an event status, change the **Status** field in the **Filters** group box. For example, if the status of an event is changed to Tracked, change the Status to Tracked (or All) and click **Get Events**.

4.2.1.3.1 Track Button

The **Track** function requires the iCare Editor (BQIZCMED) security key. Select one or more events with a status of Not Tracked or Pending and then click the **Track** button (or select **Track** on the context menu).

Once an event has been Tracked, it cannot be changed to Not Tracked. If the particular event was incorrectly changed to Tracked, go to the **Tracked** tab and access the CMET worksheet for the event tracked in error.

If selecting events that are not eligible for the Tracked function, the application displays the message: “Events having a status of Tracked can’t be changed to Tracked.” Click **OK** to dismiss the message.

If selecting only one eligible event, the application displays the **RPMS iCare - Track - Findings Due Date** dialog.

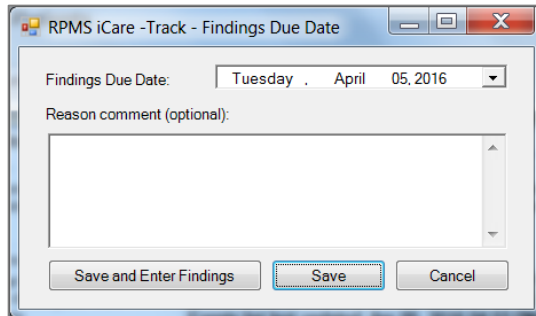


Figure 4-11 **RPMS iCare - Track - Findings Due Date** dialog

If selecting more than one eligible event, the application displays **the RPMS iCare - Track - Findings Due Date** dialog for multiple events.

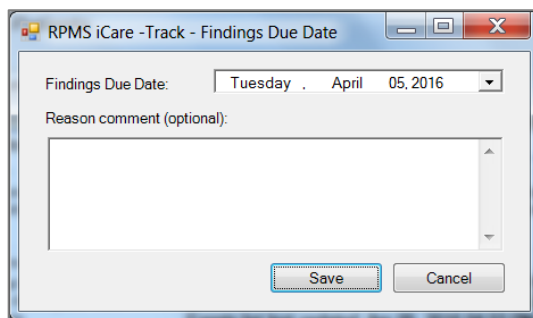


Figure 4-12: **RPMS iCare - Track - Findings Due Date** dialog for multiple events

In either case, do the following:

- Make sure that the correct date is in the **Findings Due Date** field (required). To change it, click the list to access a calendar and select another date. The date cannot be earlier than the current date.
- Type the text of the reason for changing the status to **TRACKED** in the [Free Text](#) field (not required).
- Click **Save** to save the information (otherwise, click **Cancel**). and change the status of the events to Tracked. These events will display on the **Tracked Events** sub-tab of the main window.

If using the **Save and Enter Findings** button for a single event, the application displays the CMET Worksheet (where users can add Findings to the event, for example). See Section 4.2.4 for more information about the worksheet. Save the worksheet to return to the **Events** sub-tab.

4.2.1.3.2 Don't Track Button

Use the **Don't Track** function to change the status of a Pending event to Not Tracked. Select the events and click **Don't Track** (or select **Don't Track** on the context menu).

If a user selects **Tracked** events, they are not eligible for the **Not Tracked** function. In this case, the application displays the message: "Once an event has been Tracked, it cannot be changed to Not Tracked. See the User Manual guidance on how to manage an event that was tracked." Click **OK** to dismiss the message. If the selected Tracked event was tracked in error, Section 4.2.5 provides information on how to handle this error.

If the user selected eligible events, the application displays the **RPMS iCare – Don't Track Event** dialog.

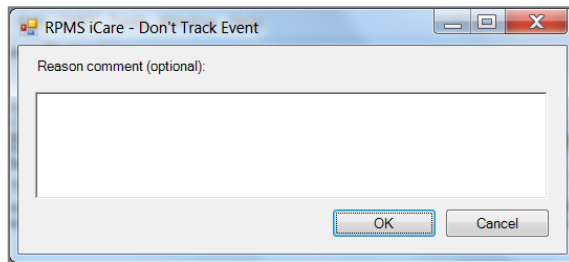


Figure 4-13: **RPMS iCare – Don't Track Event** dialog

Type a reason for the change in the [Free Text](#) field (not required). Click **OK** to save and to change the Status of the events to **Don't Track**. (Otherwise, click **Cancel**.)

4.2.1.3.3 Pend Button

Use the **Pend** button to change the status of a Not Tracked event to Pending. Select the events and then click the **Pend** button (or select **Pend** on the context menu).

If the user selects events that are not eligible for the Pend function, the application displays the message: "Only events with status of Not Tracked can change to Pending." Click **OK** to dismiss the message.

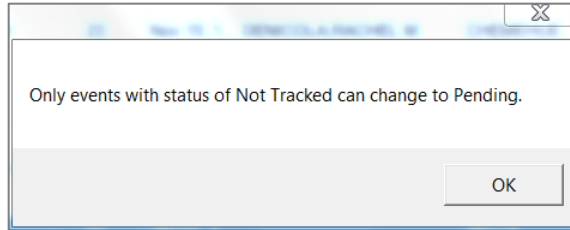


Figure 4-14: Pend function message

If the user selected eligible events, the application displays the **RPMS iCare – Pend Event** dialog.

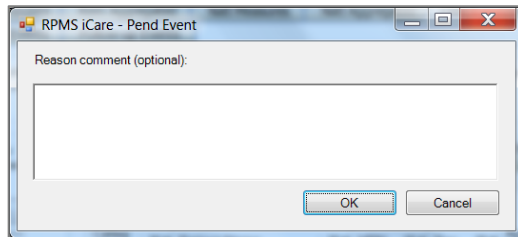


Figure 4-15: **RPMS iCare – Pend Event** dialog

Type a reason for the change in the [Free Text](#) field (not required). Click **OK** to save and to change the Status of the events to **Pending**. (Otherwise, click **Cancel**.)

4.2.1.3.4 Add Manual Event

Use **Add Manual Event** function to add manual events.

The **Add Manual Event** function requires the iCare Editor (BQIZCMED) or iCare Package Manager (BQIZMGR) security key.

Add a new manual event by doing one of the following:

- Click the **Add Manual Event** ([Add Manual Event](#)) button
- Select **CMET | Events | Add Manual Event**

The **Select Patients** window opens. (This does not apply when used on the **Patient Record** screen).

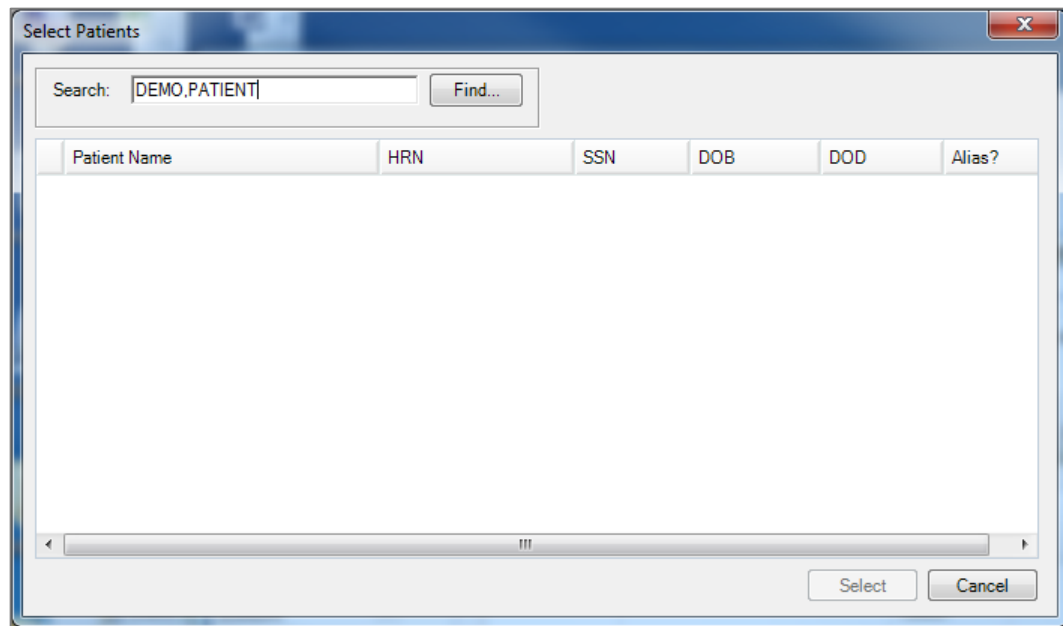


Figure 4-16: **Selected Patients** dialog

The **Add Manual Event** window opens.

Add Manual Event

Patient Name: DEMO,PATIENT

Date*: 06/13/2019

Event*:

PCC File*:

Default Value*:

Finding:

Location:

IHS / Tribal Facility
2016 DEMO HOSPITAL ...

Other

Hospital Location*:

Outside Location:

Outside Provider:

Findings comment (optional):

Save Save and Track Save, Track and Open Worksheet Exit

Figure 4-17: **Add Manual Event** dialog

The fields with the asterisk (*) following the name are required.

Date: Select a date for the event.

Event: Select the event.

PCC File: Select the PCC File.

Default Value: Select a default value for the event.

Finding: Select a finding, if desired, for the event.

Select Location:

- **IHS/Tribal Facility:** Select a **Location**

or

- **Other:** Enter **Outside** Location and if desired, **Outside Provider**

Hospital Location: If the Location is the IHS Facility, an internal location is needed.

Findings Comment: Enter a comment for the finding, if desired.

Click **Save** to save a new manual event.

Click **Save and Track** to save and track a new manual event, which has the same behavior as the **Track** button.

Click the **Save, Track and Open Worksheet** button to save a new manual event, track, and open a CMET worksheet. This has the same behavior as the **Open CMET Worksheet** button (Section 4.2.2.3.4) on the **Tracked Events** tab.

4.2.1.3.5 Batch Processing Button

The Batch Process only applies to screening mammograms and Pap smears with normal results. This process can be applied to multiple events. Although it can be applied to one event, its purpose is to be applied to multiple events.

The CMET Package Manager sets the parameters for batch processing for the entire site. The Batch Process function requires the iCare Editor (BQIZCMED) security key.

The Batch Process works only on events that are Pending.

- If the user selects a mammogram screening or Pap smear event that is not Pending, the application displays the **Invalid Selection** message: “Please select only PENDING Events in order to process these as a batch.” Click **OK** to dismiss the message.

If the user selects an event that is not a mammogram screening or Pap smear, the application displays the **Invalid Selection** message: “The event type selected is not eligible for batch processing. Please reselect.” Click **OK** to dismiss the message.

Select either the mammogram screening events, or the Pap smear events to batch process. Then, click the **Batch Process** button or select **Batch Process** on the context menu to batch process the selected events and to change the Status/State to Closed. The selected events must be of the same type of event, either all mammogram screenings or all Pap smears.

- If the user selected the mammogram screening events that are eligible for this process, the application displays the CMET Batch **Mammogram Screening** dialog. See Section 4.2.1.4 for more information about this dialog.

- If the user selects the Pap smear events that are eligible for this process, the application displays the **CMET Batch Pap Smear** dialog. See Section 4.2.1.5 for more information on this dialog.

4.2.1.3.6 Create a Panel Button

Use the **Create Panel** function to create a panel from selected events. The patients associated with the events become the patients in the new panel. Select the events and click the **Create Panel** button (or select **Create Panel** on the context menu) to access the **Create Panel** dialog.

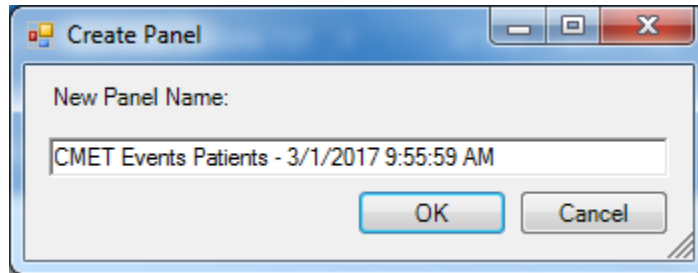


Figure 4-18: **Create Panel** dialog

Change the name of the new panel in the New Panel Name [Free Text](#) field.

Click **OK** to create the panel (otherwise, click **Cancel**). After the Create process finishes, the application displays a message: “Panel created successfully!” Click **OK** to dismiss the message. The new panel is listed on the **Panel List** window. It uses the **No Predefined Population Search - Add Patients** manually population search option.

4.2.1.3.7 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the **Background Jobs** (📁) button
- Select **File | Background Jobs**

The **RPMS iCare - Background Jobs** window will display.

4.2.1.4 CMET Batch Mammogram Screening Dialog

The batch process for mammogram screenings changes the events to have a Status of Tracked, the Event State of Closed, and the Close Reason of Event Complete.

CMET Batch Mammogram Screening

Batch Parameters
Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram
The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram), Follow up Date and Notification Type can be changed

Status: TRACKED

Event Finding*: BI-RAD CATEGORY 1 - NEGAT Finding Interpretation: Normal

Follow-up Event: MAMMOGRAM SCREENING Follow-up In*: 1 year

Notification Type*: LETTER Notification Date*: 06/27/2010

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Add (F2) Delete (Del)

Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010

OK Cancel

Figure 4-19: **CMET Batch Mammogram Screening** dialog

After completing the dialog, click **OK** to save the data on the dialog. (Otherwise, click **Cancel**.)

4.2.1.4.1 Fields on the Dialog

Required fields are marked with an asterisk (*) following the field name.

Status: This is the status of the event (view only).

Event Finding: This indicates the event finding. The list contains the options to populate/change this field.

Finding Interpretation: This field provides the interpretation of the finding (view only).

Follow-up Event: This is the follow-up event (view only).

Follow-up In: This is the time frame for the follow-up. The list contains the options to populate/change this field.

Notification Type: This is the type of patient notification for the event. Select an option from the list. The options on the list are defined by the application (sites cannot add values).

Create: The **Create** button is active when the Notification Type is Letter, Certified Letter, or Telephone. This function requires an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. See Section 4.2.6 for more information on this dialog.

Notification Date: This is the date for the patient notification. The list contains a calendar from which to select a date.

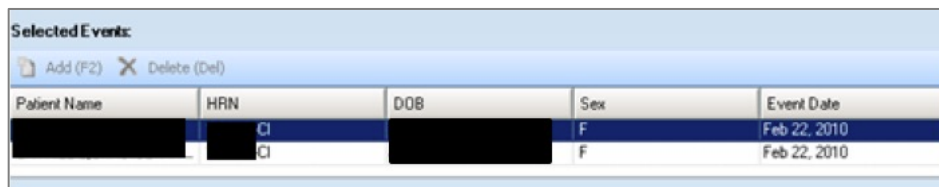
Event State: This shows the state of the event (view only).

Close Reason: This is the reason why the status is closed (view only).

Comment: Use this [Free Text](#) field to enter any comments pertaining to the mammogram screenings.

4.2.1.4.2 Selected Events Group Box

The **Selected Events** group box contains the selected patients for batch processing (these are the events selected for the process). This is read-only information.




Selected Events:				
 Add (F2)	 Delete (Del)			
Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	CI	[REDACTED]	F	Feb 22, 2010
[REDACTED]	CI	[REDACTED]	F	Feb 22, 2010

Figure 4-20: **Selected Events** group box

4.2.1.5 CMET Batch Pap Smear Dialog

The batch process for Pap smears changes the events to have a Status of Tracked, the Event State of Closed, and the Close Reason of Event Complete.

CMET Batch Pap Smear

Batch Parameters
Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram.
The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram): Follow up Date and Notification Type can be changed.

Status: TRACKED

Event Finding: NEGATIVE Finding Interpretation: Normal

Follow-up Event: PAP SMEAR Follow-up In*: 1 year

Notification Type*: LETTER Notification Date*: 06/27/2010

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Add (F2) Delete (Del)

Patient Name	HRN	DOB	Sex	Event Date
	CI		F	Jul 02, 2009
	CI		F	Jul 06, 2009
	CI		F	Jul 06, 2009

OK Cancel

Figure 4-21: CMET Batch Pap Smear dialog

After completing the dialog, click **OK** to save the data. (Otherwise, click **Cancel**.)

4.2.1.5.1 Fields on the Dialog

Required fields are marked with an asterisk (*) following the field name.

Status: This field displays the status of the event (view only).

Event Finding: This indicates the event finding (view only).

Finding Interpretation: This provides the interpretation of the finding (view only).

Follow-up Event: This displays the follow-up event (view only).

Follow-up In: This is the time frame for the follow-up. The list contains options to populate/change this field.

Notification Type: This is the type of patient notification for the event. Select an option from the list. The options on the list are defined by the application (sites cannot add values).

Create: The **Create** button is active when the Notification Type is Letter, Certified Letter, or Telephone. This function requires an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. See Section 4.2.7 for more information about this dialog.

Notification Date: This is the date for the patient notification. The list contains a calendar from which to select a date.

Event State: This shows the state of the event (view only).

Close Reason: This is the reason when the status is closed (view only).

Comment: Use this [Free Text](#) field to enter any comments pertaining to the Pap smear screenings.

4.2.1.5.2 Selected Events Group Box

The **Selected Events** group box contains the selected patients for batch processing (these are the events selected for the process). This is read-only information.



Patient Name	HRN	DOB	Sex	Event Date
	CI		F	Jul 02, 2009
	CI		F	Jul 06, 2009
	CI		F	Jul 06, 2009

Figure 4-22: **Selected Events** group box

4.2.2 Tracked Events Sub-Tab

The **Tracked Events** sub-tab displays all events at your site that have been selected to be Tracked. This could be a very large number of events; limit this display by applying additional filters to the view. Filtering in this manner does not affect the routine background job.

Category	1 - Event	Event Date	Result	2 - Finding(s)	Findings Summary	Interpr
BREAST	BREAST REDUCTION	Feb 09, 2017				
CERVICAL	PAP SMEAR	Feb 27, 2017	✓		Finding: HSIL Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 08:00:31	Abnorm
	PAP SMEAR	Feb 27, 2017	✓		Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 08:19:23	Normal
	PAP SMEAR	Feb 27, 2017	✓		Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 11:19:26	Normal
STI	CHLAMYDIA SCREEN	Feb 27, 2017	✓		Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 14:09:27	Normal
	CHLAMYDIA SCREEN	Feb 23, 2017	✓		Finding: NEGATIVE Finding Date: FEB 23, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 23, 2017 10:19:06	Normal
	CHLAMYDIA SCREEN	Feb 23, 2017				
	CHLAMYDIA SCREEN	Feb 23, 2017				
	CHLAMYDIA SCREEN	Feb 16, 2017				
	CHLAMYDIA SCREEN	Jan 18, 2017				
	CHLAMYDIA SCREEN	Jan 18, 2017				

Figure 4-23: **Tracked Events** sub-tab

Findings are abbreviated results and have been pre-defined for each event. Results are received and reviewed by the clinician and the appropriate Finding value is entered. Multiple Findings can be entered for each Event. Each Finding value has an associated, auto-assigned Interpretation of either Normal, Abnormal, or NA.

The CMET Worksheet is used to capture CMET activity for individual patients.

Batch Processing can be used to process multiple patients with normal results for Pap Smear or Mammogram Screenings.

The information on this sub-tab is divided into three general areas: Tips information, Tracked Events data, and Filter area.

The Tips information provides an overview of the sub-tab. Collapse this information to increase room for viewing the Tracked Events data.

The Filters area provides filters for applying filter criteria to the tracked events data. Collapse this area to increase room for viewing the tracked events data.

Note: Establish the default collapse status for the Tips and Filters areas on this sub-tab. To do that, select **Tools | User Preferences | CMET tab | Tracked Events** sub-tab. The check boxes on this sub-tab will establish the collapse status.

The default filters are established on the **CMET** tab (**Tracked Events** sub-tab) of user preferences. These filters are: Category, State, Time Frame, and Community. See Section 4.2.2.1 for more information about these filters.

Users can also filter the columns on the **Tracked Events** sub-tab. This is a temporary filter that will be lost once the user exits the application.

4.2.2.1 Filter Group Box (Tracked Events)

Use the filter features shown under the **Filters** group box. Filter the events by using one or more of the following: Category, State, Time Frame, and Community. Next, click the **Get Events** button to re-display the events.

The **Get Events**, **Save**, and **Restore to User Pref** buttons work like those on the **Events** sub-tab.

4.2.2.2 Tracked Events Sub-Tab Layout

The data on the **Tracked Events** sub-tab is effective as of the date/time on the toolbar.

Table 4-2 provides information about the columns on the **Tracked Events** sub-tab.



Table 4-2: **Tracked Events** column names and meanings

Column Name	Meaning
Category	The name of the category for the tracked event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
1 - Event	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Event Date	The date the event was performed.
Result	The date the result was entered. Hover help will describe the source of the result (V-RADIOLOGY, V-LAB).
2 - Finding(s)	An icon that indicates if the event has any Findings.
Finding Summary	Summary of findings.
Interpretation	The interpretation of the selection in the Result field. There is hover help for this field, e.g., CMET, that refers to the source of the interpretation.
3 - Follow-up(s)	An icon that indicates if the event has any follow-up data.
4 - Patient Notification(s)	An icon that indicates if the event has any patient notification data.
State	The state of the tracked event (open or closed). The default is OPEN.
Patient Name	A required field that will link to the Tracked Events sub-tab of the CMET tab on the Patient Record by double-clicking on it.



