



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Referred Care Information Systems/EHR Component

(BMC)

Installation Guide & Release Notes

Version 4 Patch 7 May 2011

Office of Information Technology (OIT) Division of Information Resource Management Albuquerque, New Mexico

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1.0 Installation Notes

Prefix: BMC

Current Version: 4.0 Patch 7

1.1 Contents of Distribution

| File | Description |
|-------------------------------------|--|
| IHSReferredCare.PatientReferral.vor | Object File for Referral tab (EHR) |
| IHSReferredCare.Referral.vor | Object File for RCIS tab (EHR) |
| IHSReferredCare.PatientReferral.dll | DLL file (EHR) |
| IHSReferredCare.Referral.dll | DLL file (EHR) |
| bmc_0400.07k | KIDS build for BMC v4.0 patch 7 (RPMS) |
| bmc_0400.07n | Notes File for BMC v4.0 patch 7 (RPMS) |
| bmc_0400.07i.pdf | Install Guide |
| bmc_0400.07o.pdf | User Guide Addendum |

1.2 Required Resources

- 1. Electronic Health Record (EHR) v1.1
- 2. BMC v4.0
- 3. BJMD v1.0 (For C32 Reporting)
- 4. ICare Management System 2.0
- 5. AGG Visual Registration v1.0
- 6. Order Entry/Results Reporting v3.0 patch 190
- 7. Veterans Administration (VA) FileMan 22 or higher
- 8. VA Kernel 8 or higher
- 9. Indian Health Service (IHS) Dictionaries (Patient) v99.1 patch 16
- 10. Taxonomy Package v5.1 patch 5
- 11. IHS Dictionaries (Pointers) AUT v98.1 patch 20
- 12. Lexicon 2.0

13. IHS International Classification of Disease (ICD)/Current Procedural Terminology (CPT) Lookup & Grouper AICD v3.51 patch 7

1.3 Before You Begin: Installation Issues

All EHR and Resource and Patient Management System (RPMS) users should be logged off the system during the installation process.

Installation will require administrator access to the VueCentric System Management Utility (VcManager).

2.0 Installation Instructions

2.1 KIDS Distribution

- 1. Load the Distribution into Kernel Installation and Distribution System (KIDS) using Option 1 on the KIDS Installation menu. The distribution was released in a file named bmc_0400.07k.
- 2. Verify the load using Option 2 on the KIDS Installation menu.
- 3. Consider using Options 3 and 4 on the KIDS Installation menu to print and compare the Transport.
- 4. Install the distribution using Option 6 on the Installation menu.
- 5. For results, read the generated MailMan message, or use the KIDS Install File Print option to view/print the BMC*4.00*7 entry.
- 6. The postinstall routine, BMC4P6, will deliver a patch installation mail message to local users that hold the BMCZMENU, XUMGR, XUPROG, or XUPROGMODE security key.

2.2 Mailman Setup

2.2.1 RCIS Parameters

Review the settings listed under RCIS Menu | MGT | ESP (Edit Site Parameters)

Under the "Mailman/Alert Parameter" option, verify that the following items (Figure 2-1) are all set to YES.

```
******* UPDATE BULLETIN/MESSAGE RELATED RCIS SITE PARAMETERS *******
WHEN ADDING/EDITING A REFERRAL
PROMPT TO SEND MESSAGE FOR CHS REFERRALS? YES
PROMPT TO SEND MESSAGE FOR IHS REFERRALS? YES
PROMPT TO SEND MESSAGE FOR OTHER REFERRAL TYPE? YES
PROMPT TO SEND MESSAGE FOR IN-HOUSE REFERRALS? YES
Auto Send Alert to Referring Physician: YES
Auto Send Alert to Patient's Primary Provider: YES
Print Patient Name in subject line of Message: YES
```

Figure 2-1: Referred Care Information System (RCIS) parameter

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2.2.2 Mailman Groups

In order for the Contract Health (CHS) staff to receive mailman messages for new referrals created in EHR, updates will need to be made to the following BMC mail groups using Fileman:

- BMC CHS ALERT
- BMC IHS ALERT
- BMC INHOUSE ALERT
- BMC OTHER ALERT

If there are site-created alerts that also begin with BMC (Figure 2-2), then the last alert on the list will need to be included in the following update.

```
Select MAIL GROUP NAME: BMC

1 BMC CHS ALERT

2 BMC IHS ALERT

3 BMC INHOUSE ALERT

4 BMC OTHER ALERT

5 BMC SITE SPECIFIC

CHOOSE 1-5:
```

Figure 2-2: List of BMC mail groups

For the BMC CHS ALERT, BMC IHS ALERT, and the last BMC mail group on the list, perform the following steps:

- 1. Add the CHS staff to the list of members for the mail group.
- 2. Verify that the TYPE field is set to PUBLIC.
- 3. Set the AUTHORIZED SENDER field to blank or empty.

