



RESOURCE AND PATIENT MANAGEMENT SYSTEM

EHR & Meaningful Use for Health Information Management Professionals

Agenda

May 13-16, 2013

Office of Information Technology (OIT)
Albuquerque, New Mexico
and
Aberdeen Area, Alaska Area Office – ANTHC, Bemidji Area Office, Alaska
Area Office - SEARHC & Juneau,
California Area Office, Cherokee Nation Health Services,
Nashville Area Office, Navajo Area Office, Oklahoma Area Office,
Phoenix Area Office, Phoenix Area (Reno), Portland Area Office, Tucson
Area Office

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1.0 General Information

1.1 Purpose of Training

The Resource and Patient Management System Electronic Health Record (RPMS EHR) is a suite of software applications that moves a facility from a paper to Electronic Health Record technology for the purpose of meeting Meaningful Use (MU) to improve patient care. Medicare and Medicaid EHR Incentive Programs provide a financial incentive for the “Meaningful Use” of certified EHR technology to achieve health and efficiency goals.

The purpose of this intense hands-on course is to provide Health Information Management (HIM) professionals with an understanding of:

- Requirements and expectations of Meaningful Use as it applies to HIM roles and responsibilities.
- Policy, objectives, staff responsibilities, and standards relating to health record services as it pertains to electronic health information.

The “need” for this course was determined from (a) the need for an understanding of Meaningful Use and HIM reports, requirements, and maintenance; (b) requests from sites and Area Health Information Management (HIM) Consultants; (c) Area Clinical Application Coordinator (CAC) and HIM meetings; and (d) Meaningful Use deployment plan.

1.2 Prerequisites

This intense one week hands-on class is designed for HIM professionals including but not limited to RHIA, RHIT, Certified Coders (CPC, CCS, CCS-P, CPC-H, CPC-I, CCA, etc.) and other Health Information personnel who provide ongoing support for health care providers participating in the Meaningful Use incentive program. The class is also for HIM professionals who have oversight of RPMS packages associated with the Certified Electronic Health Record including the RPMS EHR, Health Information Exchange (HIE), Personal Health Records (PHR), Meaningful Use reports, and others.

Knowledge, skills, and competencies required for this course include cognitive knowledge and competent utilization to include:

- Understanding the RPMS PCC and EHR architecture
- Delineating the expectations, roles, and responsibilities of HIM professionals concerning issues that surround the Certified RPMS EHR and Meaningful Use
- Experience navigating through RPMS EHR and its tabs

- Experience or training navigating through RPMS PCC Data Entry fields and use of PCC mnemonics
- Experience with running reports for maintaining a complete and accurate medical record

1.3 Guidelines for Receiving Continuing Education Credit

The education planning committee has put together an extraordinary program for Health Information Management (HIM) Professionals. To receive a certificate of continuing education, you must (a) attend the educational event in its entirety, (b) document your attendance on the sign-in sheet and (c) successfully complete an on-line evaluation at the end of the course. Survey Monkey(R) will be used to evaluate presenters and the overall training. Continuing Education will only be awarded to those participants that have completed the entire course. There will be no partial credit.

2.0 Learning Objectives

See Detailed Agenda (Section 4.0).

3.0 Instructors and Facilitators

Disclosure Statement: In order to ensure balance, independence, objectivity, and scientific rigor in its educational activities, the (a) course directors/coordinators, (b) planning committee members, (c) faculty, and (d) all others who are in a position to control the content of this educational activity are required to disclose all relevant financial relationships with any commercial interest related to the subject matter of the educational activity. Safeguards against commercial bias have been put in place. Faculty will also disclose any off-label and/or investigational use of pharmaceuticals or instruments discussed in their presentation. The course directors/coordinators, planning committee members, and faculty for this activity have completed the disclosure process and have indicated that they do not have any significant financial relationships or affiliations with any manufacturers or commercial products to disclose.

3.1 Albuquerque, NM (OIT), New Mexico

- Anne Spencer, RHIT, Albuquerque Area HIM Consultant
- David Taylor, MHS, RPh, PA-C,RN, OIT EHR Training & Deployment Manager
- Jacque Candelaria, Meaningful Use Coordinator, Albuquerque Area
- James Garcia, PMP, MPI Manager, Office of Information Technology

3.2 Aberdeen Area Office, South Dakota

- Heather McClane, MBA, Aberdeen Area HIM Consultant
- Leslye Rauth, MPH, RD, CDE, Aberdeen Area Clinical Applications Coordinator
- Tammy Brewer, CPC, Cheyenne River Health Center, Clinical Applications Coordinator