Column Name	Meaning
HRN	Patient's health record number (required).
DOB	Patient's date of birth (required)
Age	Patient's age today.
Sex	F (for female) or M (for male)
Community	Patient's community of residence.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function (Proposed or Accepted).
Tracked By	The person who tracked the event.
Tracked When	The date the event was tracked.

The use of icons (checkmarks and feathers) on this sub-tab creates an easy-to-read review of the CMET activity display.



The **Finding(s)** cell can contain the following:

- The feather () icon indicates that a Finding entry is overdue based on the Tickler timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that the Finding has been entered. Hover the mouse over the icon to view the Finding Due date and the Finding Value.
- An empty cell indicates that a finding has not been entered and is not past due.

The **Follow-up(s)** cell can contain the following:

- The feather () icon indicates that a recommended follow-up entry is overdue based on Tickler timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that a follow-up has been entered. Hover the mouse over the icon to view the Follow-up Date and the Follow-up type.
- An empty cell indicates that a decision regarding the Follow-up has not been entered and is not past due.

The **Patient Notification(s)** cell can contain one of the following:

- The feather () icon indicates that the type of patient notification is overdue based on Tickler timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that the type of Patient Notification has been entered. Hover the mouse over the icon to view the notification date and type.
- An empty cell indicates that the type of Patient Notification has not been entered but is not past due.

Remember that Finding(s), Follow-up(s), and Patient Notification(s) are entered on the CMET Worksheet.

If a Community cell contains the Community Alert (📡) icon, view the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the Community column.

View the **CMET -Visit Detail** Pop-up Functionality for any underlined date in the **Event Date** column by double-clicking the date.

Double-click the underlined date in the **Result Date** column to access a particular detail pop-up, for example, Women’s Health Detail.

4.2.2.3 Buttons on Tracked Events Sub-Tab

4.2.2.3.1 Reopen

Use the **Reopen** function to change a Closed event to Open. Select only one event with a State of Closed and click the **Reopen** button (or select **Reopen** on the context menu). The application displays the **RPMS iCare – Reopen Tracked Event** dialog.

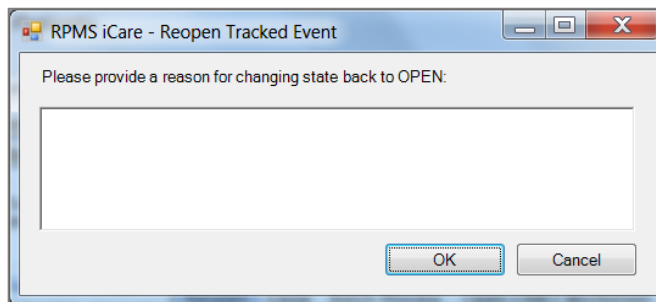


Figure 4-24: **RPMS iCare – Reopen Tracked Event** dialog

Type the reason for changing the state back to Open in the [Free Text](#) field (not required). When the dialog is complete, click **OK** to change the State for the event to **Open**. (Otherwise, click **Cancel**.)

If the user selects more than one event and uses the **Reopen** function, the application displays the warning message: “Please reselect as only one event can be reopened at one time.” Click **OK** to close the warning message and select only one event to continue.

4.2.2.3.2 Close

Use the **Close** function to change an Open event to Closed. Select the events with a State of Open and click the **Close** button (or select **Close** on the context menu). The application displays **RPMS iCare – Reason for Closing** dialog.

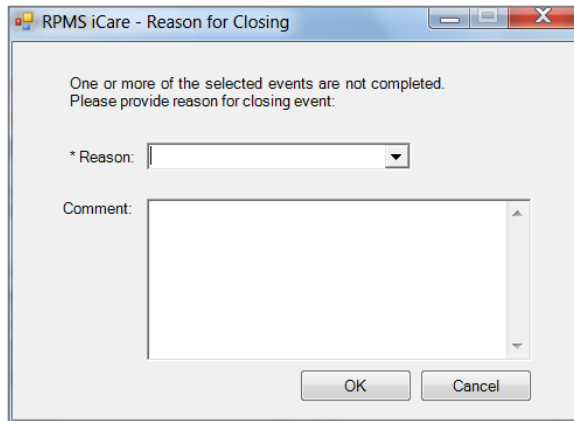


Figure 4-25: **RPMS iCare – Reason for Closing** dialog

Required fields are marked with an asterisk (*) following the field name.

Reason: Select an option from the list—Event Complete, Patient Moved, Lost to Follow-up, Other (this option requires a comment).

Comment: This [Free Text](#) field is required when the Reason is set to **Other**. Type the text of the reason.

When the dialog is complete, click **OK** to change the State for the selected events to Close. (Otherwise, click **Cancel**.)

4.2.2.3.3 **Batch Process**

The Batch Process only applies to screening mammograms and Pap smears with normal results. This process works on Open events with empty cells (no ticklers or check marks) in the Findings, Follow-up, and/or Patient Notifications columns.

If the user selects events that are not eligible for the Batch Process, the application displays the message: “Please select only Tracked Events without Findings, Follow-ups, or Notifications in order to process these as a batch.” Click **OK** to dismiss the message.

Select one or more eligible events and click the **Batch Process** button (or select **Batch Process** on the context menu).

For mammogram screenings, see Section 4.2.1.4 for more information.

For Pap smears, see Section 4.2.1.5 for more information.

4.2.2.3.4 **Open CMET Worksheet**

Select an event and click the **Open CMET Worksheet** button (or select **Open CMET Worksheet** on the context menu) to access the CMET Worksheet (for the event). Enter Finding(s), Follow-up(s), and Patient Notification(s) for the event. See Section 4.2.4 for more information about the worksheet.

Note: This function can be applied to only one event.

4.2.2.3.5 Create Panel

Use the **Create Panel** function to create a panel from the selected events. The patients associated with the events become the patients in the new panel. Select the events and click the **Create Panel** button (or select **Create Panel** on the context menu).

4.2.2.3.6 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the **Background Jobs** (🔄) button
- Select **File | Background Jobs**

This displays the **RPMS iCare - Background Jobs** dialog.

4.2.3 Follow-up Events Sub-Tab

The **Follow-up Events** sub-tab contains events with a recommended follow-up. This sub-tab displays all of the follow-up events at your site that have been generated by all CMET users. This can be a very large number of events; limit this display by applying filters to the view. Filtering in this manner does not affect the routine background job.

Category	Follow-up Event Name	Follow-up Event Date	Ordered	Preceding Event	Patient Name	HRN
BREAST	MAMMOGRAM SCREENING	Feb 20, 2018	No	Feb 20, 2013		
	BREAST MRI	Mar 02, 2017	No	Feb 23, 2017		
	MAMMOGRAM SCREENING	Mar 10, 2015	No	Mar 13, 2014		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	MAMMOGRAM SCREENING	Feb 20, 2015	No	Feb 20, 2013		
	BREAST RECONSTRUCTION w/IMPLANTS	Jul 10, 2014	No	Mar 19, 2014		
	MAMMOGRAM SCREENING	Apr 03, 2014	No	Apr 03, 2013		
	MAMMOGRAM SCREENING	Mar 20, 2014	No	Mar 20, 2013		
	MAMMOGRAM SCREENING	Mar 18, 2014	No	Mar 18, 2013		

Figure 4-26: **Follow-up Events** sub-tab

Follow-up is the clinician's recommendation for what the next step will be, whether that is routine screening or further diagnostic studies. Users can enter multiple recommendations for Follow-up. This recommendation initiates a CMET Reminder.

The information on this sub-tab is divided into three general areas: Tips information, Follow-up Events data, and Filter area.

The Tips information provides an overview of the sub-tab. Collapse this information to have more room for viewing the Follow-up Events data.

The Filters area provides filters for applying filter criteria to the follow-up events data. Collapse this area to have more room for viewing the follow-up events data.

Note: Establish the default collapse status for the Tips and Filters areas on this sub-tab. To do that, select **Tools | User Preferences | CMET tab | Follow-up Events** sub-tab. The check boxes on this sub-tab will establish the collapse status.

Users can also change the filters on the columns on the **Follow-up Events** sub-tab. This is a temporary filter and will be lost once the user exits the application.

4.2.3.1 Filters Group Box (Follow-up Events)

Use the filter features shown under the **Filters** group box. Users can filter the events by one or more of the following: Category, Time Frame, and Community. Then, click the **Get Events** button to re-display the events. Section 4.2.1.1 provides more information about using the filters.

The **Get Events**, **Save**, and **Restore to User Pref** buttons work like those on the Events sub-tab. See Section 4.2.1.3 provides more information about this sub-tab.

4.2.3.2 Follow-up Events Sub-Tab Layout

The data on the **Follow-up Events** sub-tab is effective as of the date/time on the toolbar.


Users can sort/filter the columns and perform other functions on the columns.

Table 4-3 provides information about the columns on the **Follow-up Events** sub-tab.

Table 4-3: **Follow-up Events** sub-tab column names and meanings

Column Name	Meaning
Category	The name of the category for the follow-up event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.

Column Name	Meaning
Follow-up Event Name	The name of the event. This is the recommended follow-up entered in CMET.
Follow-up Event Date	The date of the recommended follow-up.
Preceding Event	This is the date of the preceding event. When a user double-clicks on the underlined date, the application opens to the Tracked Events of the CMET tab on the Patient Record. The chain of events in the same category is revealed. In addition, there is hover help when moving the mouse over the date (for example, PAP SMEAR).
Patient Name	Patient's name.
HRN	Patient's Health Record Number.
DOB	Patient's date of birth.
Age	Patient's current age.
Sex	F (for female) or M (for male)
Community	Patient's community of residence.

If a Community cell contains the Community Alert () icon, view the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the Community column.

Double-click any event (not on the **Preceding Event** cell), and the application displays the CMET Worksheet for the event. See Section 4.2.4 for more information about the worksheet.

4.2.3.3 Buttons on Follow-up Events Sub-Tab

The **Create Panel**, **Open CMET Worksheet**, and **Status of Background Jobs** buttons work like those on the **Tracked Events** sub-tab. See Section 4.2.2.3 for more information on the buttons.

4.2.4 CMET Worksheet

Use the Open CMET Worksheet button to access the CMET Worksheet for a selected event on the particular sub-tab of the CMET window. Find this button on the **Tracked Events** and **Follow-up Events** sub-tab on the CMET main window.

Use this worksheet to process the Care Management Events to track. Enter data related to Findings, Follow-up, and Patient Notification. The Site parameters “Due By” default dates set by the CMET Package Manager can also be edited in this screen.

Use this worksheet to process the Care Management Events that you have chosen to track. Enter data related to: Findings, Follow-up and Patient Notification. The Site parameters "Due By" default dates set by the CMET Package Manager can also be edited in this screen.

Patient Demographics
 DEMO.AMENDMENT ONE HRN: [REDACTED] Sex: FEMALE Age: 61 YRS DOB: [REDACTED]

1 - Event
 Event: PAP SMEAR Event Comment: [REDACTED]
 Event Date: MAY 12, 2014 Tracked By: [REDACTED]
 Category: CERVICAL Tracked Date: JUN 11, 2014 11:19:14
 Preceding Event: NONE State: CLOSED
 CMET Audit History: [View](#) Close Reason: Event Complete State Comment: [REDACTED]

2 - Findings
 Findings Due By: 06/11/2014 Result: [REDACTED] Follow-up Recommended?: Yes

Date	Finding	Interpretation	Comment	Follow-Up Needed?	Last Edited	L
Jun 11, 2014	NEGATIVE	Normal			Jun 11, 2014	K9

3 - Follow-ups
 Follow-up Decision Due By: 06/11/2014

Event	Date Due	Comment
PAP SMEAR	May 11, 2016	

4 - Patient Notifications
 Notification Due By: 06/11/2014

Date	Method	Comment
Jun 11, 2014	LETTER	

OK Cancel

Figure 4-27: CMET Worksheet dialog

When the worksheet is complete, click **OK** (otherwise, click **Cancel**).

After clicking **OK**, there are two cases:

- Case 1: If not all of the steps are complete, the application updates the data on the **Tracked Events** sub-tab.
- Case 2: If all of the steps are complete, the application will display the **Close Event** information message that states: "The event is eligible for closing as all four steps are completed. Do you want to close the event now?" Click **Yes** to close the event. Click **No** to keep the event open.

Close the event (by selecting **Yes** on the Close Event message) and the application displays the **RPMS iCare Reason for Closing** dialog. Select a reason for closing the event and provide a comment (required) about the closing. Click **OK** to save the reason for closing (otherwise, click **Cancel**).

After clicking **OK** on the **Reason for Closing** dialog, the application displays the **Save to RPMS?** dialog: “You have data changes pending. Do you want to save to RPMS now?” Click **Yes** to save the changes to RPMS. Click **No** to discard the changes.

After clicking **Cancel**, there are two cases:

- Case 1: If there are no changes on the worksheet, the application closes it.
- Case 2: If there are changes on the worksheet, the application displays the **Save to RPMS?** dialog: “You have data changes pending. Do you want to save to RPMS now?” Click **Yes** to save the changes to RPMS. Click **No** to discard the changes. Click **Cancel** to return to the CMET Worksheet.

4.2.4.1 Patient Demographics Group Box

The **Patient Demographics** group box shows the patient’s name, HRN, sex, age, and DOB.

4.2.4.2 1 - Event Group Box

The data in the **1 – Event** group box provides information about the event and allows users to change the State of the event, as well as provide comments about the Event and/or State. In addition, users can view the audit history of the event.

1 - Event			
Event:	PAP SMEAR	Tracked By:	[REDACTED]
Event Date:	MAY 12, 2014	Tracked Date:	JUN 11, 2014 11:19:14
Category:	CERVICAL	State:	CLOSED
Preceding Event:	NONE	Close Reason:	Event Complete
CMET Audit History:	View	Event Comment:	[Text Area]
		State Comment:	[Text Area]

Figure 4-28: **1 – Event** group box

State: This field defines the State of the event.

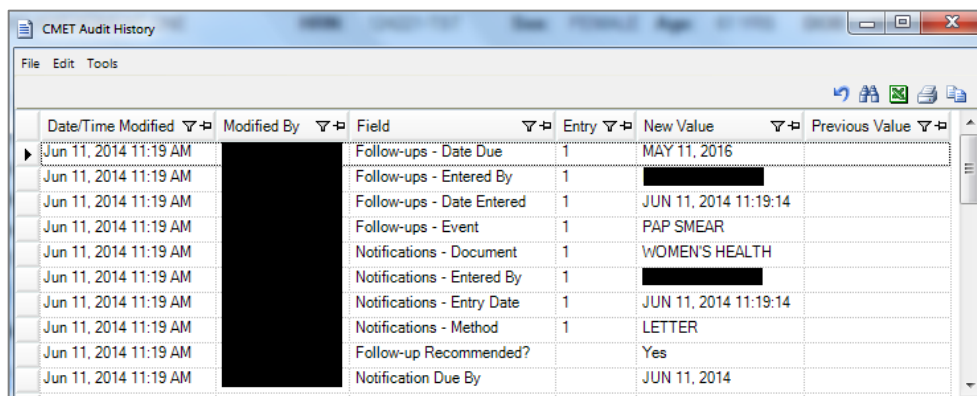
If the user populates the State field with Closed, then the **Close Reason** field becomes active. Select an option from the list that describes the reason for closing the event.

When an Event has a State of Closed, the other group boxes (Findings, Follow-up, Patient Notifications) will be inactive.

Event Comment: Use this [Free Text](#) field to add comments about the Event.

State Comment: Use this [Free Text](#) field to add comments about the State.

CMET Audit History: If the user clicks the **View** label, the application will display the **CMET Audit History** pop-up.



Date/Time Modified	Modified By	Field	Entry	New Value	Previous Value
Jun 11, 2014 11:19 AM		Follow-ups - Date Due	1	MAY 11, 2016	
Jun 11, 2014 11:19 AM		Follow-ups - Entered By	1		
Jun 11, 2014 11:19 AM		Follow-ups - Date Entered	1	JUN 11, 2014 11:19:14	
Jun 11, 2014 11:19 AM		Follow-ups - Event	1	PAP SMEAR	
Jun 11, 2014 11:19 AM		Notifications - Document	1	WOMEN'S HEALTH	
Jun 11, 2014 11:19 AM		Notifications - Entered By	1		
Jun 11, 2014 11:19 AM		Notifications - Entry Date	1	JUN 11, 2014 11:19:14	
Jun 11, 2014 11:19 AM		Notifications - Method	1	LETTER	
Jun 11, 2014 11:19 AM		Follow-up Recommended?		Yes	
Jun 11, 2014 11:19 AM		Notification Due By		JUN 11, 2014	

Figure 4-29: **CMET Audit History** pop-up

Because multiple users work on the events, the Audit History provides a history of those activities.

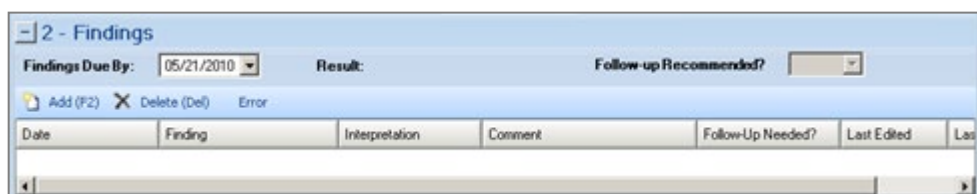
State: This determines the state of the event, either Open or Closed. If the state is set to **Closed**, the **Close Reason** field becomes active.

If the state is Closed, all of the other group boxes (**2 - Findings**, **3 - Follow-ups**, **4 - Patient Notifications**) become inactive.

Close Reason: This field is active when State is **Closed**. Select an option from the list that gives the reason for closing the event.

4.2.4.3 2 - Findings Group Box

Use the **2 - Findings** group box to enter Findings data about the event.



2 - Findings

Findings Due By: 05/21/2010 Result: Follow-up Recommended?

Add (F2) Delete (Del) Error

Date	Finding	Interpretation	Comment	Follow-Up Needed?	Last Edited	Last

Figure 4-30: **2 - Findings** group box

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the other group boxes (e.g., Follow-ups and Patient Notifications).

The **Findings Due By**, **Result**, and **Follow-up Recommended?** fields become populated when using the **Add** button on the grid and saving the record.

Findings Due By: This field displays the date the findings of this event are due. If this date passes without an entry, a Tickler (a reminder marked by a Feather icon) is generated.

Result: This field displays the date of the result. If this field contains an underlined date, click on the date to display the result details. For example, below is the Radiology Case Number Detail [pop-up](#).

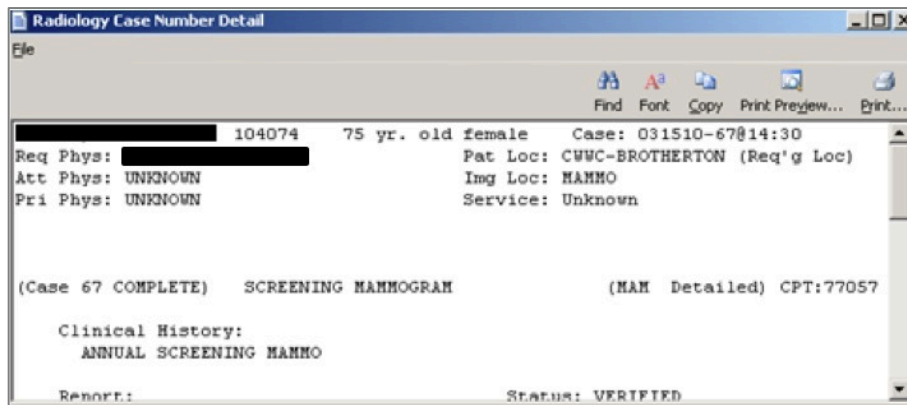


Figure 4-31: **Radiology Case Number Detail** dialog

Follow-up Recommended?: This field indicates if follow-up is recommended (Yes or No).

4.2.4.3.1 Add Button

Use the **Add** button to create a new Findings record. Click the **Add** button (or press F2 on the keyboard) to access the **Findings** dialog.

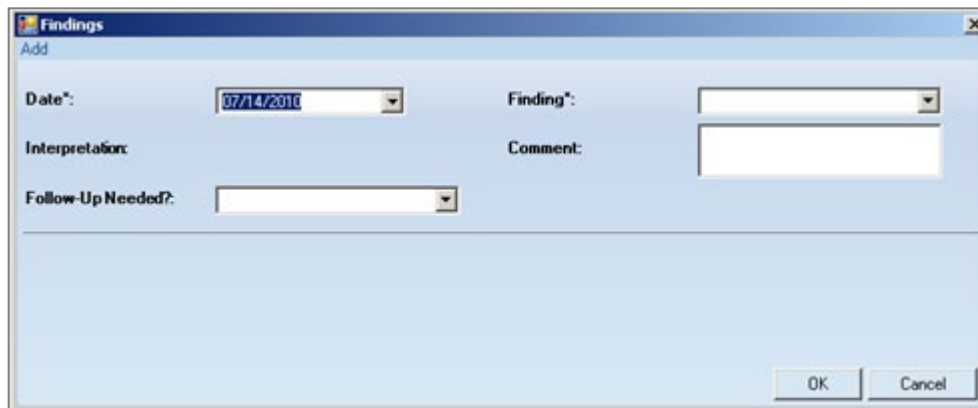


Figure 4-32: **Findings** dialog

Required fields are marked with an asterisk (*) following the field name.

