



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

CMET User Manual

Version 2.4
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Preface

The purpose of this manual is to provide the information needed to use the latest enhancements to the CMET functionality available in the iCare (BQI) population management application.

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

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

- iCare – IHS OIT
Available at <http://www.ihs.gov/icare/>
- iCare Population Management GUI, User Manual Version 2.2 (July 2011)
available at http://www.ihs.gov/RPMS/PackageDocs/bqi/bqi_022u.pdf
- iCare Training available at
http://www.ihs.gov/icare/index.cfm?module=dsp_icare_cmet_training
Recorded AdobeConnect sessions for iCare available at
<https://ihs.adobeconnect.com/r6yazmoz1gm>
- Join the iCare listserv by sending an e-mail to icare@listserv.ihs.gov

1.0 Introduction

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

For more information about iCare basic functionality, iCare usage, or training for iCare, you can consult the resources listed above in the Preface.

1.1 Background

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

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

1.2 iCare Graphical User Interface

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

iCare can help IHS providers by:

- Proactively identifying and managing different groups (populations) of patients who share user-defined characteristics.
- Providing an integrated view of a patient's conditions that would minimize "stove piped" care management.

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

1.3 Who Should Use iCare?

Any provider who needs to identify a group of patients for long-term management or to create a temporary list should think about using iCare. Do you fit any of the following scenarios?

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

1.4 Features Introduced in Version 2.4

iCare Version 2.4 is composed of three different builds/packages:

- ICARE MANAGEMENT SYSTEM 2.4
- CARE MANAGEMENT EVENT TRACKING 1.1
- HIV MANAGEMENT SYSTEM 2.2

The majority of changes in this release are to update the three parts of iCare to incorporate ICD-10.

1.4.1 ICD-10 Updates

1.4.1.1 Update Glossaries and Help Files

The iCare application displays several glossaries, listed below, to describe and document the criteria used by the nightly and weekly jobs to perform the data analysis for the various data displayed in iCare. The displays are dependent on taxonomies and therefore, the taxonomy updates documented above will require the following glossaries to reflect those changes.

- Best Practice Prompts Glossary
- Care Management - Asthma Glossary
- Care Management – COPD
- Care Management - Diabetes
- Care Management – HIV/AIDS Glossary
- Community Alerts Glossary
- Diagnostic Tags Glossary
- IPC Glossary
- iCare Online Help

1.4.1.2 Community Alerts Update

The iCare application displays Community Alerts which are identified by the nightly background jobs. The Community Alerts criteria depend on new and updated taxonomies. The ICD-10 conversion will require that the Community Alerts logic be validated with the updated taxonomies and the documentation of the logic visible in iCare via glossary and help to reflect those changes. For those Community Alerts without an associated taxonomy, a new taxonomy will be created with both ICD-9 and ICD-10 codes rather than relying on checking individual codes.

1.4.1.3 Diagnostic Tags Update

The iCare application displays Diagnostic Tags which are identified by the nightly and weekly background jobs. The Diagnostic Tag criteria depend on taxonomies updated to include ICD-10 codes. The ICD-10 conversion will require that the Diagnostic Tag logic be validated with the updated taxonomies and the documentation of the logic visible in iCare via glossary and help will need to reflect those changes. Diagnostic Tags update will affect Diagnostic Tag views in panels and patient records.

1.4.1.4 Family History Update

The iCare application displays Family History data in the Patient Record. The ability to add/edit/delete Family History conditions has been disabled.

1.4.1.5 Problem List Update

The iCare application displays Problem List data in the Patient Record. The ability to add/edit/delete Problems has been disabled.

1.4.1.6 PCC Procedures Update

The iCare application displays PCC Procedure data in the Patient Record. PCC Procedures include a field for a procedure code based on the ICD-9 procedure code set. The ICD-10 conversion will require an update to the display of the PCC procedure in iCare be updated to show the appropriate ICD code.

1.4.1.7 Taxonomy Update

The iCare application displays taxonomies and their respective entries. A new way of displaying taxonomies has been implemented. The ICD-10 conversion will require that the display of taxonomy entries be updated to allow for ICD-10 codes to be included. This will include a new column indicating which code is ICD-9 and which code is ICD-10.

Additionally, the dialog will be updated to improve usability and display other associated fields like matches at your facility to the associated LOINC code and NDC code.

Further, the ability to view the SNOMED subsets defined for IPL will be included.

1.4.2 Non ICD-10 Updates

1.4.2.1 Patient Demographics

Two new fields were added to Patient demographics list:

- Last Immunization Notification
- Last Reminder Notification

This will list the last notification created for the patient.

1.4.2.2 Care Mgmt Group

A new Care Mgmt Group has been added for Prenatal patient care. It is composed of the following columns:

- Currently Pregnant? - Marked as “yes” in the Reproductive factors file
- Estimated Delivery Date - The definitive EDD from Reproductive Factors
- Estimated Gestational Age - The EGA measurement from V Measurement
- High Risk - If the patient has any active prenatal problems that are marked as high priority, show the provider narrative(s).