3.3 Alaska Native Tribal Health Consortium (ANTHC), Alaska

- Frances Newsted, RHIA, Alaska Area HIM Consultant
- Kimiko Gosney, MS, CC, ANTHC Clinical Applications Coordinator

3.4 Bemidji Area Office, Minnesota

- Phillip Talamasy, Bemidji Area HIM Consultant
- Teresa Chasteen, RHIT, Bemidji Area Clinical Applications Coordinator

3.5 California Area Office, Sacramento

- Marilyn Freeman, RHIA, California Area HIM Consultant
- Steve Viramontes, RN, California Area CAC

3.6 Cherokee Nation Health Services, Oklahoma

- Jamie Tapp, PharmD, Pharmacy Information Technology Analyst
- Jason Loepp, RHIA, HIM Director
- Lisa Lyon, BSN, RN, CDE, Clinical Informatics Coordinator
- Toni Potts, BBA, Clinical Applications Coordinator Manager

3.7 Nashville Area Office, Tennessee

- Chris Lamer, PharmD, MHS, BCPS, OIT Meaningful Use Federal Lead (A)
- Deborah Burkybile, MSN, RN, CPC, OIT & USET EHR Deployment Specialist
- Robin Bartlett, PharmD, NCPS, Nashville Area Clinical Applications Coordinator
- Sheila Odom, Poarch Creek Health Department Clinical Applications Coordinator

3.8 Navajo Area Office, Arizona

- Beverly Becenti, RHIT, Navajo Area HIM Consultant
- Donna Nicholls, Meaningful Use Consultant, DNC Contractor
- Michael Belgarde, Navajo Area, Chief Information Officer, Acting Clinical Applications Coordinator
- Renetta Yellowhair-Francisco, Gallup Indian Medical Center, Acting HIM Clinical Applications Coordinator

3.9 Oklahoma Area Office, Oklahoma City

- Amy Rubin, PharmD, Oklahoma City Area Clinical Applications Coordinator
- Angela Kihega, RHIT, Oklahoma City Area HIM Consultant
- Cynthia Baldrige, RHIT, CCS-P, Claremore Indian Hospital, Coder
- Peggy Shults, RHIA, Claremore Indian Hospital Assistant, HIM Director
- Rebecca Johnson, RHIT, Clinton Service Unit Clinical Applications Coordinator
- Robin Thompson, MS, APRN, CNS, Oklahoma City Area Clinical Applications Coordinator
- Shawna Longhorn, CPC, Haskell Indian Health Center, Coder

3.10 Phoenix Area Office, Arizona

- DaJuanna Bissonette, RHIT, CPC, Phoenix Area HIM Consultant

- Elvira Mosely, MSHS, BSN, RN, Phoenix Area Clinical Applications Coordinator
- Janice Chase, RHIT, Acting HIM National Lead, OIT Practice Management
- Kathy Nelson, CPC, Parker Indian Hospital HIM & Business Office
- Maria Strom, RHIT, Phoenix Area Medical Records Administrator Specialist
- Pat Gowan, MPA, RHIA, CPC, USET REC HIM Meaningful Use Consultant

3.11 Phoenix Area Office, Reno

- Anna Wilson, CPC, Phoenix Area Clinical Applications Coordinator
- Ruth Hawkins, RHIT, Southern Bands Health Center, HIM Supervisor

3.12 Portland Area Office, Oregon

- Cornelius Dial, BS, RPh, Portland Area Clinical Applications Coordinator
- Katie Johnson, PharmD, NPAIHB, EHR Integrated Care Coordinator
- Roney Won, Portland Area Clinical Applications Coordinator

3.13 Tucson Area Office, Arizona

- Kelly Stewart, RHIA, Tucson Area HIM Consultant
- Trista Eggers, Tucson Area Clinical Applications Coordinator

4.0 Detailed Agenda

All times are Mountain Time!

Monday		
Start	Topic	TAB#
12:30	Set up, Check in	
1:00	Welcome & Introductions of course At the end of this session participants should be able to: Discuss & Review Training Materials Identify Needs & Expectations Demonstrate Ability to Access the RPMS EHR Training Database	
1:30	Overview of Stage 1 & 2 Meaningful Use for HIM Professionals At the end of this session participants should be able to: 1. Demonstrate familiarity with CMS EHR Incentive Program 2. Understand the difference between Core and Menu Set Measures 3. Understand difference between Performance Measures and Clinical Quality Measures 4. Understand the role of HIM professionals in meeting the Performance Measures.	Tab 3
2:00	Meaningful Use and Beyond (Pat and Angela to review her slides and identify content for this session) 1. Understand Meaningful Use policies and procedures for HIM staff.	
3:00	Break	
3:15	Meaningful Use and Beyond (continued) 1. Understand Meaningful Use policies and procedures for HIM staff.	
4:15	Meaningful Use Reports At the end of this session participants should be able to: 1. Generate & Review MU Performance Measure Report 2. Generate & Review Clinical Quality Measure Report 3. Generate a Patient List through the Performance Measure Report	Tab 04
4:45	Wrap Up & Adjourn	