Date: Click the box and select a date for the finding.

Finding: This is the finding associated with the event. Use an option from the list to populate this field.

Interpretation: The application populates this field, based on the selection in the Finding field.

Comment: Type the text of the comments about the Finding, if appropriate, in this [Free Text](#) field.

Follow-up Needed: Select an option from the list: **Yes** or **No**.

Click **OK** to save the data on the **Findings** dialog (otherwise, click **Cancel**).

After saving the data, the application populates the grid with the record and populates the **Last Edited** (current logon user) and **Last Edited By** (current date) columns.

Saving and selecting **Yes** for the **Follow-up Needed?** field on the **Findings** dialog will cause the **Follow-up Recommended?** field on the grid to be populated with **Yes**. The application will automatically display the Follow-Ups dialog (where users can enter follow-up data).

4.2.4.3.2 Delete Button

The **Delete** function applies to events that had Findings entered but *not* saved.

If the user selects an event that is not eligible for the **Delete** function, the application displays the message: “Unable to delete a previously saved entry. Please mark as ‘Entered in Error’ instead.” Click **OK** to dismiss the message.

Select one or more eligible Findings records to delete and click the **Delete** button (or press the **Delete** button). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.2.4.3.3 Error Button

Use the **Error** button when Findings records have been saved and cannot be deleted but should be marked as **Entered in Error**.

If the user selects a record that is not eligible for the Error function, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Findings records and click the **Error** button. After using this function, the application places a strikethrough mark on the record text.



Figure 4-33: Entered in Error marking

After saving and returning to the **Tracked Events** tab, the **Result** column for the event will be blank for the particular event.

4.2.4.4 3 - Follow-ups Group Box

Use the **3 – Follow-ups** group box to add follow-up data about the event.

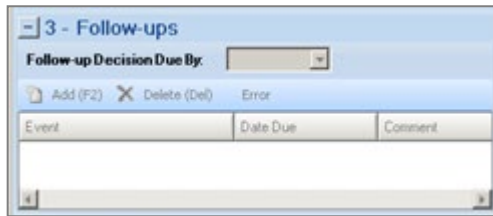


Figure 4-34: **3 – Follow-ups** group box

The **Follow-ups** group box becomes active when the **Follow-up Recommended** field (in the **Findings** group box) is set to Yes.

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the other group box (e.g., Patient Notifications).

Follow-up Decision Due By: Select a date from the list that indicates when the follow-up decision should be made. Populating the field creates a tickler (feather icon) for the event. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters. Populate this field with the date to take action on the event.

4.2.4.4.1 Add Button

Use the **Add** button to create a new Follow-up record. Click the **Add** button (or press the F2 button) to access the **Follow-Ups** dialog.

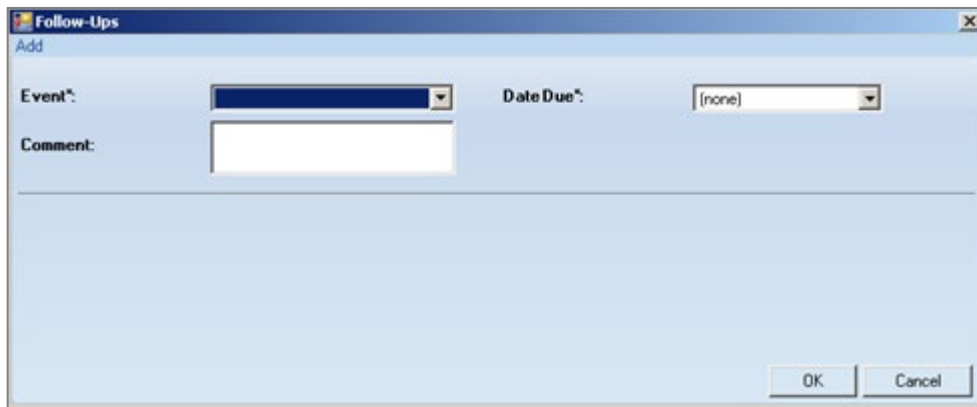


Figure 4-35: **Follow-Ups** dialog

Required fields are marked with an asterisk (*) following the field name.

Event: Select an option from the list that describes the Event for the follow-up.

Date Due: Use the list to display a calendar from which to select the due date for the follow-up event.

Comment: Type text in this [Free Text](#) field to add comments about the follow-up.

Click **OK** to save the data on the dialog (otherwise, click **Cancel**). After saving, the follow-up record will display in the **3 - Follow-ups** group box on the CMET Worksheet.

4.2.4.4.2 Delete Button

The **Delete** function applies to events that had Follow-ups entered but *not* saved.

Select one or more eligible Follow-up records to delete and click the **Delete** button (or press Delete). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.2.4.4.3 Error Button

Use the **Error** button when Follow-up records have been saved and cannot be deleted but should be marked as Entered in Error.

If the user selects a record that is not eligible for the Error button, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Follow-up records and click the **Error** button. After using this function, the application places a strikethrough mark on the text of the record.



Figure 4-36: Follow-up record marked as entered in error

4.2.4.5 4 - Patient Notifications Group Box

Use the **4 - Patient Notifications** group box to add patient notification data about the event.

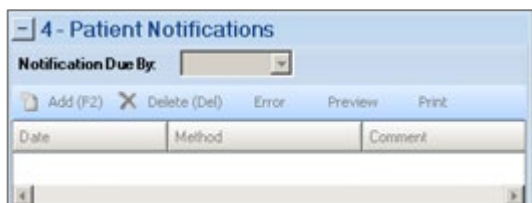


Figure 4-37: **4 - Patient Notifications** group box

The **Patient Notification**, the final step, makes the patient aware of both the results and the recommendations for follow-up. Multiple types of Patient Notifications can be entered for each Event.

The **Patient Notifications** group box becomes active when a finding is entered in the **Findings** group box.

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the **Follow-ups** group box.

Notification Due By: Enter the date to have the patient notified about the results and recommendations of the follow-up related to this event. If this date passes without an entry, a tickler (feather) icon will be generated. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters.

4.2.4.5.1 Add Button

If a default clinic is not defined in user preferences, the application displays the following message: “You must select default clinics in user preferences before being able to enter notes.” Click **OK** to dismiss the message. Select **Tools | User Preferences** to access the **RPMS iCare – User Preferences** dialog. Go to the **Patient View** tab to enter the clinic codes.

Use the **Add** button to create a new Patient Notification record. Click the **Add** button (or press F2) to access the **Notifications** dialog.

Figure 4-38: **Notifications** dialog

Required fields are marked with an asterisk (*) following the field name.

Date: The default date is today’s date. Change it by clicking the list to access a calendar and select another date.

Method: Select an option from the list that identifies the type of notification.

Create: This button becomes active when selecting Certified Letter, Letter, or Telephone in the **Method** field. An electronic signature must be on file before using this function.

If an electronic signature is on file, click the **Create** button to access the **Add TIU Note** dialog.

Comment: Use this [Free Text](#) field to add any comments about the notification.

After completing this dialog, click **OK** to save the data (otherwise, click **Cancel**). After saving, the notification record will display in the **4 - Patient Notifications** group box on the CMET Worksheet.

4.2.4.5.2 Delete Button

The **Delete** function applies to events with Patient Notifications entered but *not* saved.

Select one or more eligible Patient Notification records to delete and click the **Delete** button (or press Delete). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.2.4.5.3 Error Button

Use the **Error** button when Patient Notification records have been saved and cannot be deleted and need to be marked as Entered in Error.

If the user selects a record that is not eligible for the Error function, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Patient Notification records and click the **Error** button. After using this function, the application places a strikethrough mark on the text of the record.

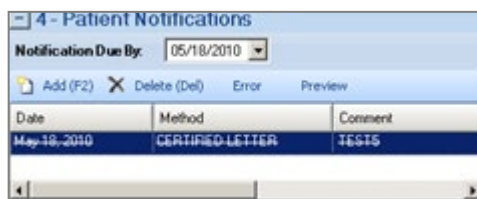


Figure 4-39: Patient Notification record marked as entered in error

4.2.4.5.4 Preview

Use the **Preview** function to preview the letter associated with the selected Patient Notification record. This function only applies to records that are Letters, Certified Letters, or Telephone.

Select the record to preview and then click the **Preview** button. The application displays the **Letter Preview** [pop-up](#).

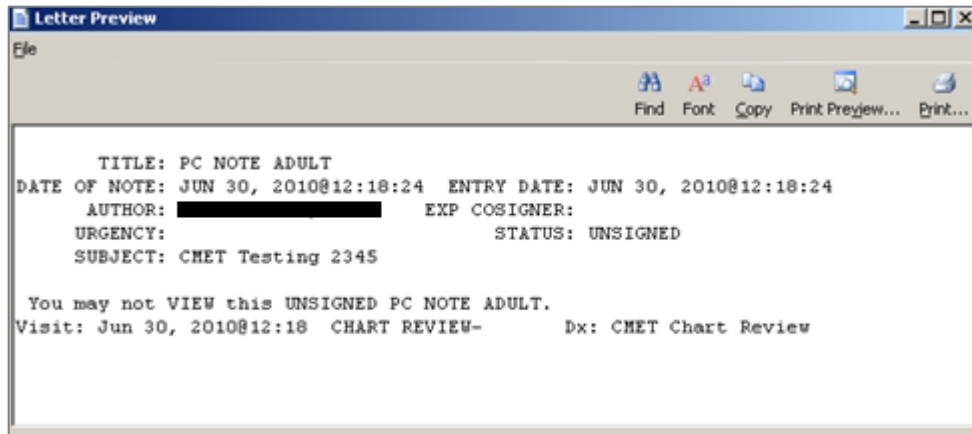


Figure 4-40: **Letter Preview** pop-up

4.2.4.5.5 Print Button

Use the **Print** button to output a letter in a selected record. After clicking **Print**, the application displays the **Print** dialog where users can specify the printer, page range, number of copies, etc.; this dialog works like the one in Microsoft Office.

4.2.5 Erroneously Tracked Events

Once an event has been Tracked, it cannot be changed to Not Tracked. Use the following process when an event is erroneously Tracked.

1. Go to the **Tracked** tab, in any view (Main, Panel, Patient Record) and open a CMET worksheet for the event erroneously tracked. Click the **Add** button in the Findings area to access the **Findings** dialog.

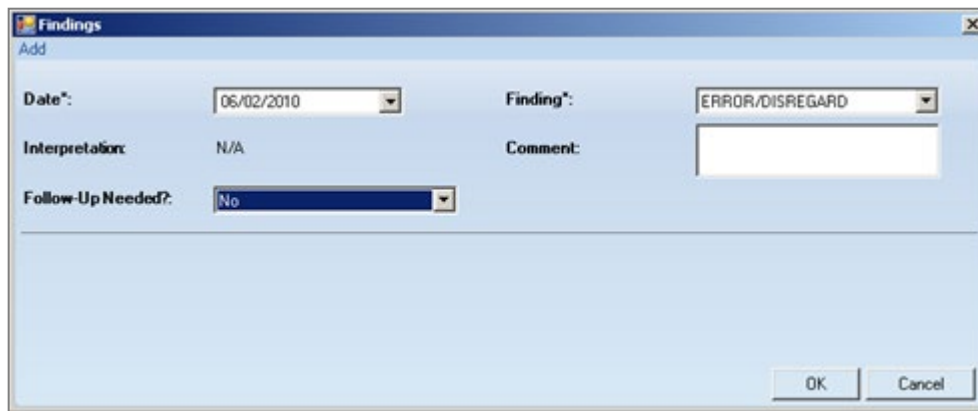


Figure 4-41: **Findings** dialog populated

Select the **ERROR/DISREGARD** option in the Findings field. Select the option **No** in the **Follow-Up Needed?** field. Use today's date for the **Date** field. Click **OK** to save and to close the dialog.

2. Go to the **Patient Notifications** area of the CMET Worksheet and click the **Add** button. The application displays the **Notifications** dialog.

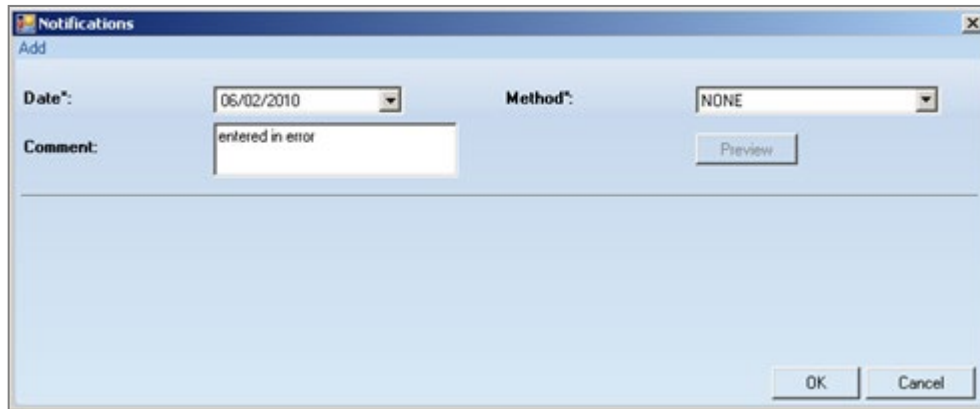


Figure 4-42: **Notifications** dialog populated

Use the **NONE** option for the **Method** field. It is recommended to add a comment in the **Comment** field (such as “entered in error”) and to use the current (today’s) date for the **Date** field. Click **OK** to save and to close the dialog.

3. The application will display the **Close Event** information message.

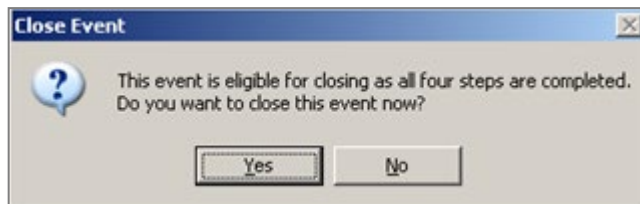


Figure 4-43: **Close Event** information message

Click **Yes** to close the message.

4. The application will display the **RPMS iCare – Reason for Closing** dialog.

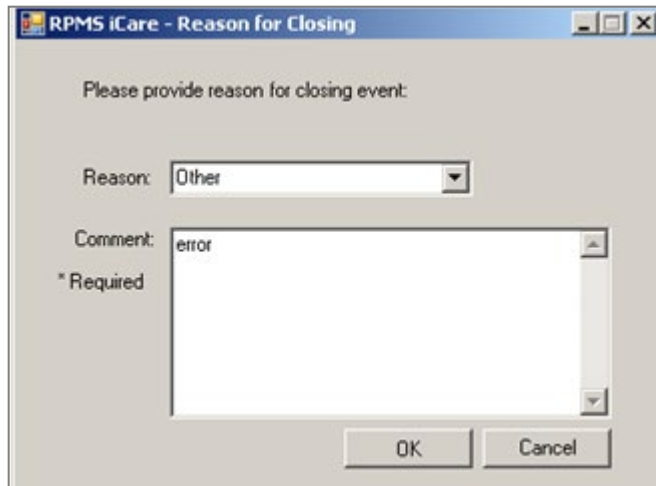


Figure 4-44: **RPMS iCare – Reason for Closing** dialog

Select the option **Other** for the **Reason** field. Type a comment in the **Comment** field. Click **OK** to save and to close the dialog.

5. The application will display the **Confirm save to RPMS information** message.



Figure 4-45: **Confirm save to RPMS** information message

Click **Yes** on the message to save the data to RPMS and close the message.

This process causes the particular event to have a State of Closed.

4.2.6 Using Create Button on Batch Processing Window

On the CMET Batch Mammogram Screening or CMET Batch Pap Smear window, click the **Create** button to access the **Add TIU Note – Batch Mode** dialog.

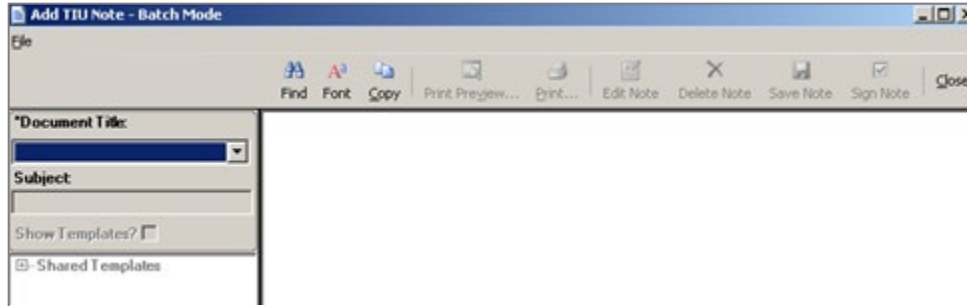


Figure 4-46: **Add TIU Note – Batch Mode** dialog

4.2.6.1 Fields

Both fields are required.

Document Title: Select an option from the list to establish the title of the TIU note.

Subject: Use this [Free Text](#) field to enter the subject of the TIU note.

At this point, the user can do one of the following: not use a template (see Section 4.2.7.1.1 for more information) or use a template (see Section 4.2.7.1.2 for more information).

4.2.6.1.1 Buttons

The **Find**, **Font**, **Copy**, **Print Preview**, and **Print** buttons on this dialog work like those on the [pop-up](#) window.

Adjust the Font size before saving the note. Using this process will save the note in an appropriate font size for the output (later).

Save Note: Click this button to save the current note.

Delete Note: Click this button to delete the current unsigned note. This button does not apply to signed notes.

Edit Note: Click this button to edit the text of an unsigned note.

Close: Click this button to close the **Add TIU Note – Batch Mode** dialog.

After clicking the **Close** button, the application closes the **Add TIU Note – Batch Mode** dialog.

Then the application displays the **Enter Electronic Signature** dialog.



Figure 4-47: **Enter Electronic Signature** dialog

Enter the electronic signature in the field and click **OK** (otherwise, click **Cancel**).

4.2.6.1.2 Printing the TIU Note

Click **OK** on the **Enter Electronic Signature** dialog, and the application displays the **Print TIU Notes** information message.

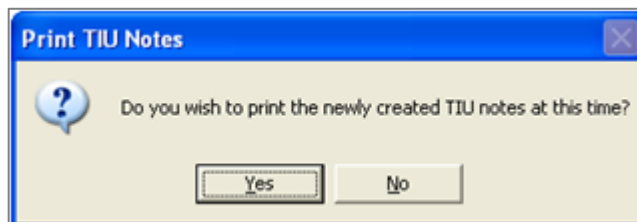


Figure 4-48: **Print TIU Notes** information message

Click **Yes** to print the TUI note. The application displays the **Print Preview** dialog. Print the TIU note from this dialog.

Click **No** to not print the TUI note. The application displays the **Print TIU Notes** information message. This presents a second opportunity to print the TUI note.

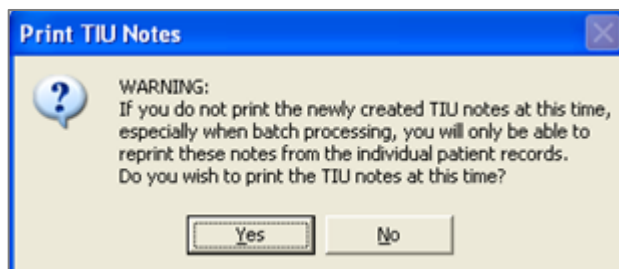


Figure 4-49: **Print TIU Notes** information message

Click **Yes** to print the TIU note at this time when batch processing. Otherwise, reprinting the note will only be available from the individual patient record.

Click **Yes**, and the application displays the **Print Preview** dialog. Print the TIU from this dialog.

4.2.7 Add TIU Note Dialog

The following information provides information about using the **Add TIU Note** dialog.

4.2.7.1 Using the Add a Note Button

Click the **Add Note** button to display the **Add a Note** dialog.

Click the **Create** button on the **Add a Note** dialog to display the **Add TIU Note** dialog.

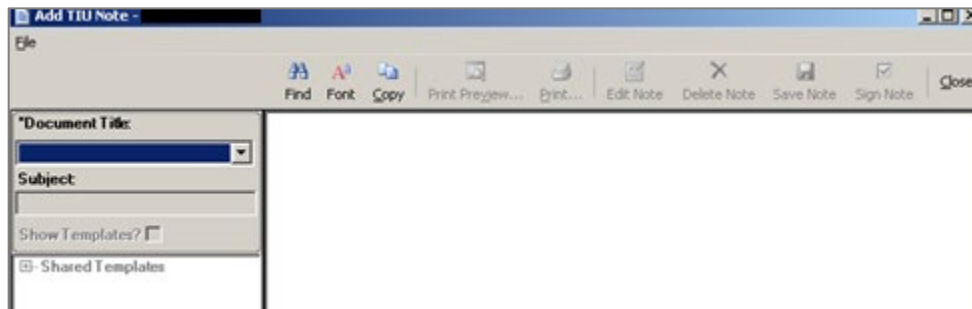


Figure 4-50: **Add TIU Note** dialog

Both fields are required.