For the BMC INHOUSE ALERT and BMC OTHER ALERT, perform the following steps:

- 1. Add the CHS staff to the list of members for the mail group.
- 2. Set the TYPE field to PRIVATE.
- 3. Set the AUTHORIZED SENDER field to blank.
- 4. Exit the mail group edit.
- 5. Reenter the same mail group and set the TYPE field back to PUBLIC. This refreshes the TYPE field so that it will behave as a public mail group.

INPUT TO WHAT FILE: MAIL GROUP// EDIT WHICH FIELD: ALL// Select MAIL GROUP NAME: BMC CHS ALERT NAME: BMC CHS ALERT// Select MEMBER: DEMO, CHS// MEMBER: DEMO, CHS// TYPE: Select MEMBER: DESCRIPTION: A Bulletin is sent when a CHS Type Referral is entered Edit? NO// TYPE: public// ORGANIZER: ADAM, ADAM// COORDINATOR: Select AUTHORIZED SENDER: ALLOW SELF ENROLLMENT ?: REFERENCE COUNT: 29// LAST REFERENCED: MAY 6,2011// **RESTRICTIONS:**

Figure 2-3: Fileman screen capture for Mailman Group update

2.3 EHR-Referred Care Component Installation

The EHR installation procedure includes these three stages:

- 1. Adding two dll files to the lib folder on the EHR network share
 - a. IHSReferredCare.PatientReferral.dll
 - b. IHSReferredCare.Referral.dll
- 2. Importing two .vor files to VueCentric Object Registry
 - a. IHSReferredCare.PatientReferral.vor
 - b. IHSReferredCare.Referral.vor
- 3. Modifying Provider template to add two referral components

Note: For Citrix and Terminal Server setups, ensure that the shared files on the server are updated. Desktop setups will need the local files updated on each workstation.

2.3.1 Stage 1–DLL Files

- Copy the two .dll files into the EHR lib folder on the main EHR network share.
 - IHSReferredCare.PatientReferral.dll
 - IHSReferredCare. Referral.dll

2.3.2 Stage 2–VOR Files

1. Open vcManager.exe located in EHR\bin or EHR\util folder.

| 🗱 VueCentric System Management | [161.223.92.251 - TEHR] | |
|---|---|--|
| File Help | | |
| About Object Registry Template Registry | Site Parameters Shutdown Monitor | |
| Objects (132): ● BEHALERTS ALERTS ● BEHALLERGIES, ALLERGIES ● BEHARTENTRY, ARTENTRY ● BEHCONSULTORDERS, CONSULTORDE ● BEHCONSULTORDERS, CONSULTORDE ● BEHCONSULTS, CONSULTS ● BEHCONTEXTADAPTER, CONTEXTADA ● BEHCONSULTS, CONSULTS ● BEHCONSECTATOR ● BEHCONSULTS, CONSULTS ● BEHCONTEXTADAPTER, CONTEXTADA ● BEHCOSUMM, DCSUMM ● BEHDOSUMM, DCSUMM ● BEHOOSUM, CWAD ● BEHOOSUMM, DCSUMM ● BEHOOSUMM, DCSUMM ● BEHOOSUM, CRUME ● BEHOOSUM, CWAD ● BEHOOSUM, CWAD ● BEHOOSUM, CRUME ● BEHOOSUM, REVIEW ● BEHESIGSERVICE, ESIGSERVICE ● Restrict List To: ● ● VueCen | <<<<< Select an object in the left pane | |
| Refresh All | | |

Figure 2-4: VC Manager Screen

- 2. Select the **Object Registry** tab.
- 3. Go to File | Import.
- 4. Select **IHSReferredCare.PatientReferral.vor** and click open to import.