Tuesday		
Start	Topic	TAB#
8:00	Set Up, Check-in	
8:30	<p>PCC Coding Queue</p> <p>At the end of this session participants will be able to:</p> <ol style="list-style-type: none"> 1. Understand Sorting Options within the Coding Queue 2. Manage Potential Merges through the Coding Queue 3. Manage the Coding Queue to Maintain Timely, Accurate, and Complete Health Records 4. Understand the RPMS Conventions and Commands for the Coding Queue 5. Update EHR Coding Audit Site Parameters 6. Auto-Complete Pharmacy Education Only Visits 	TAB 05
10:30	Break	
10:45	<p>PCC Management & Error Reports</p> <p>At the end of this session participants will be able to:</p> <ol style="list-style-type: none"> 1. Manage Visits with a Zero Dependent Entry Count 2. Manage the Orphan Visits with No Primary Provider and/or POV 3. Manage the Data Transmission Transaction Errors 4. Manage the Inpatient Visit Review Report 5. Understand Other PCC Management Reports 	TAB 06
11:45	Lunch	
1:00	<p>Paperless Refill - Uncoded Diagnosis</p> <p>At the end of this session participants will be able to:</p> <ol style="list-style-type: none"> 1. Review the Process for Paperless Refill from the Pharmacist's Perspective. 2. Compare and Contrast .9999 and 999.9 ICD-9 Codes as They Apply to Paperless Refill. 3. Fix UNCODED ICD9 Diagnoses for Paperless Refill 4. Review and Complete Paperless Refills Using the EHR Coding Queue by Clinic Code 5. Understand the Significance of 12:00 and 13:00 Pharmacy Visits. 6. Understand the Use and Sequencing of the V-Code and Diagnosis Code (POV) 	TAB 07
01:30	<p>Release of Information (ROI) – include “hands on” portion following presentation</p> <p>At the end of this session participants will be able to:</p> <ol style="list-style-type: none"> 1. Add a New and Edit a Disclosure Record 2. Enter Disclosure Documentation 3. Compare and Contrast ROI Reports Used in Managing Release of Information 4. Discuss Significance of Documenting Electronic Requests and Releases 5. Create an Electronic Copy of Health Information 6. Manage Requesting and Receiving Parties 	TAB 08

Tuesday		
Start	Topic	TAB#
02:30	Break	
2:45	<p>Sensitive Patient Tracking</p> <p>At the end of this session participants will be able to:</p> <ol style="list-style-type: none"> 1. Update Security Parameters to Track All Patients 2. Generate Sensitive Patient Tracking Reports by Patient, User, or Both 3. Enter/Edit Patient Security Level 4. List Sensitive Patients 	TAB 09
03:45	<p>TIU Note Management</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Create, Change, and Inactivate a Note Title 2. Reassign a Patient Note to the Correct Date of Service 3. Retract a Note 4. Hands On 	TAB 10
04:15 1 hour	<p>Documentation Best Practices</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Creation and Management of a User Note Title Matrix 2. Monitor Late Entries 3. Review the Use of Addendums 4. Print Notes and other Patient Health Information 5. Compare and Contrast Proper Use of the "CWADF" <p>Correct Errors</p>	TAB 11
5:00	Adjourn	

Wednesday		
Start	Topic	TAB#
08:00	Set up, Check-in	

08:30	<p>RPMS User Class Management –</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Assign of User Class 2. Configure Cosigners 3. Create and Manage Business Rules 4. Compare and Contrast the Utilization of Cosigner versus Additional Signer 5. Hands On 	TAB 12
09:30 2 Hours	<p>TIU Management</p> <p>At the end of this session participants should be able to utilize the TIU Reports menu to:</p> <ol style="list-style-type: none"> 1. Manage Unsigned and Un-cosigned Notes 2. Identify Missing Text & Clean up 3. Identify Reassignment of Documents 4. List Active Document Titles 5. Identify Reassigned Note Titles 6. Manage Electronically Filed Transcriptions 7. Hands On (Reports) 	TAB 13
10:30	Break	
10:45	<p>TIU Management (continuation)–</p> <p>At the end of this session participants should be able to utilize the TIU Reports menu to:</p> <ol style="list-style-type: none"> 8. Manage Unsigned and Un-cosigned Notes 9. Identify Missing Text & Clean up 10. Identify Reassignment of Documents 11. List Active Document Titles 12. Identify Reassigned Note Title 13. Manage Electronically Filed Transcriptions 14. Hands On (Reports) 	
11:45	Lunch	
1:00	<p>TIU Management - Templates</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Evaluate Accrediting Organizations Standards and ISO 9000 Requirements for Document Management 2. Discuss the Use of TIU Personal Templates 	TAB 14
1:15	<p>CPRS - Reports and Nature of Order</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Generate Unsigned Orders Search 2. Discuss the HIM Role in Searching for Unsigned Orders. 3. Compare and Contrast the use of Written, Policy, Verbal, and Telephone “Nature of Order”. 	TAB 15