Document Title: Select an option from the list to establish the title of the TIU note.

Subject: Use this [Free Text](#) field to enter the subject of the TIU note. This field becomes active after populating the **Document Title** field.

At this point, do one of the following: do not use a template or use a template.

4.2.7.1.1 Note with No Template

Populate the **Document Title** and **Subject** fields, then type the text of the TIU note in [Free Text](#) area on the right side of the dialog.

When the text is complete, the following buttons are active: **Find**, **Font**, **Copy**, **Save Note**, **Sign Note**, **Close**. See Section 4.2.7.1.3 for more information.

Below is an example of what happens after clicking the **Save Note** button.

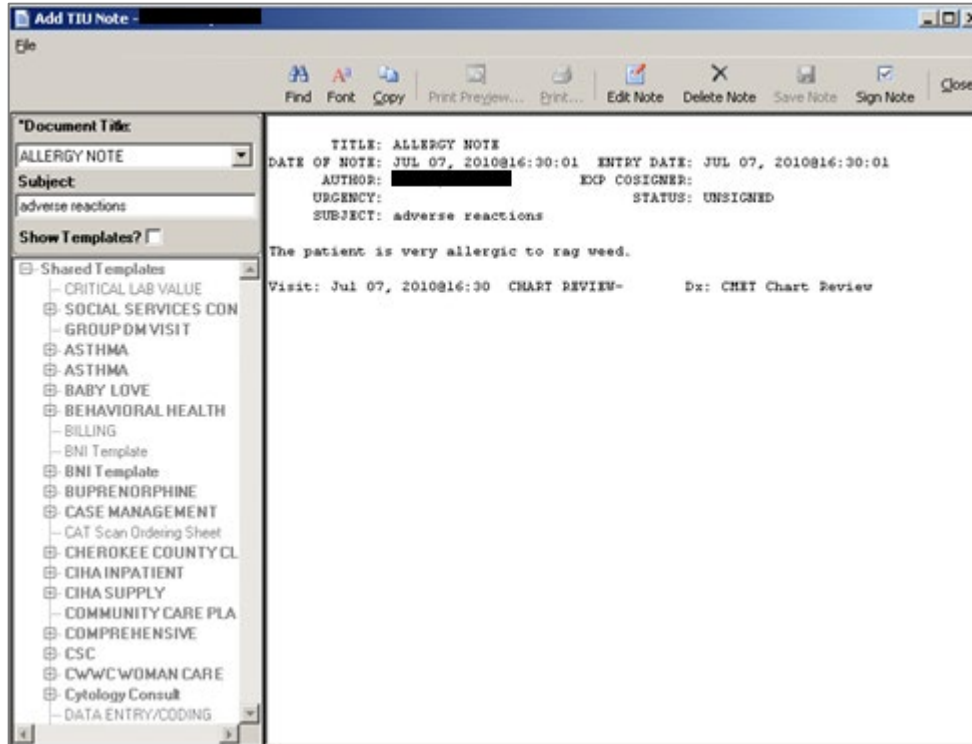


Figure 4-51: **Add TIU Note** dialog with note information

4.2.7.1.2 Note with Template

After populating the **Document Title** and **Subject** fields, check the **Show Template?** check box. This action shows the available templates. (Expand the **Shared Templates** option.) Find the appropriate template and double-click on its name to use it. The application will display the selected template.

Figure 4-52: **Template** dialog

Complete the template by using the buttons and check boxes on the template. What is used on the template determines the text of the TIU note.

Click the **Preview** button on the Template window to preview the note in its current state.

Figure 4-53: Preview of the TIU note

What displays on the **Template Preview** pop-up determines what will be in the text of the TIU note. Close (**File | Close**) the pop-up and return to the **Template** window.

After completing the Template window, click **OK** (otherwise, click **Cancel**), and return to the **Add TIU** dialog.

4.2.7.1.3 Buttons on Add TIU Note Dialog

Please note the following about the text of the TIU note:

- Line lengths should be less than 80 columns (characters), otherwise, the line spacing on the finished TIU note will not format correctly.
- The **Find**, **Font**, **Copy**, **Print Preview**, and **Print** buttons on this dialog work like those on the [pop-up](#) window.
- Adjust the font size before saving the TIU note, if needed.

Delete Note: Click this button to delete the current unsigned note. (This button does not apply to signed notes.)

Save Note: Click this button to save the current note. After clicking this button, the note is saved, and the **Delete Note** and **Edit Note** buttons become active.

Sign Note: Click this button to electronically sign the selected unsigned TIU note. After clicking the **Sign Note** button (or selecting **File | Sign Note**), the application displays the **Enter Electronic Signature** dialog.



Figure 4-54: **Enter Electronic Signature** dialog

Enter the electronic signature in the [Free Text](#) field and click **OK** (otherwise, click **Cancel**). After clicking **OK**, the user returns to the **Add TIU Note** dialog. The text of the note shows that the note has been electronically signed.

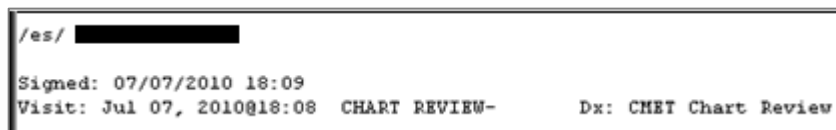


Figure 4-55: Electronic signature noted on text of TIU note

Edit Note: Click the **Edit Note** button to display the text of the note.



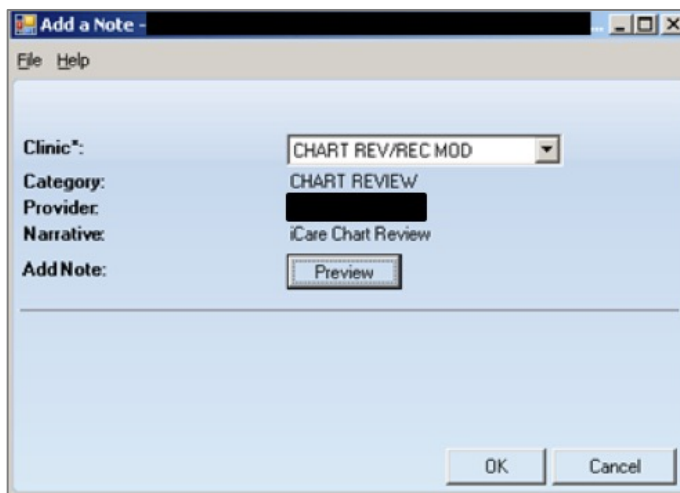
Figure 4-56: Example of note text

After editing the text of the note, click the **Save Note** button.

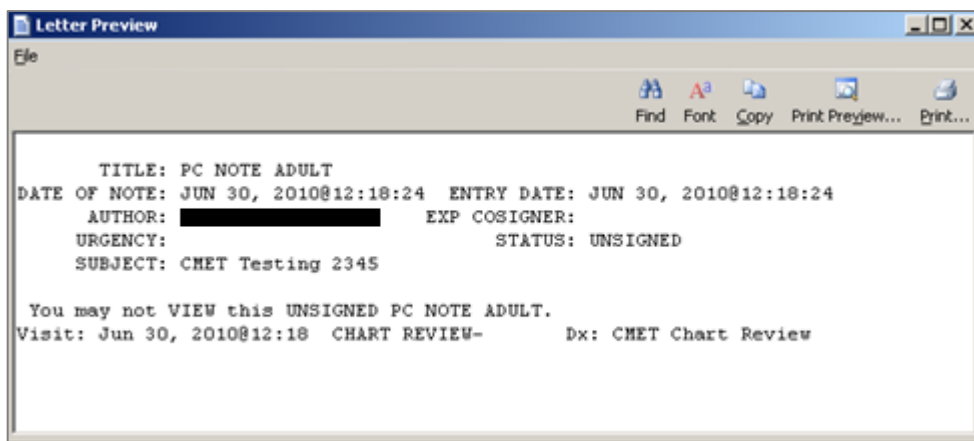
If the TIU note is signed, users cannot change the text; users can only view the text.

Close: Click this button to close the **Add TIU Note** (for patient) dialog. Click the **Close** button (or select **File | Close**) to close the dialog.

Return to the **Add a Note** dialog, with the **Preview** button next to the **Add Note** field.

Figure 4-57: **Add a Note** dialog with Preview button

Click the **Preview** button to display the note text.

Figure 4-58: **Letter Preview** pop-up

Close the [pop-up](#) to return to the **Add a Note** dialog (with the **Preview** button on it).

After the **Add a Note** dialog is complete, click **OK** (otherwise, click **Cancel**).

After clicking **OK**, the application displays the **Enter Electronic Signature** dialog.



Figure 4-59: **Enter Electronic Signature** dialog

Enter the electronic signature in the [Free Text](#) field. After completing the dialog, click **OK** (otherwise, click **Cancel**).

- Entering an invalid electronic signature and clicking **OK** prompts the application to display the Invalid Attempt information message: “Invalid electronic signature. Try again?” Click **Retry** to return to the **Enter Electronic Signature** dialog. Click **Cancel**, and the application displays the message: “Unable to save with a signed note.” Click **OK** to return to the **Add a Note** dialog.
- Click **Cancel**, and the application displays the message: “Unable to save with a signed note.” Click **OK** to dismiss the message.
- If entering a valid electronic signature and clicking **OK**, the application displays the information message: “This data will be saved to the RPMS server. Do you want to continue?” Click **Yes** to save and continue. Click **No** to discard the note and exit the dialog.

4.3 CMET Panel View

The **Care Management Event Tracking (CMET)** tab on the Panel View window provides the same view as CMET Main View, including information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs by only the patients in this selected panel.

The functionality is the same as Main View. Review Section 3.0 for more detail on the CMET functionality.

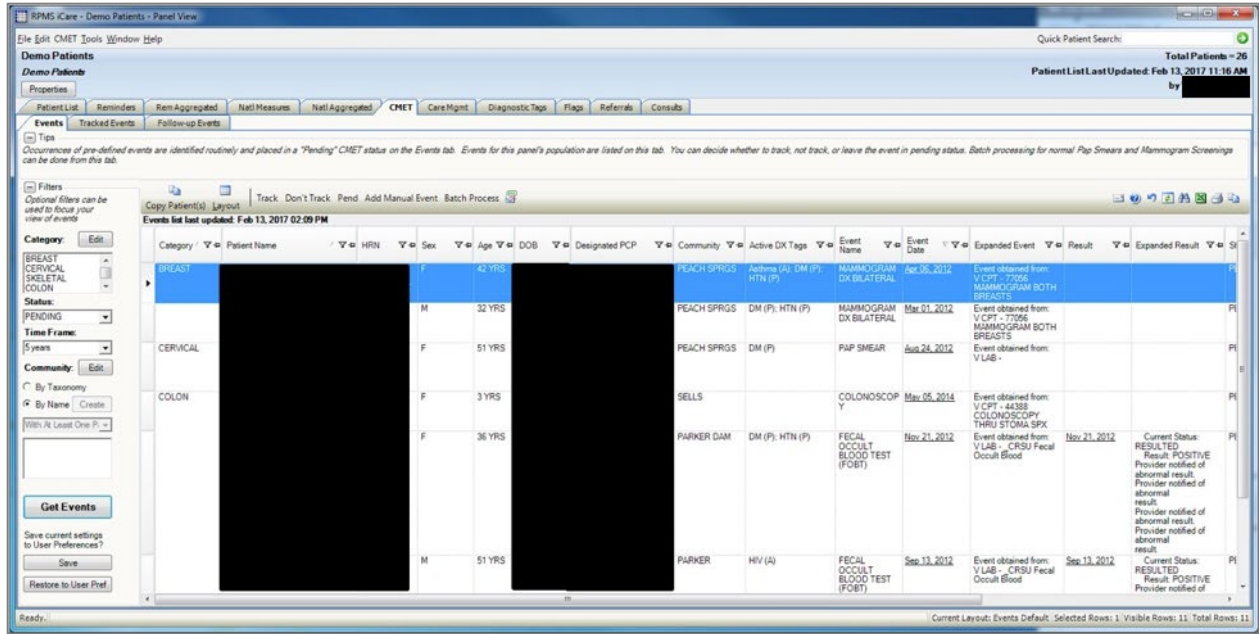


Figure 4-60: Events sub-tab

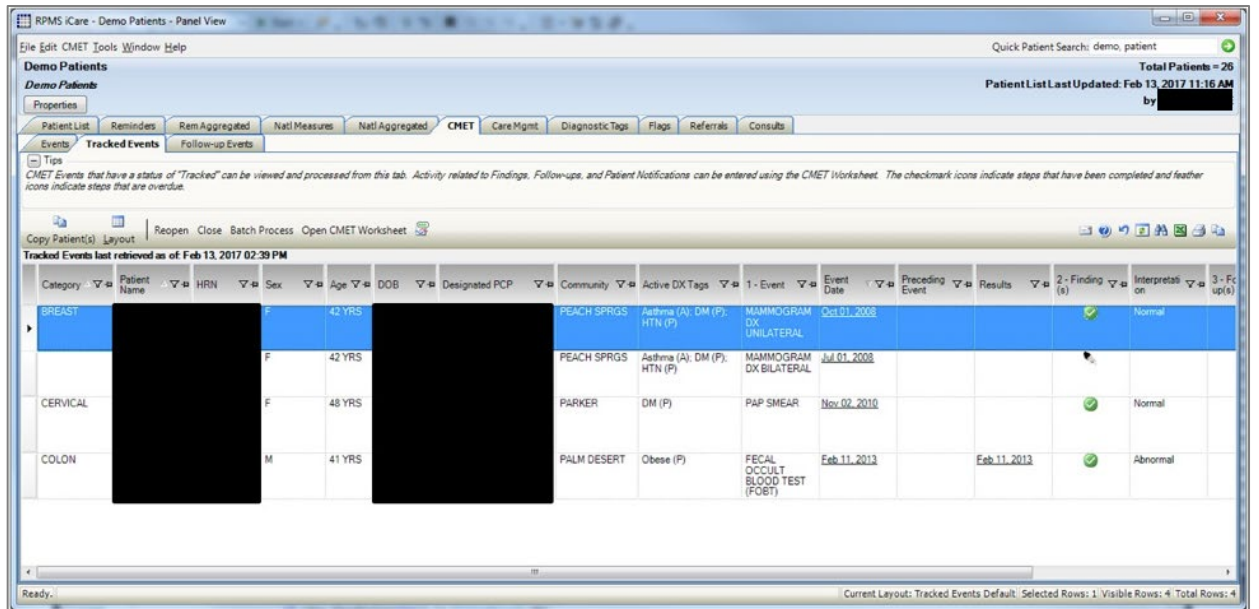


Figure 4-61: Tracked Events sub-tab

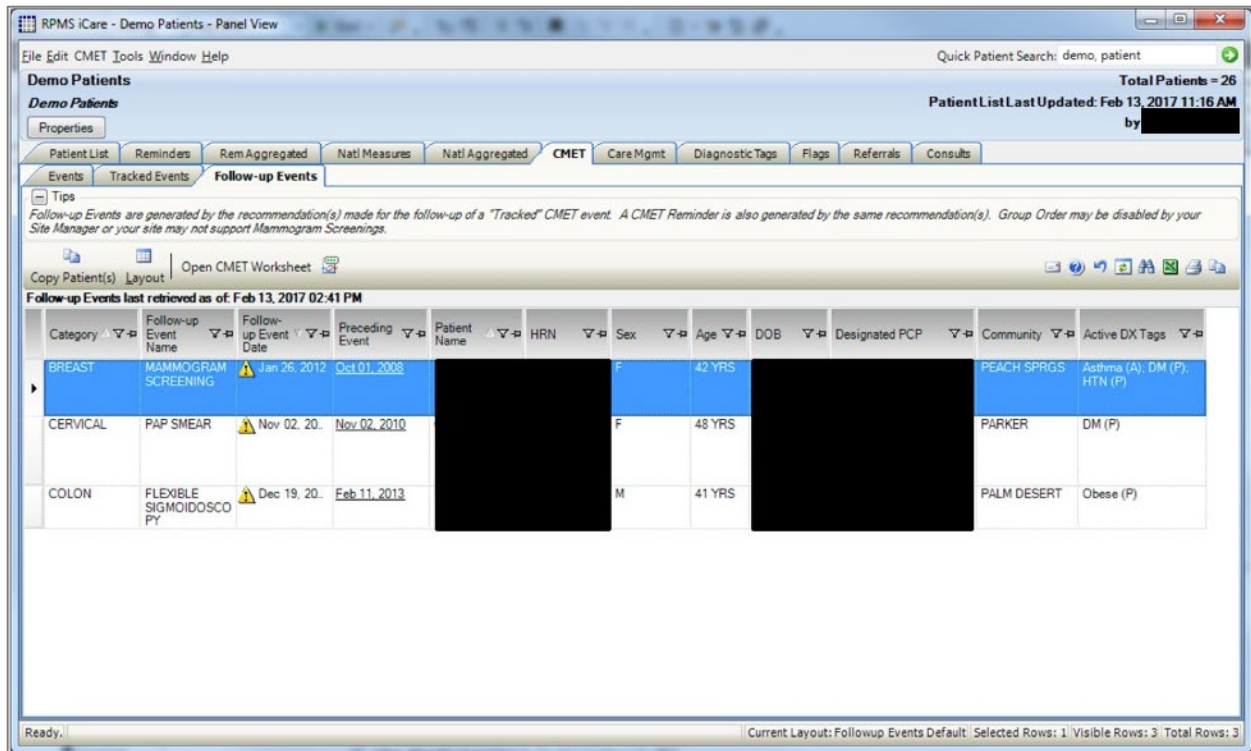


Figure 4-62: **Follow-up Events** sub-tab

4.4 CMET Patient View

The CMET Patient View is similar to the Main View and the Panel View, with information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs by the selected patient. In addition, Patient View has a fourth sub-tab called **Past Events**.

