

THE INDIAN HEALTH SERVICE

Business Rules



Superior Health Information Management
Now and for the Future

Template Creation

- Discuss structure and use of business rule and user classes.
- Compare and contrast specific business rules for Behavioral Health Tier I and Tier II notes (sensitive records).
- Review option to allow Behavioral Health TIU notes to pass to BHS Version 4.0.
- Exercise 3: Review and/or create specialized business rules.

Anatomy of a Business Rule

- Document (Class) for which the rule is written
- Status of the document:
 - Completed, Unsigned, or Uncosigned
- The action that is occurring:
 - View, Print, Sign, or Edit
- The user class
- The user role (Expected Signer)

Example: *A Completed Progress Note may be Viewed by a User.*

More Examples

- An *Unsigned* (Document Class) Tier I BH All Provider may be *Viewed* by *Author/Dictator* (role)
- A *Completed* (Document Class) Tier I BH All Provider may be *Viewed* by *Physician* (user class)

Understanding Rules

- Rule are exclusive.
- When you assign a rule to a user class or a role, they are the **ONLY** ones who can do the action in the rule.
- You often need to do multiple rules to include medical records and other groups who also need to be able to do the action.

Examples

- An *Unsigned* (Document Class) Tier I BH All Provider may be *Printed* by *Chief, MIS*.
- An *Unsigned* (Document Class) Tier I BH All Provider may be *Edited* by an *Author/Dictator*.
- A *Completed* (Document Class) Tier I BH All Provider may be *Viewed* by a *Nurse*.

Adding a Rule

```
Select DOCUMENT DEFINITION: TIER I BH ALL PROVIDER//  
      2   TIER 1           DOCUMENT CLASS     DOCUMENT  
CLASS DOCUMENT CLASS  
DOCUMENT DEFINITION: TIER I BH ALL PROVIDER//  
STATUS: COMPLETED  
ACTION: VIEW  
USER CLASS: PHARMACIST
```

Result:

```
An COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER  
may BE VIEWED by a PHARMACIST
```

Deleting Rule

```
Select Action: Quit// del      Delete Rule
Select Business Rule(s):  (14-25): 14
```

Deleting #14

Removing the rule:

```
An COMPLETED (DOCUMENT CLASS) TIER I BH
ALL PROVIDER may BE VIEWED by a PHARMACIST
```

Are you SURE? NO// Y

Compare and Contrast TIER I and TIER II Business rules

- *A Completed (Document Class) Tier II BH Only BH Provider may be Printed by a Behavioral Health.*
- *A Completed (Document Class) Tier I BH All Provider may be Viewed by a Physician.*

Bad Rule

- *An Unsigned (Title) Behavioral Health I may be Viewed by a User.*
- *An Unsigned (Title) Behavioral Health I may be Edited by a User.*
- *A Completed (Document Class) Tier II BH only may be Viewed by a User.*

Think before Creating new rules

- What am I trying to accomplish?
- Rationale behind the rule:
 - What standard of care, rule, or regulation is backing my rule?
- Did you consult with the Health Information Manager (custodian of a legal medical record) before creating the rule?
- If you do not know what you are doing, **DO NOT TOUCH BUSINESS RULES**. Ask for help.

EHR Visits and BHS

- The Behavioral Health System (BHS) can be configured pull across EHR visits and their notes.
- The EHR visit will pass to PCC and then on to the AMH (BHS) database if the visit was created using one of the BH Clinic Codes.
- The EHR visit will also pass to PCC and AMH if any of the providers on the visit (primary or secondary) are included in the list of BH providers in the BH PROVIDER CLASS CODE data dictionary.

EHR Visits and BHS cont.

- Notes and addenda displayed in BHS follow the TIU Business Rules.
- EHR visits cannot be deleted in BHS and only certain fields can be edited.
- Unsigned EHR notes cannot be signed in BHS and must be signed in EHR.

Configuration for Passing EHR Visits to BHS

- A Site Parameter must be set in BHS to turn on the link between EHR and BHS.
- In order for a visit to cross from EHR to BHS it must include an Activity Time:
 - Sites that are going to pass visits to BHS must add the Activity Time component to the user interface.



Questions?