1:45	<p>Personal Health Record (PHR)</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Understand Purpose and Importance of PHR in the Indian Health Care System 2. Examine the role of HIM in Registrar Functions 3. Summarize PHR Dependencies on other RPMS Applications. 	TAB 16
02:45	<p>Patient Merge</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Recognize the Necessary Sequence and Relationship of MPI, C32, and HIE 2. Delineate Steps for Printing a List of Potential Merges 3. Verify Potential Duplicates 4. Merge Valid Duplicates 5. Give Demonstration of Patient Merge <p>UNDERSTAND THAT THERE IS NO UNMERGE!!!</p>	Tab 17
3:00	Break	
03:15	<p>Patient Flags</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Compare and Contrast the Use of Patient Flags 2. Examine Policy and Guidelines for Patient Flags 3. Identify HIM Roles and Responsibilities for Management of Patient Flags 4. Create a Patient Flag 5. Generate Reports for Managing Patient Flags 6. Hands On 	TAB 18
04:15	<p>VistA Imaging</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Examine Policy and Guidelines for Vista Imaging 2. Review Processes for Scanning Documents 3. Perform Quality Checks and Correct Errors 	TAB 19
5:00	Adjourn	

Thursday		
Start	Topic	TAB#
08:00	Set Up, Check-in	

08:30	<p>Alerts & Notification Management - include hands on</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Compare and Contrast Alerts and Notifications 2. Generate VUA Lists to Manage Users Notifications 3. Schedule Notifications 4. Erase Notifications 5. Review Utilization of and Assignment of Surrogates 6. Review the Utilization of Alert Management Menus 7. Hands On 	TAB 20
9:30	<p>Pick Lists</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Create and Maintain Diagnostic Pick Lists 2. Create and Maintain Procedural Pick Lists 3. Assign Associations to Procedural Pick Lists 4. Hands On 	TAB 21
10:30	Break	
10:45	<p>MPI and HIE</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Understand the Purpose and Uses of the MPI and HIE 2. Understand HIM's role in these functions 	TAB 22
11:45	Lunch	
1:00	<p>ICD-10</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Understand the Creation and History of ICD-10-CM and ICD-10 PCS 2. Understand the Impact of ICD-10 on Current Processes 3. Discuss Plan for Implementation of ICD-10 Throughout Indian Health System 	TAB 23
1:30	<p>SNOMED use and RPMS created Problem lists</p> <p>At the end of this session participants should be able to:</p> <ol style="list-style-type: none"> 1. Understand the Creation and History of the Systematized Nomenclature of Medicine – Clinical Terms (SNOMED-CT) 2. Understand the Impact of SNOMED-CT Current Processes 3. Discuss Plan for Implementation of SNOMED-CT Throughout RPMS Suite of Applications 4. Discuss Plan for the new Integrated Problem List to support SNOMED-CT, ICD-10 and Meaningful Use 2014 implementation 	TAB 24
2:30	Break	

02:45	EHR & MU Scavenger Hunt At the end of this session participants should be able to: <ol style="list-style-type: none">1. Document MU Performance Measures within the Correct EHR Component2. Identify Locations for Documenting Required MU Data Elements3. Compare and Contrast Accessing Data using EHR vs. RPMS	TAB 25
03:45	Survey Monkey Evaluation and AAPC Continuing Education Certificate (need to contact Deanna Dennis for CE's)	TAB 26
4:00	Wrap up & Adjourn	

5.0 Recognition and Thanks

The Indian Health Service (IHS) Office of Information Technology (OIT) National Electronic Health Record (EHR) Training and Deployment Program and Health Information Management (HIM) Consultants workgroup worked diligently to prepare the necessary deployment and training documents to facilitate the deployment of EHR. We hope that you find both the training and training documents helpful.

The Office of Information Technology conveys its sincere thanks to all the members and guests of this workgroup. They spent long hours preparing and updating these documents and even longer documenting their experience; they deserve our appreciation. Without these dedicated workgroup members this “EHR & MU for Health Information Management” hands-on course would not be possible.