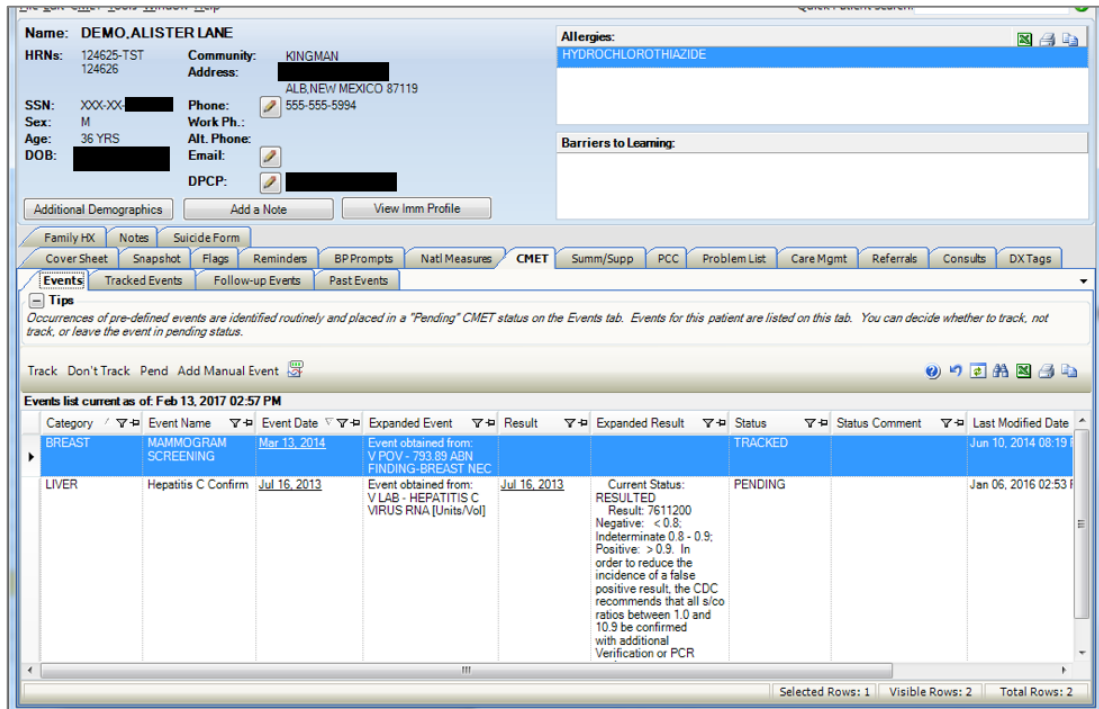


Figure 4-63: CMET Patient View Events sub-tab

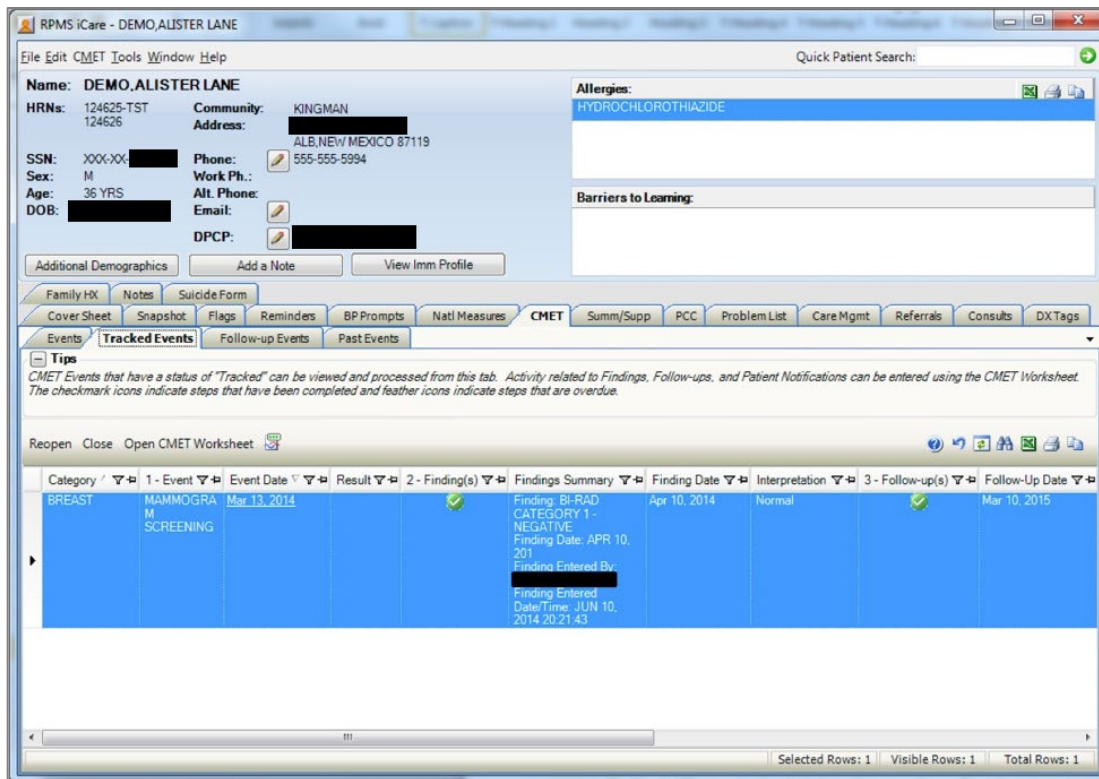


Figure 4-64: CMET Patient View Tracked Events sub-tab

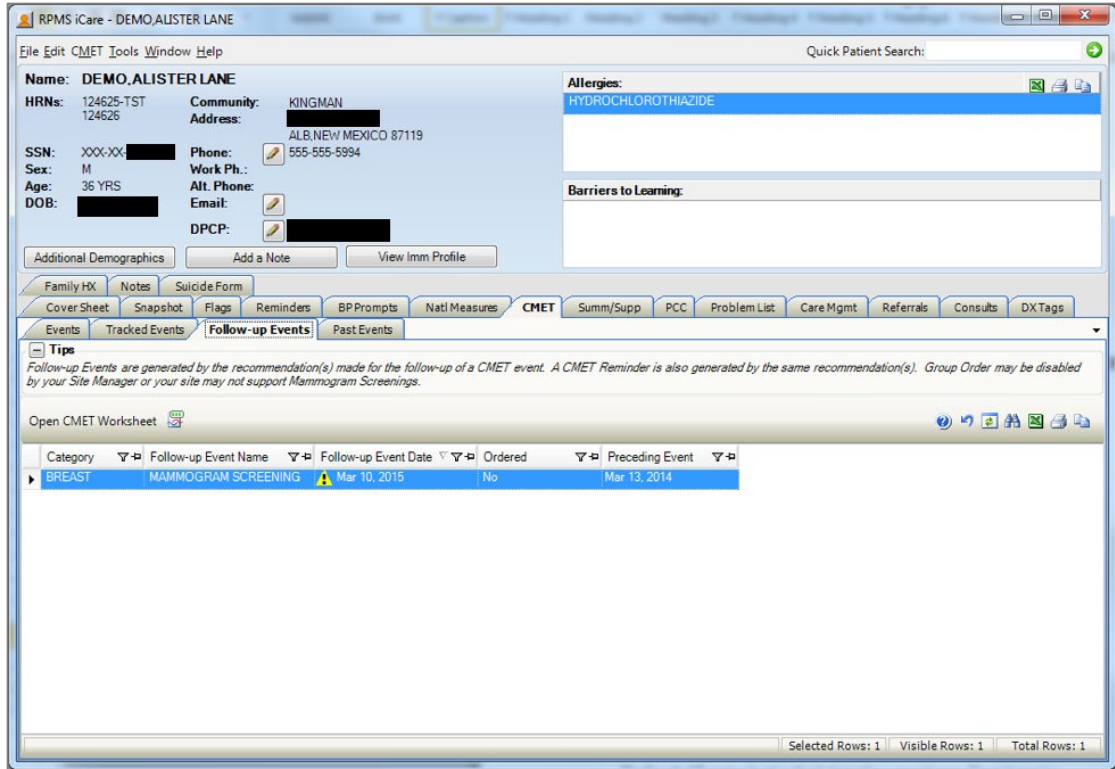


Figure 4-65: CMET Patient View Follow-up Events sub-tab

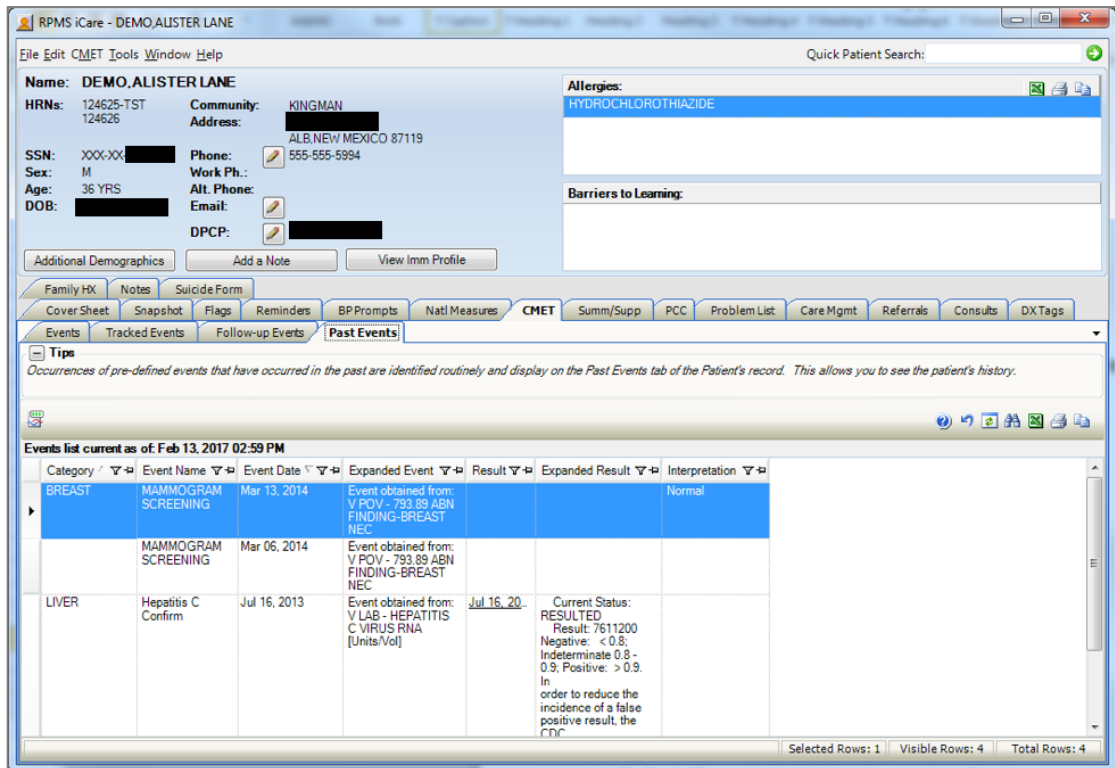


Figure 4-66: CMET Patient View Past Events sub-tab

Past Events are all the CMET Events that have been data-mined for the selected patient. It can be used to review historical information on this patient.

Table 4-4 provides information about the columns on the **Past Events** sub-tab.

Table 4-4: **Past Events** sub-tab column names and meanings.

Column Name	Meaning
Category	The name of the category for the follow-up event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
Event Name	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Event Date	The date associated with the event.
Result	The date of the result of the event. This cell also has hover help, which identifies where the result comes from such as V Radiology, V Lab, or Women's Health packages.
Interpretation	The interpretation of the selection in the Result field. There is hover help for this field, e.g., CMET, that refers to where the interpretation was obtained. The interpretation will be from either Women's Health or from a tracked CMET Event where the Finding has been entered. All CMET Findings have an interpretation.

4.5 Standard Menus on the CMET Tab

4.5.1 File Menu

The File menu has the following options:

CMET: This shows various options depending on the current sub-tab.

Change RPMS Server/Login: This [option](#) allows users to change access and verify codes to the iCare application on the iCare Login dialog.

Change RPMS Division: This option allows users to change the RPMS Division on the **Select Division** dialog. This option applies to a site that uses more than one RPMS database.

Recent Panels: This sub-menu displays recent panels. Select one to view the patients in the selected panel in a new window. The list includes the last five panels viewed.

Page Setup: This option allows users to set Margin, Paper, Layout characteristics (such as landscape or portrait orientation), and which Printer to use. These settings are used when using the Print option.

Print Preview: This option displays the [Print Preview](#) dialog.

Print: This option sends the selected rows to the printer using the settings in Page Setup. Note that only the selected tab will be printed.

Background Jobs: This option displays the **Background Jobs** pop-up. This pop-up displays, for example, the start and end dates for the monthly and weekly background jobs.

Exit iCare: This option exits the iCare application. Users are prompted to save any changed panels if necessary.

Lock iCare: This option allows users to lock the iCare application. Resume the application by entering your verify code on the **iCare Locked By** dialog and clicking **Resume**.

4.5.2 Tools Menu

The options on the **Tools** menu are the same as those on the Tools menu for the Panel List window.

Quick Patient Search: Search for a patient name. This is the same as pressing the F8 key on the keyboard.

The **Mail Merge, Reset View, Search, Refresh, Excel Export, Print, and Copy Rows to Clipboard** options function like the buttons on the right side of the window.

Manage Templates: This [option](#) opens the **Template Management** dialog where you manage your templates and public templates.

User Preferences: This option opens the [User Preferences](#) window.

View iCare Notifications: This option opens the **iCare Notifications** pop-up.

iCare Package Manager: This [option](#) is active for those users with Package Manager security key.

iCare Site Parameters: This [option](#) allows users to set site parameters for Employers, Pregnancy, Inactivity Time Out, CMET Site Parameters, IPC Site Parameters, Divisions, DM Audit.

Taxonomy Maintenance: This option is used by those users who can maintain taxonomies. Also use this option to view the taxonomy elements. This option has the following two features: [View/edit Taxonomies](#) and [Taxonomy User Access](#).

Web Links: This option provides links to Web sites for related clinical guidelines.

4.5.3 View Menu

The **View** menu has one option:

Split View: When this option is selected, the current view is the split view. Switch back to the CMET tab by removing the checkmark; this is a temporary setting. After exiting and reopening iCare, the settings established in [User Preferences](#) are used for the default view.

4.6 Free Text Fields

Free text fields are fields that users can type information into. These types of fields do not have a list from which to select an option to populate it.

An example of the Free Text field is the **Panel Name** field (when creating/editing a panel definition).

There is a context menu to aid in editing the text.

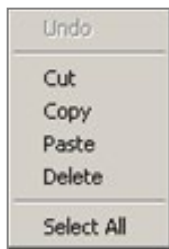


Figure 4-67: Context menu to aid in editing text

These options operate just like those in any Windows application.

Undo: Removes the last edit action.

Cut: Removes the selected text from its current position and places it on the Windows clipboard.

Copy: Copies the selected text and places it on the Windows clipboard (the text is not removed).

Paste: Copies the contents of the Windows clipboard and places it in the field at the current cursor position.

Delete: Removes the selected text from its current position.

Select All: Highlights all of the text in the current field.

4.7 Print Preview

The **Print Preview** window contains several features for reviewing and printing the current document.

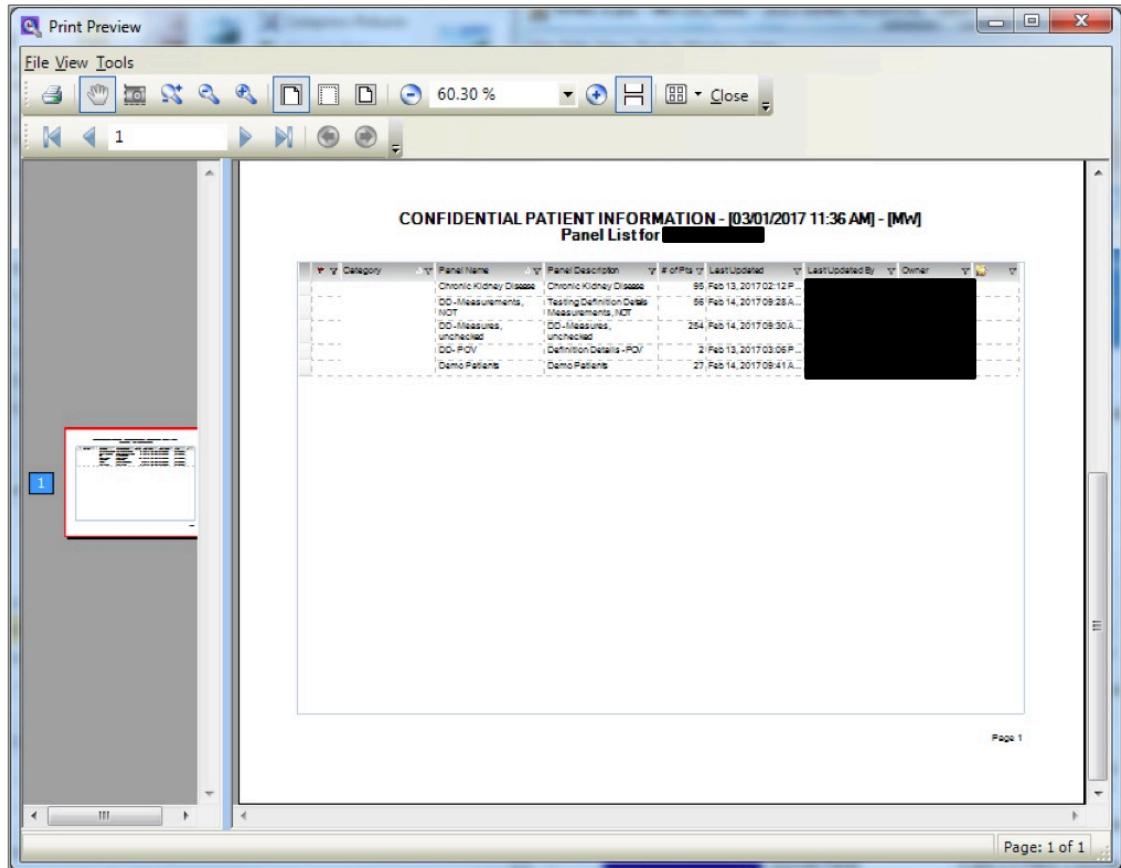















Figure 4-68: **Print Preview** dialog

The **Print Preview** window contains two panels: The left panel displays the pages in the document, and the right panel displays a larger version of the page selected in the left panel.

Table 4-5 provides information on the various buttons on the **Print Preview** window.

Table 4-5: **Print Preview** dialog buttons and descriptions

Button	Description
	Prints the document. This function is also available by selecting Print from the File menu.
	Changes the display of the selected page in the right panel. Navigate the hand tool to change the page selection (red box) in the left panel. This function is also available by selecting Hand Tool from the Tools menu.

Button	Description
	Click for a screen capture of a specified rectangular area. The screen capture copies to the Windows clipboard. Paste the copy into a particular field or another application like Microsoft Word. This function is also available by selecting Snapshot Tools from the Tools menu.
	Specify the zoom magnification. Click the button and move to the area to magnify or minimize. Right-click on the area and select the zoom magnification option from the context menu. This function is also available by selecting Dynamic Zoom Tool from the Tools menu.
	Zooms out and decreases the image view size. This function is also available by selecting Zoom Out from the View menu.
	Zooms in and enlarges the image view. This function is also available by selecting Zoom In from the View menu.
	Displays the image in the right panel at its maximum page width (usually enlarges the image). This function is also available by selecting Page Width from the View menu.
	Displays the image in the right panel with page margins hidden. This function is also available by selecting Margin Width from the View menu.
	Displays the page with page margins in the right panel. This function is also available by selecting Whole Page from the View menu.
	Zooms out of the image in the right panel. Also available by selecting Zoom Out from the View menu.
	Zooms into the image in the right panel. This function is also available by selecting Zoom In from the View menu.
	Displays all pages in the right panel. This function is also available by selecting Continuous from the View menu.
	Click to specify the page layout. This function is also available by selecting Page Setup from the File menu.

Move through the pages in the document by using the arrow buttons on the second line in the toolbar.



Figure 4-69: Buttons to navigate through document pages

The same options are available by selecting **View | Go To** (and on the context menu for the right panel).

Use the **Zoom** field (or select **Zoom** from the **View** menu) to specify the zoom magnification for the right panel by selecting from the list.

Click the **Close** button to close the **Print Preview** dialog or select **File | Exit**.

Select **File | Page Setup** to access the **Page Setup** dialog.

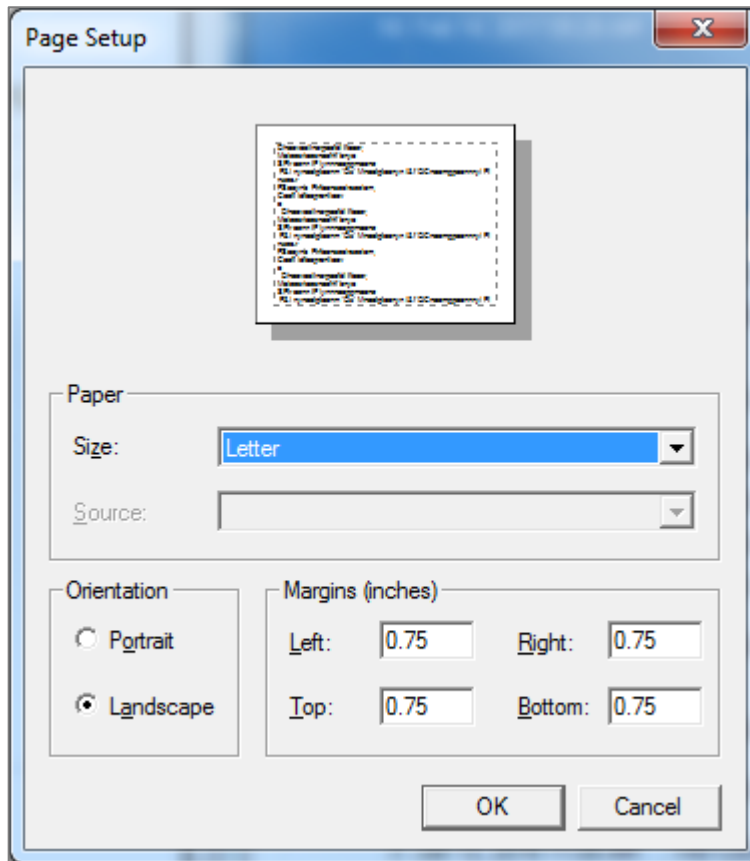


Figure 4-70: **Page Setup** dialog

Specify the paper size and source in the **Paper** group box.

Specify the page orientation in the **Orientation** group box.

Specify the document margins in the **Margins (inches)** group box.

Click **Printer** to access the **Printer** dialog and select the printer to print the document.

After the **Page Setup** dialog is complete, click **OK** to save the page setup options. (Otherwise, click **Cancel**.)

4.8 iCare Package Manager Functions

Users with the Package Manager security key can access Manager functions by selecting **Tools | iCare Package Manager** on the iCare main window.



Figure 4-71: iCare Package Manager functions

4.8.1 iCare User Access Management

The iCare User Access Management option accesses **iCare User Access Management** dialog.

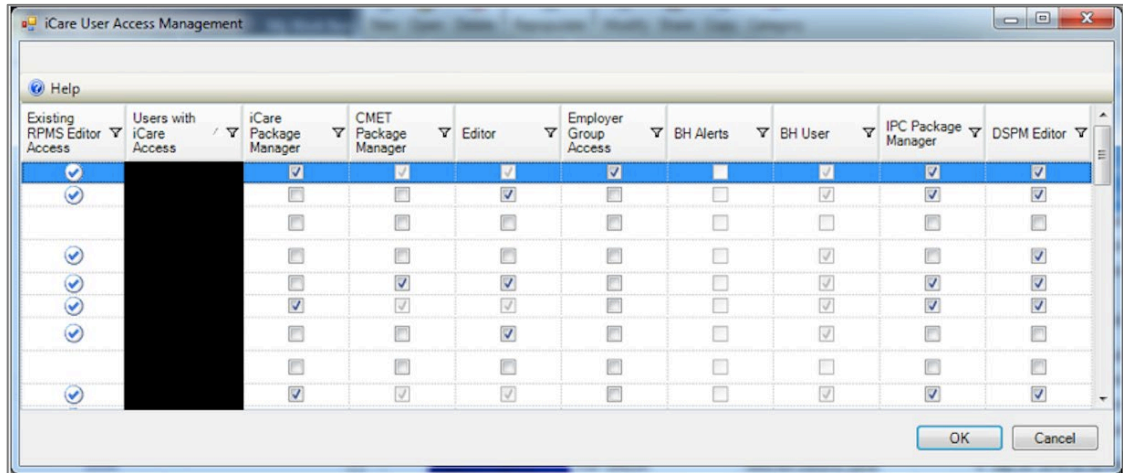


Figure 4-72: iCare User Access Management dialog

Users with appropriate permissions can assign roles to a particular user. Scroll to the name on the **iCare User Access Maintenance** dialog and select the appropriate check boxes for the roles. To remove an assigned role, deselect the particular check box.