Figure 2-5: Select Import Object screen

5. Click **Apply** to save the information.

| 💸 VueCentric System Management | [161.223.92.251 - TEHR] | |
|---|---|--------------------|
| File Help | | |
| About Object Registry Template Registry | y Site Parameters Shutdown Monitor | |
| Objects (132): | COM Registration Programmatic ID: IHSREFERREDCARE.REFERRALVIEW Version: Source: IHSReferredCare.Referral.dll VueCentric Settings General Info Technical Info Pronentu Initializations Denoendencies Reneral Settings Source: IHSReferredCare.Referral.dll Name: Referral/New Class ID: (3CE 975F7-E 359-4717-BAA4-4A610401C579) Checksum: 026C6F595340260AD 4109D 3C5D 991FBA Version: Height: Width: | Copy Jnregister |
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Figure 2-6: Object Loaded view in VC Manager

- 6. Repeat the Import (Steps 3–5) for the IHSReferredCare.Referral.vor file.
- 7. Close the VC Manager application when complete.

2.3.3 Stage 3–Provider Template

- 1. Open the EHR application and log in.
- 2. Right-click the header to display a context menu.
- 3. Select **Design Mode** (see Figure 2-7).

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Figure 2-7: **Design Mode** option

- 4. Select the Layout Manager from the Design menu (Figure 2-8).
- 5. Highlight **Tabbed Notebook** and click **Properties**.

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Figure 2-8: Design menu: Layout Manager

6. Select the **Tab Editor** and add a new tab named **RCIS**. Click **OK**.

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Figure 2-9: EHR Designer Mode–Create new RCIS tab

- 7. To add an object to the new **RCIS** tab, click **Add** (+) and expand the **Type** | **Object** list (Figure 2-10).
- 8. Select the **ReferralView** object from the list and click **Add**.



Figure 2-10: EHR Designer Mode–Add ReferralView object to **RCIS** tab

9. Open the properties for **ReferralView** and select **Align–All** to expand the component inside the **RCIS** tab.

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Figure 2-11: EHR Designer Mode–Align Setting in Object Properties

- 10. Now to add another new tab under the **Patient Chart** tab using the Layout Manager.
- 11. Open the properties for the Tabbed Notebook located under Patient Chart.

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Figure 2-12: EHR Designer Mode–Layout Manager Close-up

12. Use the Tab Editor to add a new tab named **Referrals** and click **OK**.

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Figure 2-13: EHR Designer Mode–Add tab to Patient Chart

13. Add an Object to the new **Referrals** tab and select the **PatientReferral** object (see Steps 7–8).

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Figure 2-14: EHR Designer Mode–Add PatientReferral object to Referrals tab

- 14. Select **Align–All** in the **PatientReferral** properties to expand the component inside the **Referrals** tab (See Figure 2-11)
- 15. Save the design to the Provider template. The Provider template is generally titled **%Provider**.

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Figure 2-15: EHR Designer Mode–Save As screen for Provider template

3.0 Installation Verification

- 1. Log in to EHR as a Provider.
- 2. The **RCIS** tab should show referrals authored by the currently logged-in provider (see below).

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| Edit Referral | Add Secondary Referral Print | C32 Referral | | | | | | | |
| Referral Date | From Wednesday, March | 09, 2011 💌 | To Wednesday, March D | 9, 2011 💌 | | | | | |
| Chart Number | Patient Name | Referral Date | Purpose | Referring Provider | Referral Number | CHS Status | Facility Referred To | Appointment Date/Ti | C32 Printed By |
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Figure 3-1: RCIS tab window

- 3. Go to the **Patient Chart** tab..
- 4. Select a patient.
- 5. The **Referrals** tab under patient chart should display the referrals for the patient as shown below.