When this dialog is complete, click **OK** to save changes. (Otherwise, click **Cancel**.)

Note: The BH User column cannot be changed.

Each column heading has hover help.

Some check boxes are checked, and the background is dark if the user has iCare Package Manager access that supersedes both CMET and Editor permissions. The Employer and Behavioral Health (BH) permissions function differently due to the sensitive nature of the patients involved.

4.8.1.1 Existing RPMS Editor Access

The users displayed on this list (those with the iCare user icon [👤] in the first column) have Editor or Manager level key(s) to at least one of the following case management applications:

- Case Management System (ACM)

- Diabetes Management System (BDM)
- HIV Management System (BKM)
- Immunization (BI)
- Patient Chart Problem List
- Women's Health (BW)

4.8.1.2 Help Menu

Click the **Help** menu to view the following information:

The users displayed on this list have basic access to the iCare application by the Site (IT) Manager. You cannot give Editor or Package Manager access to iCare to a user who does not have basic access. See your Site Manager to require basic iCare access for other users.

This message applies to the **User with iCare Access** column. Click **OK** to dismiss the message.

4.8.1.3 Users with iCare Access

This column is a list of RPMS users who have been given access to the iCare application by the Site (IT) Manager.

4.8.1.4 iCare Package Manager

The iCare Package Manager has all read/write access as defined for other user levels. This person can do the following:

- Assign all other access roles in iCare: iCare Package Managers; CMET Package Managers, Editors, and Taxonomy Editors.
- Access Patient Information associated with Community Alerts.
- Has all read/write access as defined for other user levels.
- Reassign existing iCare panels to iCare users.

Note: Taxonomy Editor Access Management is assigned through the **Taxonomy Maintenance/ Taxonomy User Access** window from the Tools menu.

The iCare Package Manager has the highest level of permissions; hence, the iCare Package Manager will have access to all items accessible by the CMET Package Manager.

The iCare Package Manager does everything an editor does and also has the ability to access the list of patients who have triggered the Community Alerts. This person also assigns Editor access to other users. In addition, this person can assign the CMET Package Manager role.

4.8.1.5 CMET Package Manager

The CMET Package Manager has the ability to establish the CMET site parameters related to Tickler Timeframes and Batch Processing. CMET Package Managers have all read/write access as defined for other user levels.

4.8.1.6 Editors

Editors in iCare have read/write access to:

- PCC Historical Data Entry
- Care Management data
- Family History and Reproductive Factors (Snapshot)
- Designated Specialty Provider Management system (DSPM)
- Problem List
- CMET Worksheet

The Editor role grants permission to edit the care management function (e.g., HMS Care Management) and allows Historical Data entry.

4.8.1.7 Employer Group Access

Employer Group Access gives the user the ability to define a panel based on the **Employer** option in Panel Definition. They will also have visibility for the **Employee Health** option on the **Panel View: Care Mgmt** tab. Both the definition and **Care Mgmt** feature will not be visible to users who do not have permission.

4.8.1.8 BH Alerts

Exclude non-BH alerts.


4.8.1.9 BH User

This is a user with existing BH access. This cannot be edited from iCare screens.

4.8.1.10 IPC Package Manager

The IPC Package Manager has the ability to establish site parameters related to the background job and microsystem definition for IPC tabs in iCare.

4.8.1.11 DSPM Editor

The DSPM (Designated Specialty Provider Management) Editor gives a user permission to use the **Update DPCP** button () on panels.

4.8.2 Reassign Panels

The **Reassign Panels** option displays the **Reassign Panels** dialog.

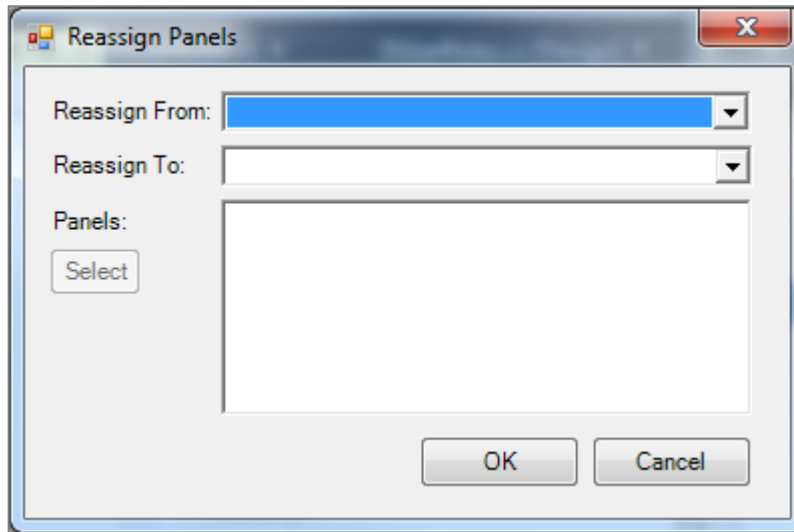


Figure 4-73: **Reassign Panels** dialog

This dialog allows the iCare Package Manager to reassign panels from one user to another user.

Reassign From: Select the user from who the panels are to be reassigned from the list.

Reassign To: Select the user to whom the panels are to be reassigned from the list.

Populating the first two fields activates the **Select** button. Click **Select** to access the **Add/Remove Panels** dialog.

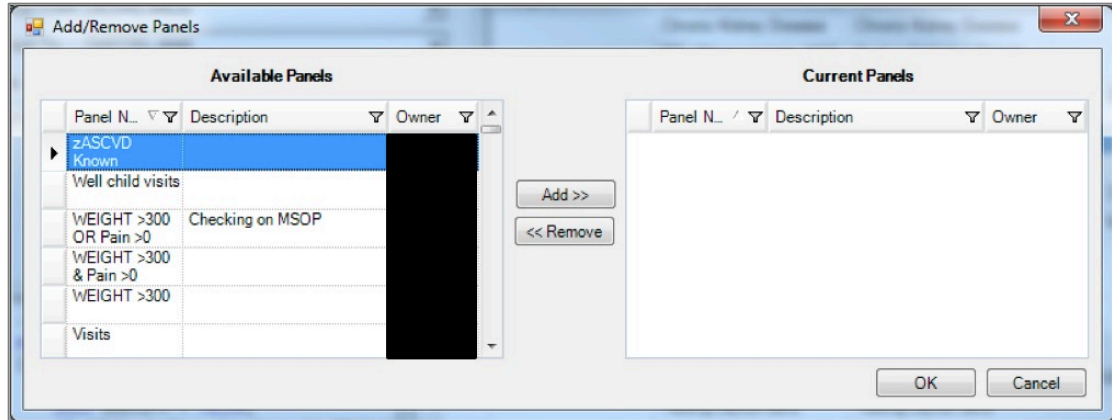


Figure 4-74: **Add/Remove Panels** dialog

After the **Add/Remove** dialog is complete, click **OK**. The panels listed in the **Current Panels** group box will populate the **Panels** field on the **Reassign** dialog. (Otherwise, click **Cancel**).

After the **Reassign Panels** dialog is complete, click **OK**, and the reassigned panels of the **Reassign From** user are removed from that person's panel view. The reassigned panels will display in the **Reassign To** user panel view. (Otherwise, click **Cancel**.)

4.9 iCare Taxonomy View/Edit

The iCare Taxonomy Editor holds the security key (BQIZTXED) allowing that person to read/edit iCare taxonomies.

Access the **iCare Taxonomy View/Edit** dialog by selecting **Tools | Taxonomy Maintenance | View/Edit Taxonomy Entries** on the main iCare **Tools** menu.

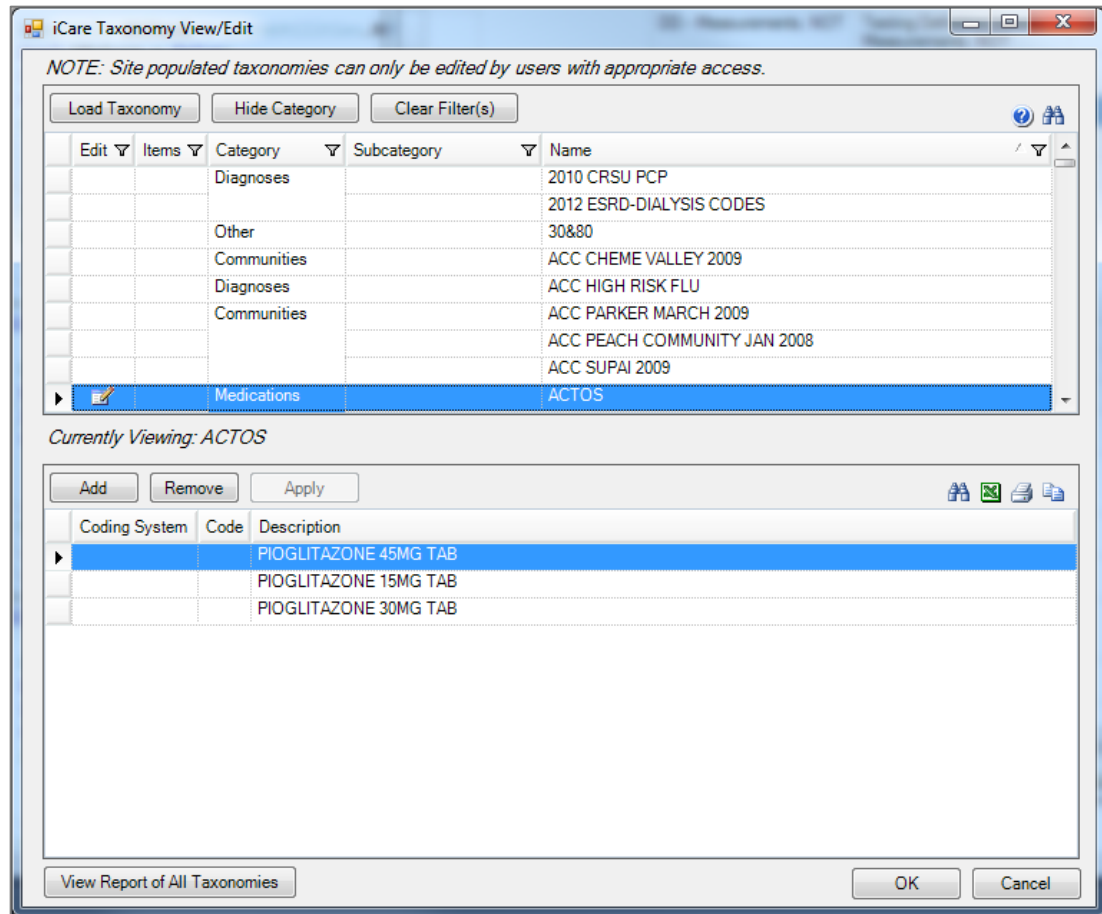


Figure 4-75: iCare Taxonomy View/Edit dialog

Note: Only users with the appropriate security key can view the information on the dialog. The following information message displays: “You do not currently have access rights to edit taxonomies.” Users requiring access need to have the iCare Taxonomy Editor security key (BQIZTXED) added to their RPMS user account.

When first accessing this view/edit dialog, all parts of the tree structure will be collapsed. Expand the tree parts to find the desired taxonomy.

In general, select the taxonomy from the list in the left group box. This causes the **Add** and **Remove** buttons to display in the right group box of the dialog.

Please note that not all taxonomies can be edited. iCare will display a message on the view/edit dialog for these taxonomies. Site-populated taxonomies can only be edited by users with appropriate access.

Use the **Apply** button when adding more than one taxonomy value to the **iCare Taxonomy View/Edit** dialog.

4.9.1 Add Taxonomy Values

Click the **Add** button to create values for a selected item in the left group box. The application displays the **Select Taxonomy Item** dialog.

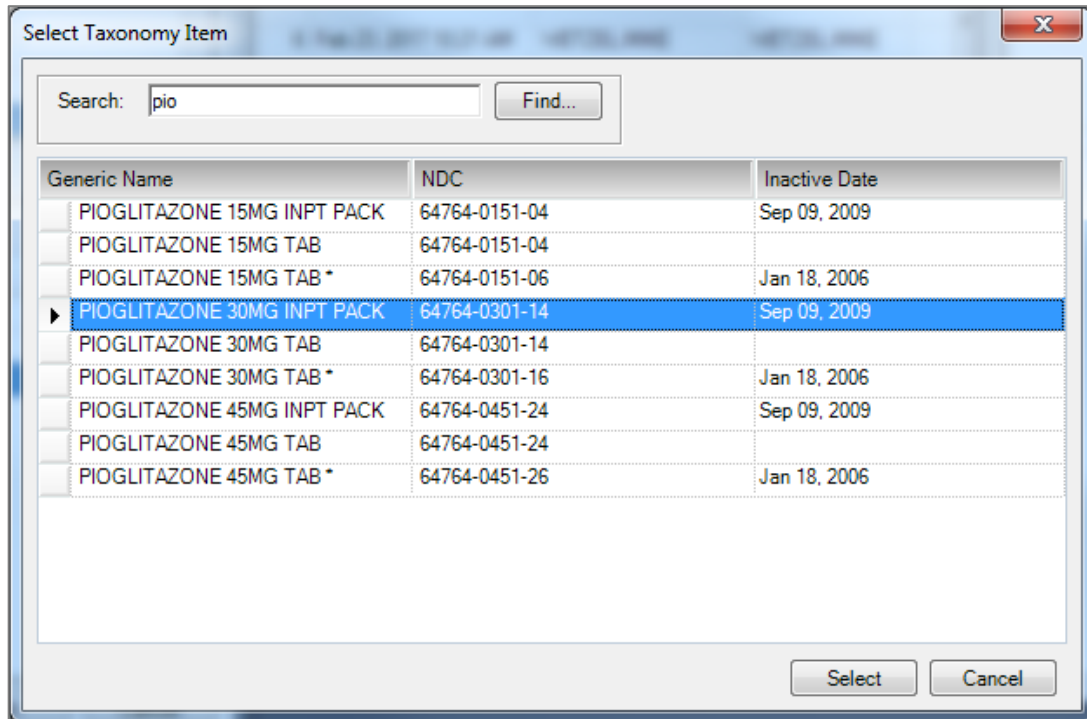


Figure 4-76: **Select Taxonomy Item** dialog

Use the **Search** field to search for a taxonomy item. Highlight the item to add and click **Select**. The application checks to find an existing record.

- If the item already exists, a warning message displays. Click **OK** to dismiss the message and return to the **iCare Taxonomy View/Edit** dialog.
- If the does not exist in the system, it appends the selected item to the bottom of the list.

If there are no more taxonomy values to add, click **Apply** to save changes. Attempting to move to another taxonomy or another part of the iCare application before clicking **Apply** will result in the **Taxonomy changes?** information message. The message will ask whether to apply the changes. Click **Yes** to apply the changes (otherwise, click **No**).

If needed, repeat adding items to various taxonomies. When finished using the **iCare Taxonomy View/Edit** dialog, click **OK** to save (otherwise, click **Cancel**).

4.9.2 Remove Taxonomy Values

To remove one or more items from the list, select the item(s) and click **Remove**. The **Confirm taxonomy item remove message** displays. Click **Yes** to remove the items (otherwise, click **No**) and remain on the **iCare Taxonomy View/Edit** dialog.

4.9.3 View Report of All Taxonomies Button

Click the **View Report of All Taxonomies** button to display the **Taxonomy Report** pop-up.

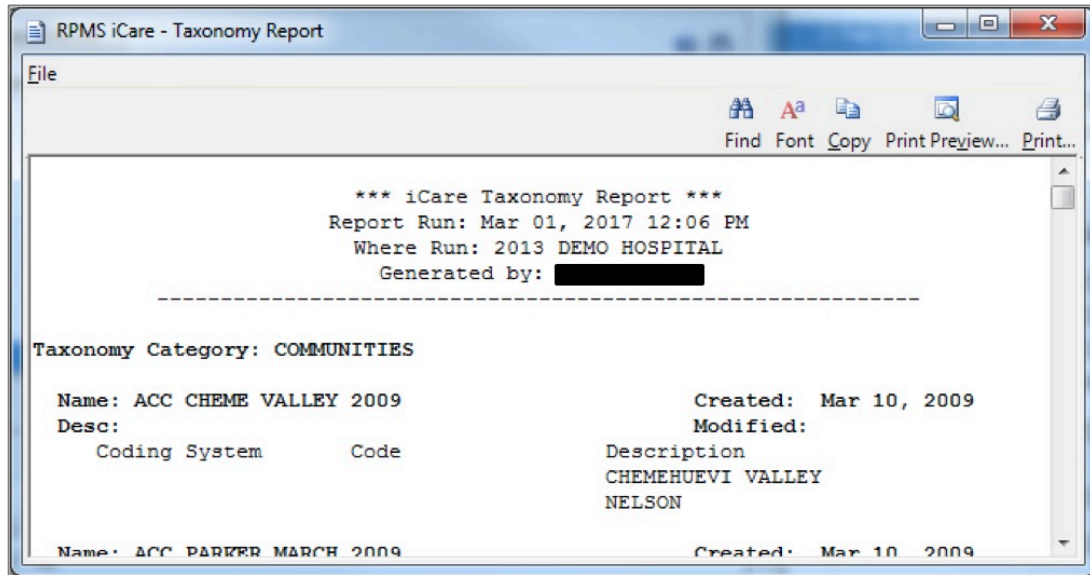


Figure 4-77: **Taxonomy Report** pop-up

This pop-up provides information about various Taxonomy Categories (listed in alphabetical order).

See Section 4.5.1 for information about the **File** menu and buttons on the pop-up.

4.10 Pop-up Functionality

Several functions in iCare result in displaying a pop-up. For example, double-clicking on any row in the **Recent Visits** group box on the Cover Sheet of the **Patient Record** window results in the display of a pop-up.

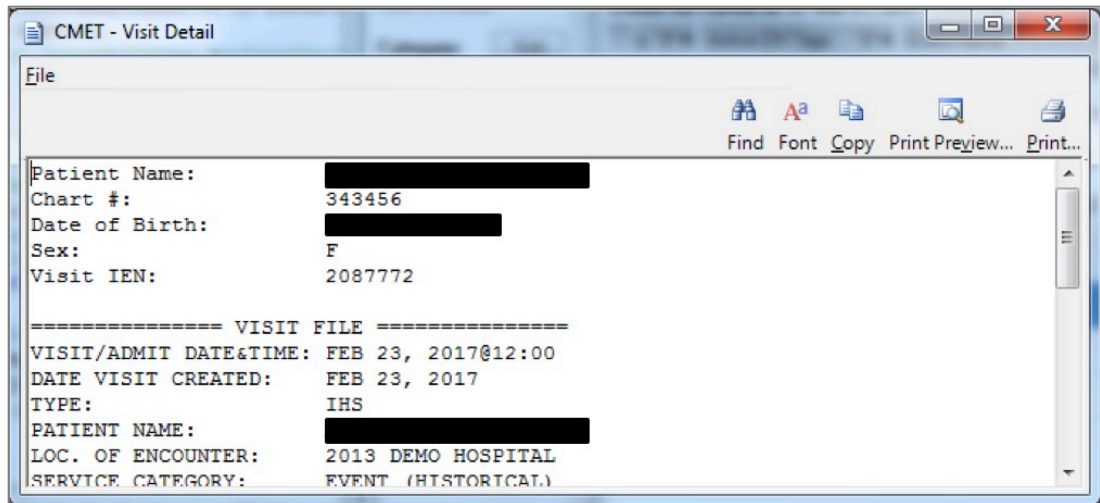


Figure 4-78: Visit Detail pop-up

Take the following actions on this pop-up:

- Navigate through the information by using the scroll bar.
- Click the **Find** (Find) button to access a search tool to find data in the current window. This button works like the **Search** button.
- Click the **Font** (Font) button to display the **Font** dialog.

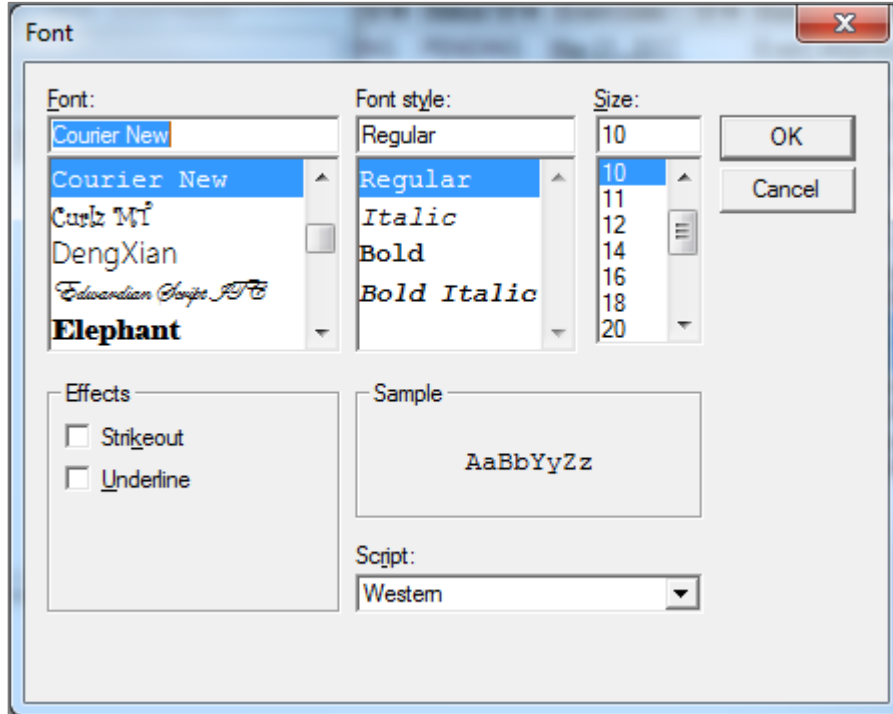





Figure 4-79: Font dialog

Use this dialog to change the Font name, style, and size (applies to all of the text). Additional effects like Strikeout and Underline are also available on this form and perform like those effects in Microsoft Word.

Change the Script option to see the text displayed in another language, and if that language pack is installed on the computer. If the language pack is not installed, the display will not change by selecting another script.

Click **OK** to apply changes to the text in the current pop-up. These changes are only effective for the current view of the pop-up. (Otherwise, click **Cancel**.)

- Click the **Copy** () button to copy the selected text to the Windows clipboard.
- Click the **Print Preview** () button to view the [Print Preview dialog](#). Print the pop-up contents from this dialog.
- Click the **Print** () button to display a print dialog to specify the printer, the page range, and number of copies.

The **File** menu contains the print actions (like the **Print Preview** and **Print** buttons), the **Page Setup** function, the **Find** and **Copy** functions, as well as a **Close** function, which dismisses the pop-up.

4.11 Taxonomy User Access

Editing site populated taxonomies can affect many existing processes in RPMS. For this reason, **Taxonomy Edit** access is carefully assigned to a limited number of users and only after discussion with the CRS (GPRA) coordinator.

Select **Tools | Taxonomy Maintenance | Taxonomy User Access** to access the **iCare Taxonomy User Access Management** dialog.

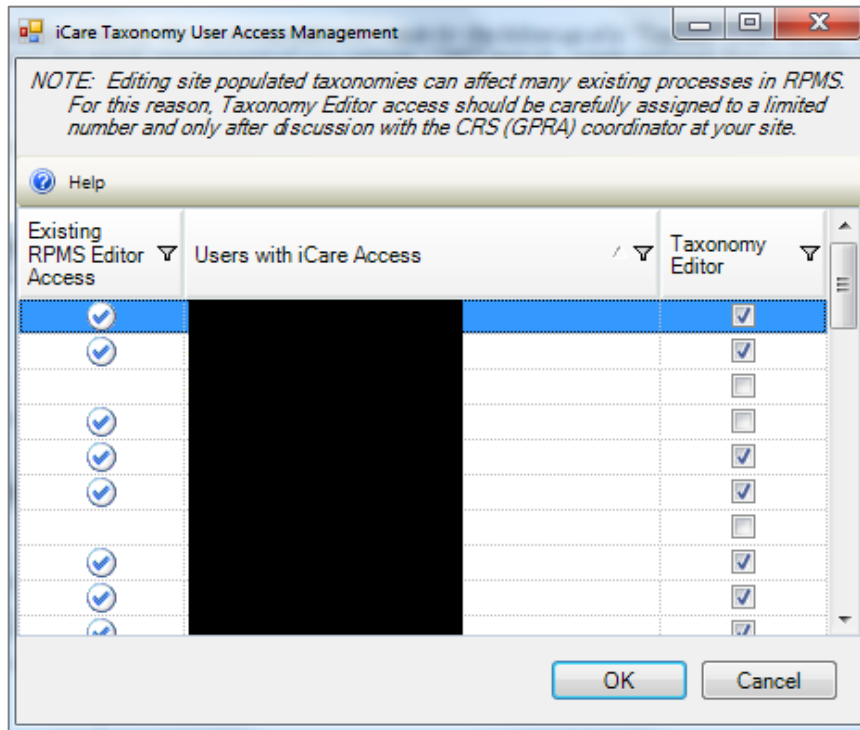


Figure 4-80: **iCare Taxonomy User Access Management** for Taxonomy Editor

Each of the column headings has hover help.

4.11.1 Existing RPMS Editor Access

The users with the iCare user icon (👤) in the first column are RPMS users with existing Manager level keys to at least one of the following applications: CRS (BGP), Diabetes Management (BDM), HIV Management System (BKM), and/or Women's Health (BW).

4.11.2 Users with iCare Access

This column is a list of RPMS users who have been given access to the iCare application by the Site (IT) Manager.

4.11.3 Taxonomy Editor

Users with a checkmark are taxonomy editors who can add and delete members from any Site Populated Taxonomies related to either laboratory tests or medications.

4.11.4 Help Menu

The following information displays after clicking the **Help** menu:

The users displayed on this list have been given basic access to the iCare application by your Site (IT) Manager. You cannot give Editor or Package Manager access to iCare to a user who doesn't have basic access. See your Site Manager to acquire basic iCare access for other users.

4.12 Change RPMS Server/Login

The **Change RPMS Server/Login** option displays on the **File** menu. Select this option to access the **iCare Login** dialog.

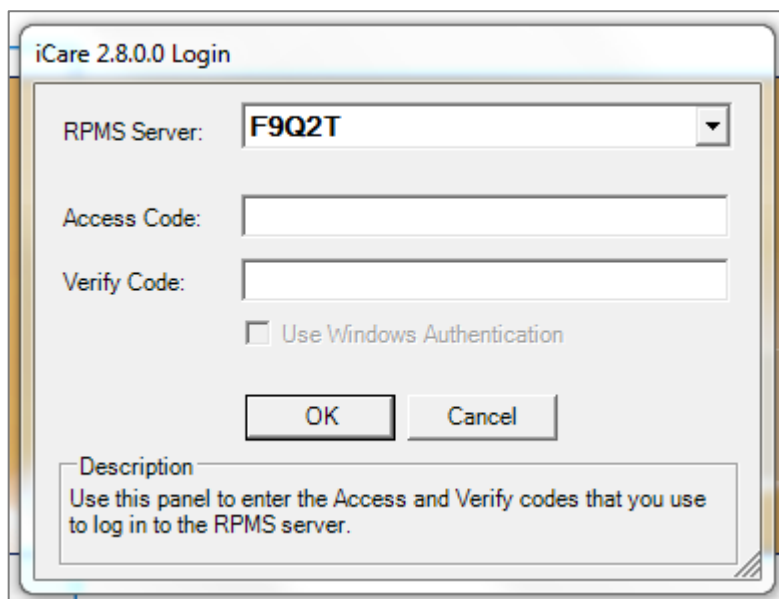


Figure 4-81: **iCare Login** dialog

RPMS Server

Click the list to access the **RPMS Server Management** dialog that displays a list of possible connections.

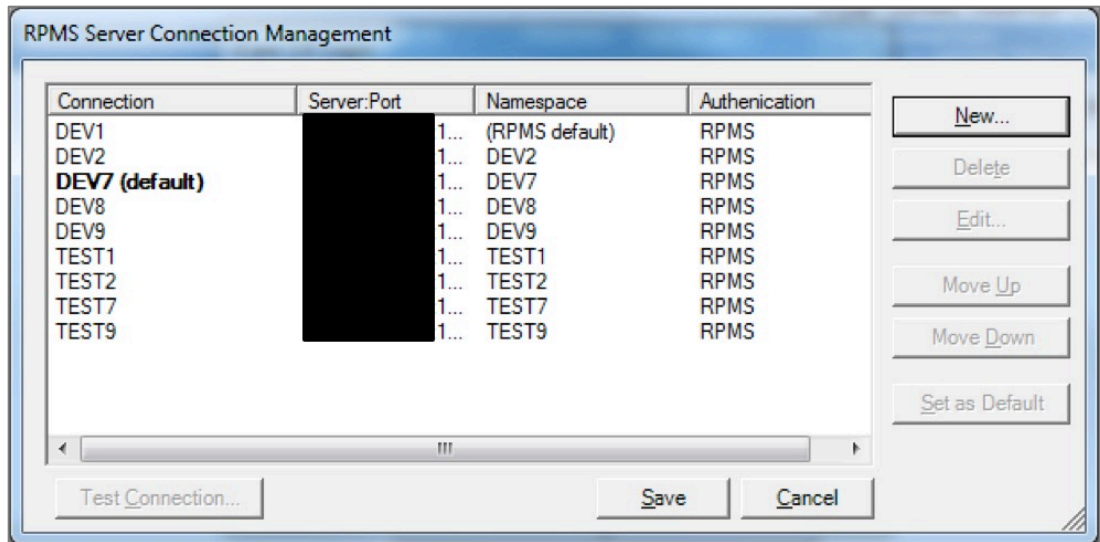


Figure 4-82: **RPMS Server Connection Management** dialog

Select an option on the grid or use the **New** function to create a new connection.

Click **New** to access the **Edit RPMS Server Connection** dialog.

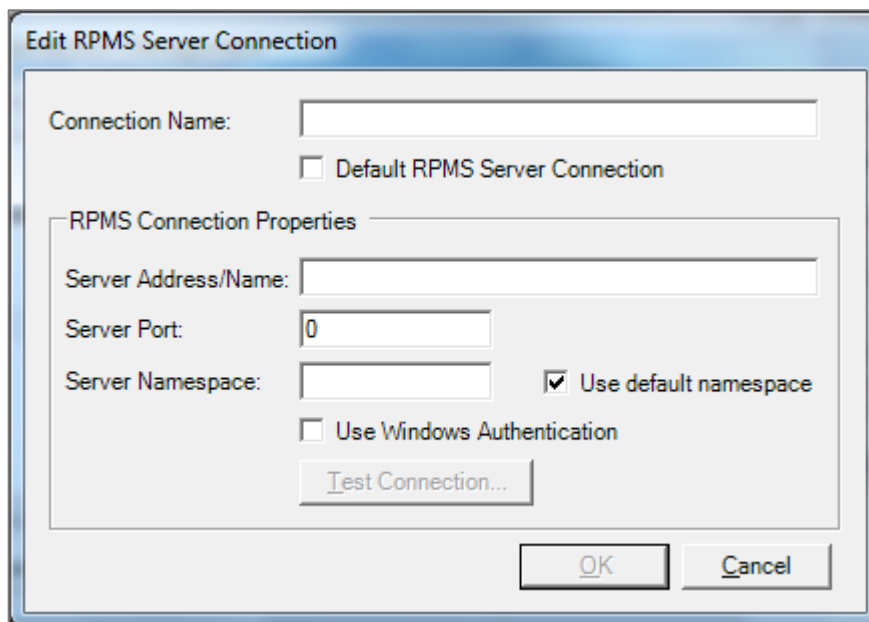


Figure 4-83: **Edit RPMS Server Connection** dialog

Do not select the **Default RPMS Server Connection** or **Use Windows Authentication** check boxes.

Connection Name

Type the name of the connection in this field. This is the name that will display on the **RPMS Server Connection management** dialog.

Server Address/Name

Type the number, including punctuation, of the server's IP address. An IP address is typically four groups of two or three numbers, separated by a period (.), e.g., 161.223.99.999. The Site Manager will provide this information.

Server Port

Type the number of the server port. The Site Manager will provide this information.

Server Namespace

If the user's site has multiple databases on one server, the user will also need to type the namespace, which is typically a text string, e.g., DEVEH.

Use default namespace

Select this check box to use the Server Namespace as the default.

After completing the fields, the **Test Connection** button becomes active. Click this button to access the **Test Login** dialog. Populate the **Access Code** and **Verify Code** fields and click **OK**.

- After clicking **OK**, if the connection is correct, the application displays the Connection Test message: "RPMS login was successful." Click **OK** to dismiss the message.
- Otherwise, the application will display an error message; click **OK** to return to the **Test Login** dialog.

After the **Edit RPMS Server Connection** dialog is complete, click **OK** to have the server connection display on the **RPMS Server Connection Management** dialog. Otherwise, click **Cancel**.

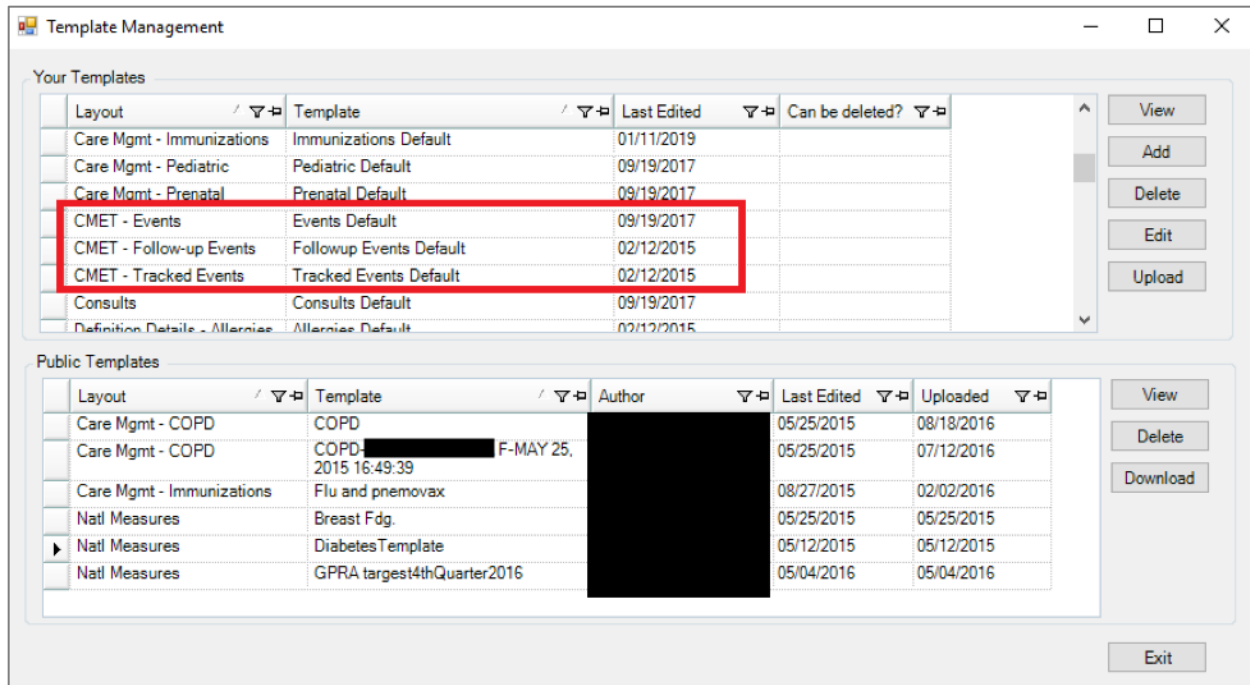
After the **RPMS Server Connection Management** dialog is complete, click **Save** (otherwise, click **Cancel**).

After clicking **Save**, the application displays the login dialog to the application.

4.13 Manage Templates

The **Manage Templates** option provides a means for defining multiple template layouts. Templates can also be created and added so that anyone can download and use them.

The **Manage Templates** option displays on the **Tools** menu. Select it to access the **Template Management** dialog.

Figure 4-84: **Template Management** dialog

The **Your Templates** group box contains a list of all of a specific user's defined templates and the layout contained in each template.

The **Public Templates** group box contains a list of all templates at the site that are available to be downloaded to the list in the **Your Templates** group box.

4.13.1 View

Use the **View** action to view a selected template. This is a view-only display.

4.13.2 Upload

The **Upload** action is available in the **Your Template** group box. Select a template to upload and click **Upload**. The selected template will display in the **Public Templates** group box. The author will be you (the person who executed the upload).

4.13.3 Download

The **Download** action is available in the **Public Templates** group box. Select a record to download and click **Download**. The selected template will display in the **Your Templates** group box. In the **Template** field, your name (the person who executed the download) will display after the name of the template.

4.13.4 Delete

The **Delete** action is available in the **Your Templates** and **Public Templates** group boxes and applies to your templates only. Select a record to delete and click **Delete**. The **Delete Template** information message displays confirming the deletion. Click **Yes** to delete (otherwise, click **No**.)

4.13.5 Edit

The **Edit** action is available in the **Your Templates** group box. Select a template to edit and click **Edit**. Access the template of columns for the selected template.

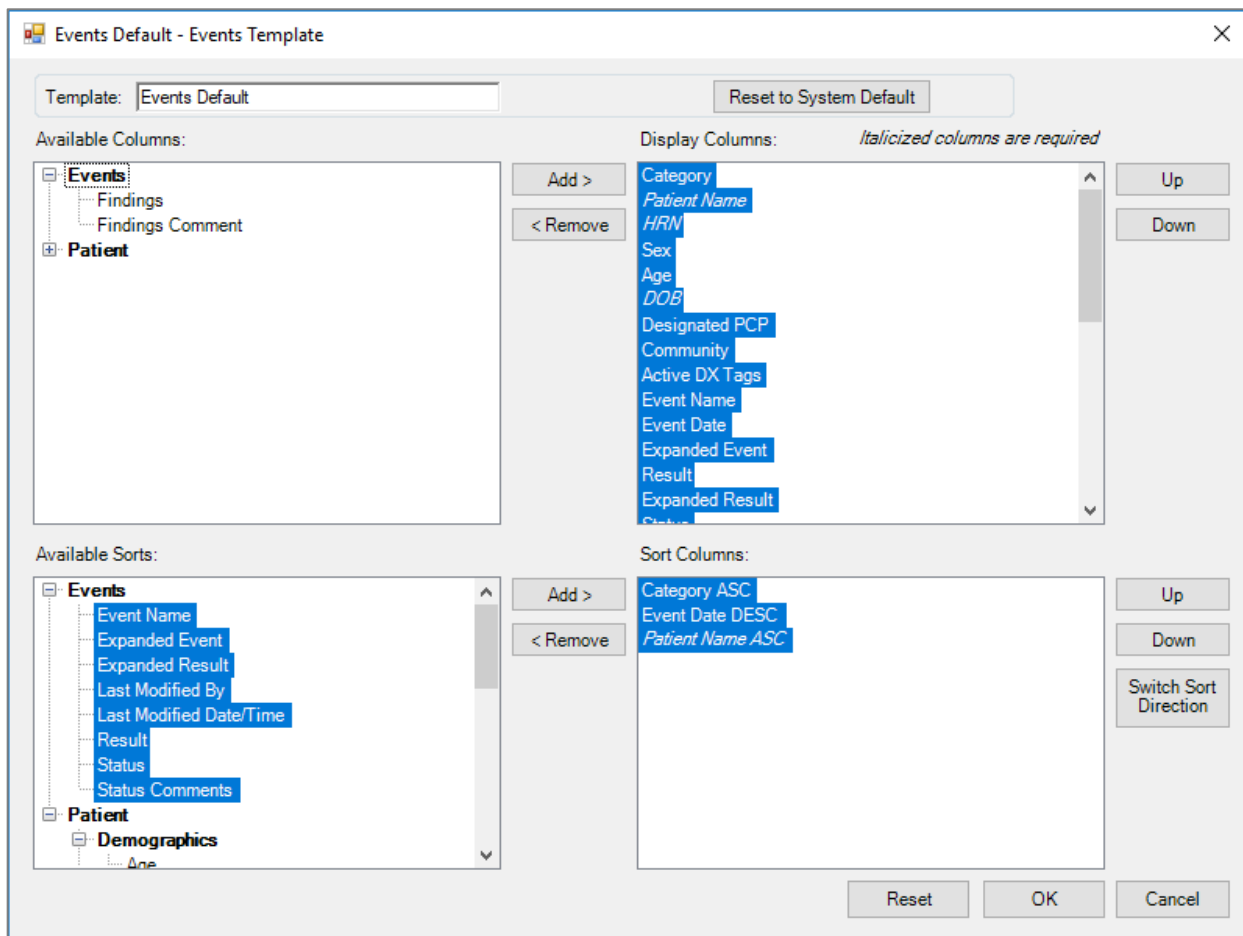
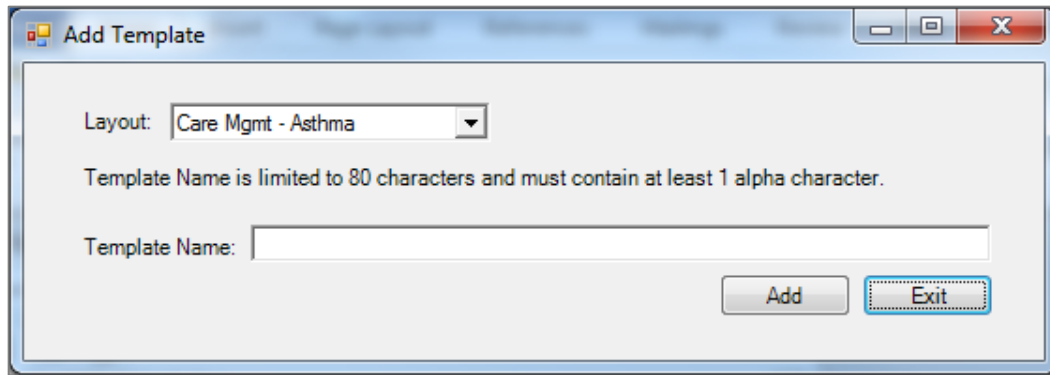


Figure 4-85: Edit Template

4.13.6 Add

The **Add** action is available in the **Your Templates** group box. Click **Add** to access the **Add Template** dialog.