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| User Patient Tools | Help | | | | | | | | | | | |
| Patient Chart | Communication | RPMS | CIHA Intranet | Micromedex | E-Mail | | RCIS | | | | | |
| Demo,Patient Refe 323289 22-Feb | rral 1970 (41) M | | Visit not sel DEMO,PROV | lected IDER A | | | Primary Care | Team Unassigned | No Postings | Ø | | |
| Add Mini Referral A | dd Referral Edit Referral Add | Secondary Referral | Print C32 for Refe | rral | | | | | | | | |
| Referral Date From | Wednesday, February 23, 20 | 11 💌 To | Thursday , Febru | ary 24, 2011 💌 | | | | | | | | |
| Referral Date | Purpose | Refer | ring Provider | Referral Number | CHS Status | Facility Rel | erred To | Appointment Date/Time | C32 Printer | d By | C32 | 2 Print I |
| FEB 23, 2011 | Call-In | DEM |),PROVIDER A | 5059011100110 | PENDING APP | <unknov< th=""><th>/N></th><th></th><th></th><th></th><th></th><th></th></unknov<> | /N> | | | | | |
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| Notifications Cove | er Sheet Triage Wellnes: | s Notes Ord | ers Medications | Labs Prob/POV | Services Reports | D/C Sur | m Consults | Privacy WCM | ASQ Sui | cide F | Referrals | |
| DEMO, PROVIDER A | DEMO.OKLAHOMA.IHS.G | OV DEMO IND | IAN HOSPITAL | 14-Mar-2011 13:41 | | | | | | | | |

Figure 3-2: Referrals tab under Patient Chart

Note: The following verification steps will only work at sites that have the MPI/C32 module installed.

- 6. Select a referral from the list.
- 7. Click **Print C32 for referral**.
- 8. A C32 document should display in a separate window (refer to Figure 3-3).
- 9. Click **Print** to select a printer and then click **OK**.

| Patient Re | resh Data Toolo | | | Created On: March 11, 20) | 11 | | | |
|-------------------|-------------------------------|--|--|---|---|---|---------------------------|--|
| nt One,Ge i 15 | neratelist Mar-1970 (40) F | Patient: | GENERATELIST PATIENT ONE | | MRN: 8995_P49, 20046 | | | |
| | No | P. 4.1. | | | | | | |
| ADOME | Postings | Birthdate: Guardian: | March 15, 1970 | N | Sex: Female | | | |
| and and | add performed and | | | 5.° | | | | |
| ral Date Fr | om Thursday , | Table of Conte | nts | | | | | |
| destal Date | ACTIVE BEF | FFF - Allergies and Adverse Reactions - Encounters | | | | | | |
| | | Conditions or I | Problems | | | | | |
| | | Date | Name | | | Status | ICD-9 | |
| | | Date 01/19/2011 | Problems Name Coronary Atherosclerosis Of Unspecified Ty | rpe Of Vessel,native Or Graft | | Status Active | ICD-9 414.00 | |
| | | Date 01/19/2011 08/04/2010 | Problems Name Coronary Atheroseleronis Of Unspecified Ty Exercise Induced Bronchospasm | npe Of Vessel,native Or Graft | | Status Active | ICD-9 414.00 493.81 | |
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| | | Date Old (1) 01/19/2011 08/04/2010 Allergies and A No Allergy Informa Encounters Date/Time 02/10/2011 16 52 02/10/2011 16 53 | Vrohens Vanne Coronary Atheroscierosis Of Unspecified Ty Exercise Induced Bronchorpasm dverse Reactions thon for the report generation ordenia. However, Location 00 DEMO THS CLINIC 00 DEMO THS CLINIC | rpe Of VerreLnative Or Graft , some allergy information may co Clinic GENTERAL GENTERAL | me from the problem list and may be includ Description Service Category AMBULAT Service Category DAY SURG | Status Active led in the Co YORY JERY | ICD-9 414.00 493.81 | |
| SUPER | DEMD IHS GOV | Containers of J Date 01/19/2011 0B/04/2010 Allergies and A No Allergy Informa Encounters Date/Time 02/09/2011 1652 02/09/2011 1632 01/19/2011 1031 01/19/2011 1031 | Verblens Vane Coronary Atheroreleronis Of Unspecified Ty Exercise Induced Bronchorpasm dverse Reactions hon for the report generation ordenia. However, Veration DEMO THS CLINIC DEMO THS CLINIC DEMO THS CLINIC | rpe Of VerseLnative Or Graft some allergy information may co Clinic GENERAL GENERAL GENERAL | me from the problem list and may be includ Description Service Category: AMBULAT Service Category: DAY SURC Service Category: AMBULAT | Status Active led in the Co VORY JERY YORY | ICD-9 414.00 493.81 | |

Figure 3-3: Example of C32 Report

Contact Information

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

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

Fax: (505) 248-4363

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

E-mail: support@ihs.gov