Figure 4-86: **Add Template** dialog

Layout: Select an option from the **Layout** list to specify which layout to use for the new template.

Template Name: Type the name of the template in this free text field, which is limited to 80 characters and must contain at least one alpha character.

After the dialog is complete, click **Add** to access the template to define the columns and their sorts for your new template. (Otherwise, click **Exit**.)

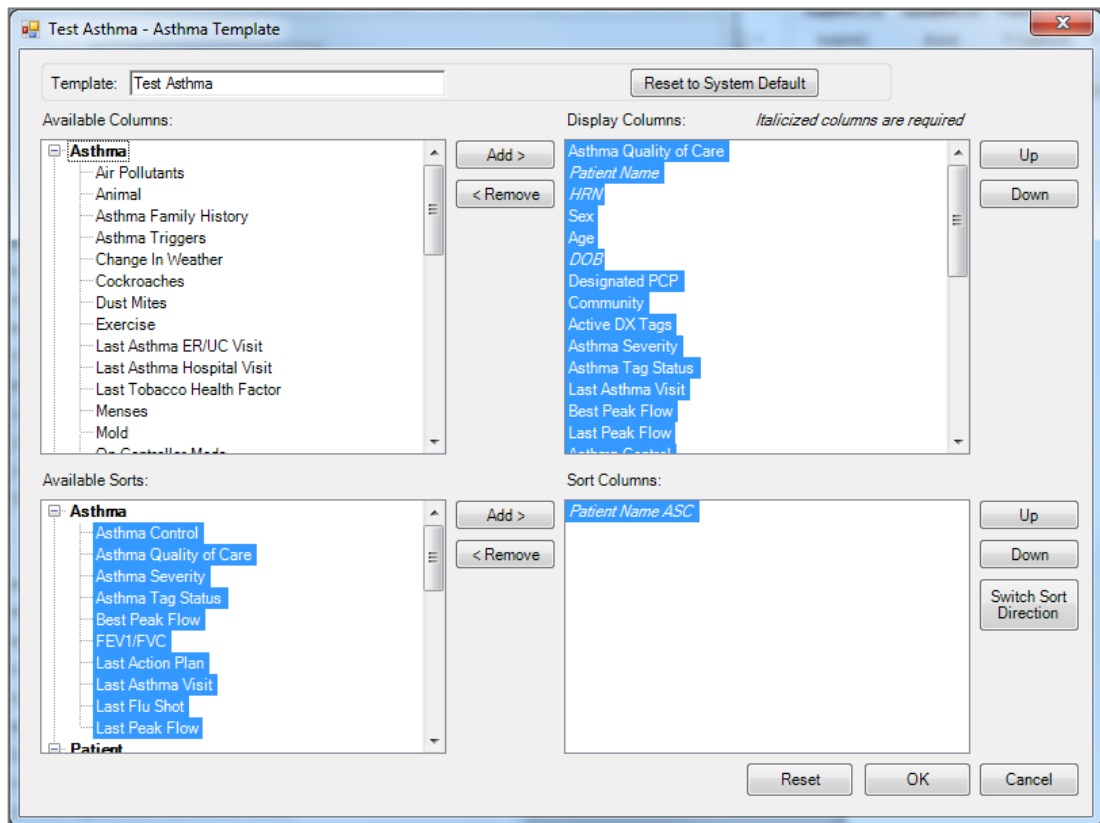


Figure 4-87: New template created

Click the **Reset to System Default** button to reset the template to the system default.

To discard changes, click **Reset**.

After the template window is complete, click **OK** and the new template will display in the **Your Templates** group box. (Otherwise, click **Cancel**.)

4.13.6.1 Display and Available Columns

Use the **Display Columns** to determine which columns to display for the particular window or tab.

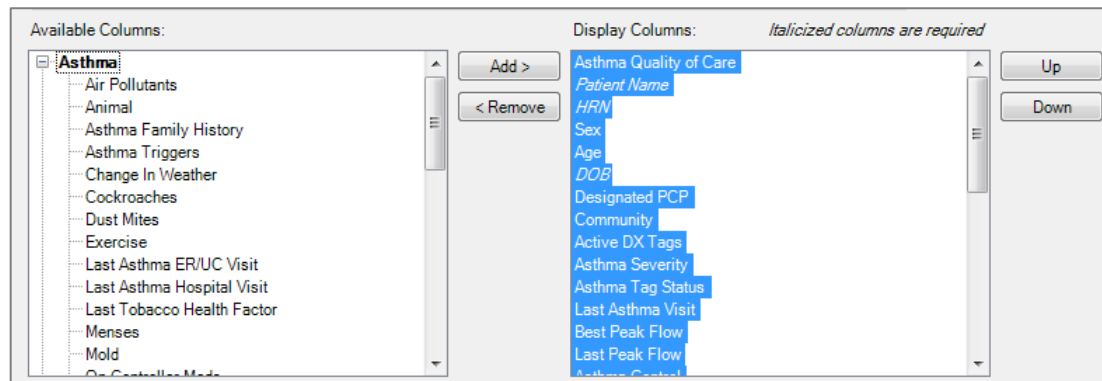


Figure 4-88: **Available** and **Display** columns

The listing in the **Display Columns** area shows the columns that will be displayed for your template. The column names in italics are required and cannot be removed.

To move a highlighted column name in the **Available Columns** area to the list in the **Display Columns** area, click **Add**. This moves the column name from the left panel to right panel.

Likewise, remove a highlighted column name in the **Display Columns** area and move it to the **Available Columns** area by clicking **Remove**. This moves the column name from the right panel to the left panel.

Note: Column names in italics are required and cannot be removed.

Determine the order the columns display in the **Display Columns** area by using the **Up** and **Down** buttons. Highlight a column name and click the appropriate button. Moving an item to the desired location may involve clicking the button more than once.

4.13.6.2 Columns to Sort

Sorting a column arranges the column items in alpha-numeric order.

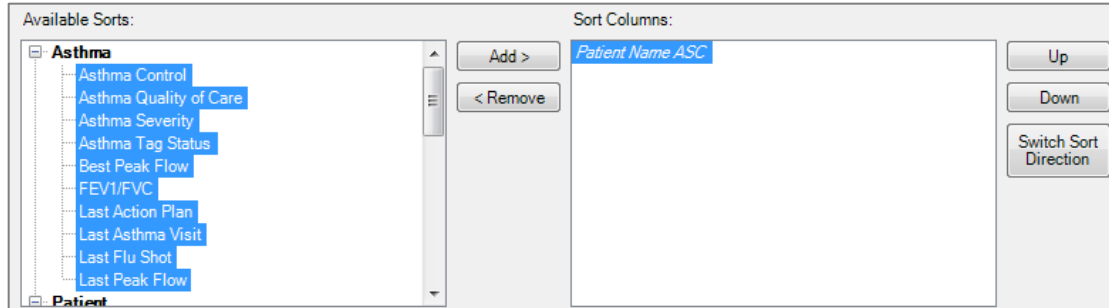


Figure 4-89: **Available Sorts** and **Sort Columns** area

To move a highlighted column name in the **Available Sorts** area to the list in the **Sort Columns** area, click **Add**. This moves the column name from the left panel to right panel.

Likewise, remove a highlighted column in the **Sort Columns** area and move it to the **Available Sorts** area by clicking **Remove**. This moves the column name from the right panel to the left panel.

Note: Column names in italics are required and cannot be removed.

4.13.6.3 Column Sort Order

Use the **Sort Columns** area to determine which columns to sort for the particular window or tab.

Determine the order in which the columns are sorted in the **Sort Columns** area by using the **Up** and **Down** buttons. Highlight a column name and click the appropriate button. It may take clicking the button more than once to move it to the desired location. For example, if **Gender**, **Patient Name**, and **Diagnosis Tags** are in the right column, then the **Gender** sort is applied first, then the **Patient Name**, and the **Diagnosis Tags** sort is applied last.

4.13.6.4 Switch Sort Direction

The names of columns in the **Sort Columns** area display “ASC” appended to the name, for example, **Patient Name ASC**. Switch the sort order for a selected column by clicking the **Switch Sort Direction** button. In the example, the name changes to **Patient Name DESC**. Use the **Switch Sort Direction** action on more than one column.

Appendix A: Care Management Events

A.1 BREAST

A.1.1 BREAST AUGMENTATION

BTPW BRST AUG PROC ICD Procedure

A.1.2 BREAST MRI

BTPW BRST MRI CPTS CPT Procedure

BTPW BRST MRI PROC ICD Procedure

A.1.3 BREAST RECONSTRUCTION W/IMPLANTS

BTPW BRST RECON W/ IMP CPTS CPT Procedure

BTPW BRST RECON W/IMP PROCS ICD Procedure

BTPW BRST RECON W/IMP DXS POV

A.1.4 BREAST RECONSTRUCTION W/OUT IMPLANTS

BTPW BRST RECON W/O IMP CPTS CPT Procedure

BTPW BRST RECON W/O IMP PROC ICD Procedure

A.1.5 BREAST RECONSTRUCTION,UNSPECIFIED

BTPW BRST RECON UNS PROC ICD Procedure

A.1.6 BREAST REDUCTION

BTPW BRST REDUC CPTS CPT Procedure

BTPW BRST REDUC PROC ICD Procedure

A.1.7 BREAST ULTRASOUND

BTPW BRST ULTRA-SND CPTS CPT Procedure

BTPW BRST ULTRA-SND PROC ICD Procedure

A.1.8 CENTRAL DUCT EXCISION

BTPW CENTRAL DUC EXC CPTS CPT Procedure

A.1.9	CLINICAL BREAST EXAM	
	BTPW CLIN BRST EXAM PROC	ICD Procedure
	BTPW CLIN BRST EXAM DXS	POV
	BTPW CLIN BRST EXAM CPTS	CPT Procedure
A.1.10	DUCTOGRAM	
	BTPW DUCTOGRAM CPTS	CPT Procedure
	BTPW DUCTOGRAM PROC	ICD Procedure
A.1.11	FINE NEEDLE ASPIRATION	
	BTPW FINE NEEDLE ASP CPTS	CPT Procedure
	BTPW FINE NEEDLE ASP PROC	ICD Procedure
A.1.12	LUMPECTOMY	
	BTPW LUMPECTOMY CPTS	CPT Procedure
	BTPW LUMPECTOMY PROC	ICD Procedure
A.1.13	MAMMOGRAM DX BILATERAL	
	BTPW MAMMOGRAM BI DX CPTS	CPT Procedure
A.1.14	MAMMOGRAM DX UNILATERAL	
	BTPW MAMMOGRAM UNI DX CPTS	CPT Procedure
A.1.15	MAMMOGRAM SCREENING	
	BTPW MAMMOGRAM SCREEN CPTS	CPT Procedure
	BGP MAMMOGRAM ICDS	POV
A.1.16	MAMMOGRAM,UNSPECIFIED	
	BGP MAMMOGRAM PROCEDURES	ICD Procedure
A.1.17	MASTECTOMY,BILATERAL (W/BI MOD .50)	
	BTPW BI MASTECTOMY CPTS	CPT Procedure
	BGP MASTECTOMY PROCEDURES	ICD Procedure

A.1.18	MASTECTOMY,UNILATERAL	
	BTPW UNI MASTECTOMY CPTS	CPT Procedure
	BGP UNI MASTECTOMY PROCEDURES	ICD Procedure
A.1.19	MASTECTOMY,UNSPECIFIED	
	BTPW MASTECTOMY UNS CPTS	CPT Procedure
A.1.20	NEEDLE BIOPSY	
	BTPW NEEDLE BX CPTS	CPT Procedure
	BTPW NEEDLE BX PROC	ICD Procedure
A.1.21	NEEDLE BIOPSY,GUIDED	
	BTPW NEEDLE BX GUIDED CPTS	CPT Procedure
A.1.22	NODE DISSECTION,AXILLARY	
	BTPW AX NODE DISECT CPTS	CPT Procedure
	BTPW AX NODE DISECT PROC	ICD Procedure
A.1.23	NODE DISSECTION,SENTINEL	
	BTPW SENT NODE DISECT CPTS	CPT Procedure
	BTPW SENT NODE DISECT PROC	ICD Procedure
A.1.24	OPEN BIOPSY	
	BTPW OPEN BREAST BX CPTS	CPT Procedure
	BTPW OPEN BREAST BX PROC	ICD Procedure
A.1.25	STEREOTACTIC BIOPSY	
	BTPW STEREO BX CPTS	CPT Procedure
A.2	CERVICAL	
A.2.1	COLPOSCOPY IMPRESSION	
	BTPW COLP IMP NO BX CPTS	CPT Procedure
	BTPW COLP IMP NO BX PROC	ICD Procedure

A.2.2	COLPOSCOPY W/ BIOPSY	
	BTPW COLP WITH BX CPTS	CPT Procedure
	BTPW COLP WITH BX PROC	ICD Procedure
A.2.3	CONE BIOPSY	
	BTPW CONE BX CPTS	CPT Procedure
	BTPW CONE BX PROC	ICD Procedure
A.2.4	CRYOTHERAPY	
	BTPW CRYOTHERAPY CPTS	CPT Procedure
	BTPW CRYOTHERAPY PROC	ICD Procedure
A.2.5	DILATION AND CURETTAGE	
	BTPW D&C CPTS	CPT Procedure
	BTPW D&C PROC	ICD Procedure
A.2.6	ENDOCERVICAL CURETTAGE	
	BTPW ENDOCERVICAL CURR CPTS	CPT Procedure
	BTPW ENDOCERVICAL CURR PROC	ICD Procedure
A.2.7	ENDOMETRIAL BIOPSY	
	BTPW ENDOMETRIAL BX CPTS	CPT Procedure
	BTPW ENDOMETRIAL BX PROC	ICD Procedure
A.2.8	HPV - DNA SCREEN	
	BTPW HPV DNA SCREEN CPTS	CPT Procedure
	BTPW HPV DNA SCREEN DXS	POV
	BTPW HPV DNA SCREEN LOINC	LAB (LOINC)
	BTPW HPV DNA SCREEN TAX	LAB
A.2.9	HYSTERECTOMY	
	BGP HYSTERECTOMY CPTS	CPT Procedure
	BGP HYSTERECTOMY PROCEDURES	ICD Procedure

A.2.10 LASER ABLATION

BTPW LASER ABLATION CPTS	CPT Procedure
BTPW LASER ABLATION PROC	ICD Procedure

A.2.11 LASER CONE

BTPW LASER CONE CPTS	CPT Procedure
BTPW LASER CONE PROC	ICD Procedure

A.2.12 LEEP

BTPW LEEP CPTS	CPT Procedure
BTPW LEEP PROC	ICD Procedure

A.2.13 PAP SMEAR

BGP CPT PAP	CPT Procedure
BQI PAP PROCEDURES	ICD Procedure
BGP PAP LOINC CODES	LAB (LOINC)
BGP PAP SMEAR TAX	LAB

A.2.14 PELVIC EXAM

BTPW PELVIC EXAM CPTS	CPT Procedure
BTPW PELVIC EXAM PROC	ICD Procedure
BTPW PELVIC EXAM DXS	POV

A.2.15 PELVIC ULTRASOUND

BTPW PELVIC U/S CPTS	CPT Procedure
BTPW PELVIC U/S PROC	ICD Procedure

A.2.16 PERIANAL BIOPSY

BTPW PERIANAL BX CPTS	CPT Procedure
BTPW PERIANAL BX PROC	ICD Procedure

A.2.17 VAGINAL ULTRASOUND

BTPW VAGINAL U/S CPTS	CPT Procedure
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A.3 COLON

A.3.1 COLONOSCOPY

BTPW COLONOSCOPY CPTS	CPT Procedure
BGP COLO PROCS	ICD Procedure

A.3.2 DOUBLE CONTRAST BARIUM ENEMA

BGP BE CPTS	CPT Procedure
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A.3.3 FECAL OCCULT BLOOD TEST (FOBT)

BGP FOBT CPTS	CPT Procedure
BGP FOBT LOINC CODES	LAB (LOINC)
BGP GPRA FOB TESTS	LAB

A.3.4 FLEXIBLE SIGMOIDOSCOPY

BTPW SIGMOID CPTS	CPT Procedure
BGP SIG PROCS	ICD Procedure

A.4 LIVER

A.4.1 Hepatitis C Confirm

BQI HEP C CONFIRM LOINC CODES	LAB (LOINC)
BQI HEP C CONFIRM TESTS	LAB

A.4.2 Hepatitis C Genotype

BQI HEP C GENOTYPE LOINC	LAB (LOINC)
BQI HEP C GENOTYPE TESTS	LAB

A.4.3 Hepatitis C Screen

BQI HEP C SCREEN LOINC CODES	LAB (LOINC)
BQI HEP C SCREEN TESTS	LAB

A.5 SKELETAL

- A.5.1 OSTEOPOROSIS SCREENING - DXA CENTRAL**
 BTPW DXA CENTRAL CPTS CPT Procedure
- A.5.2 OSTEOPOROSIS SCREENING - GENERAL**
 BTPW OSTEO SCREEN PROC ICD Procedure
 BTPW OSTEO SCREEN DXS POV
- A.5.3 OSTEOPOROSIS SCREENING - PERIPHERAL DXA**
 BTPW PERIPH DXA CPTS CPT Procedure
- A.5.4 OSTEOPOROSIS SCREENING - QUANTITATIVE CT**
 BTPW QUAN CT CPTS CPT Procedure
- A.5.5 OSTEOPOROSIS SCREENING - QUANTITATIVE
 ULTRASOUND**
 BTPW QUAN U/S CPTS CPT Procedure
- A.6 STI**
- A.6.1 CHLAMYDIA SCREEN**
 BTPW CHLAMYDIA CPTS CPT Procedure
 BQI CHLAMYDIA SCREEN DXS POV
 BGP CHLAMYDIA LOINC CODES LAB (LOINC)
 BGP CHLAMYDIA TESTS TAX LAB
- A.6.2 GONORRHEA SCREEN**
 BKM GONORRHEA TESTS CPTS CPT Procedure
 BKM GONORRHEA LOINC CODES LAB (LOINC)
 BKM GONORRHEA TEST TAX LAB
- A.7 PROSTATE**
- A.7.1 Prostate Screen**
 BQI PROSTATE SCRN CPTS CPT Procedure

	BQI PSA LOINC CODES	LAB (LOINC)
	BQI PSA TEST	LAB
A.7.2	Prostate Biopsy	
	BQI PROSTATE BIOPSY CPTS	CPT Procedure
A.7.3	Prostate Ultrasound	
	BQI PROSTATE ULTRASOUND CPTS	CPT Procedure

Appendix B: 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.

B.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).

B.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.

B.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 policies and procedures prior to interconnection to or transferring data from RPMS.

B.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.

B.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.

B.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.

B.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).

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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

Context Menu

The menu of options that displays when right-clicking on an entity.

Designated Primary Care Provider

In RPMS, the provider name that is assigned as the primary care physician for a patient or group of patients at a specific facility. This is not a required function.

Free Text Field

A field where the user can type text, just like typing a note to someone.

iCare Package Manager

The designated person with the authority to manage all information settings for iCare.

Providers

Any staff member in an I/T/U facility who provides direct healthcare to patients, e.g. general practice or specialty physicians, registered nurses, social workers, physician assistants, etc.

Taxonomy

In RPMS, a grouping of functionally related data elements, such as ICD codes, that are created and maintained within the RPMS Taxonomy Setup application. Taxonomies will be used as definitions for diagnoses, procedures, lab tests, medications, and other clinical data types.

To change or add to an existing taxonomy, please see a CRS coordinator.

Tooltip/Hover Help

A common GUI element used to provide additional information to users. To display a Tooltip, hover the mouse pointer, without clicking, over a column heading or field.

Acronym List

Acronym	Term Meaning
BH	Behavioral Health
CMET	Care Management Event Tracking
CQM	Clinical Quality Measures
DOB	Date of Birth
DPCP	Designated Primary Care Provider
DSPM	Designated Specialty Provider Management
GUI	Graphical User Interface
HHS	Health and Human Services
HRN	Health Record Number
ICD	International Classification of Diseases
IHS	Indian Health Service
IPC	Improving Patient Care
OIT	Office of Information Technology
PM	Performance Measures
RPMS	Resource and Patient Management System

Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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

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