Additionally, a new lab test taxonomy was created called BQI PRENATAL TAX. You may populate this taxonomy with the lab tests that you want to see for your prenatal population. Each lab test will display as a column and show the RESULT (DATE).

Note: After updating this taxonomy, the iCare Nightly Job must run to do the update.

2.0 Orientation

This section provides an overall look at the design and functions of the main screen elements of the iCare interface.

The core concept of iCare is the patient panel. This panel is a list of patients that the user has defined, either manually by selecting individual patients or by using automated search definitions.

2.1 iCare Windows Overview

The iCare main window will display the namespace and RPMS Server Address. This aids those large sites with multiple servers. The user can quickly review what server and namespace are being accessed.



Figure 2-1: Sample namespace and RPMS server address information

2.1.1 iCare Main Window

The iCare Main window contains two lists, which can be displayed on separate tabs or viewed on a split screen as well as the following: **Community Alerts, National Measures, CMET, Meaningful Use, and IPC.**

2.1.1.1 About the Panel List

The **Panel List** is displayed in columnar format. It contains a list of all the panels that have been defined by you or that have been shared with you by another user.

 A screenshot of the "Panel List" window in the iCare application. The window has a menu bar with options: New, Open, Delete, Repopulate, Modify, Share, Copy, and Category. Below the menu bar is a table with the following columns: Category, Panel Name, Panel Description, # of Pts, Last Updated, Last Updated By, and Owner. The table contains five rows of data.

Category	Panel Name	Panel Description	# of Pts	Last Updated	Last Updated By	Owner
	afternoon pts		572	Feb 29, 2012 01:34 PM		
	Asthma pts in AM		338	May 13, 2010 11:49 AM		
	BH Afternoon pts	Pts with abnormal test results	1,497	Apr 14, 2011 03:59 PM		
	bhs people		1,033	Apr 14, 2011 05:11 PM		
	HIV/AIDS pts in PM		281	Feb 26, 2013 09:54 AM		

Figure 2-2: Sample Panel List

2.1.1.2 About the Flag List

The **Flag List** is displayed in columnar format. It displays flags for any patient on any of the panels in the **Panel List**, including shared panels.

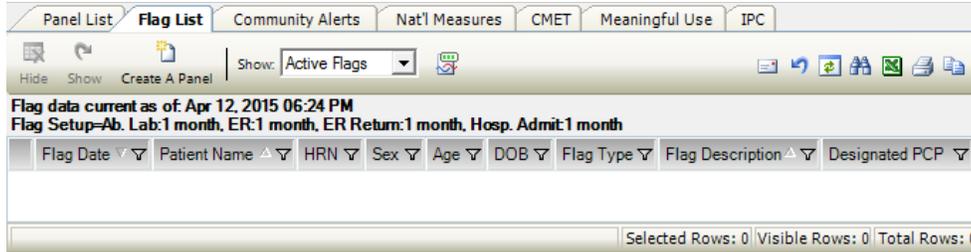


Figure 2-3: Sample Flag List

2.1.1.3 About Community Alerts

The **Community Alerts** view is displayed in columnar format. It contains alerts associated with the patient’s Community of Residence (COR).

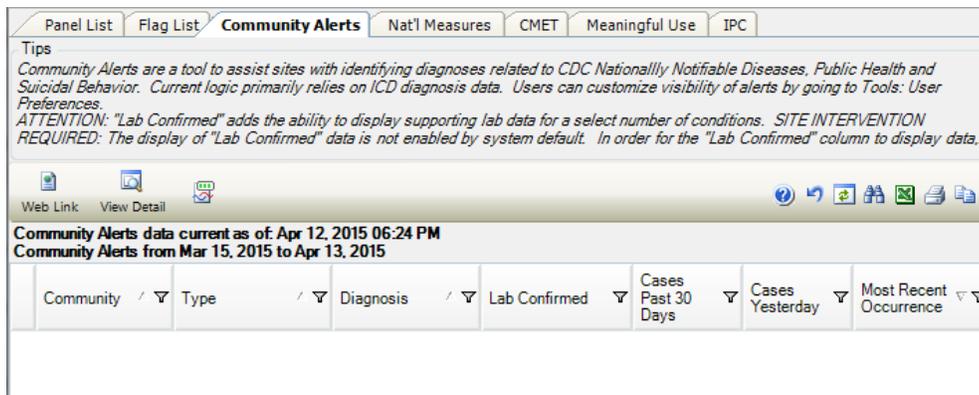


Figure 2-4: Sample Community Alerts View

2.1.1.4 About National Measures

The **Nat'l Measures** tab displays IHS national clinical performance measure as defined and reported in the RPMS Clinical Reporting System (CRS). iCare uses CRS performance logic to display whether the patients in the facility are meeting annual performance goals.

Category	Clinical Group	Measure Name	# Patients in Denominator	# Patients in Numerator	% Met	2015 Goal	IHS Current National Performance	Healthy People 2020 Goals	
Developmental	Behavioral Health	Alcohol Screen: 12-75 (Dev)	5,648	0	0.0%				
		Alcohol Screen: Females 15-44 (Dev)	1,912	0	0.0%				
		Alcohol Screen: Positive: 12-75 (Dev)	0	0					
		Alcohol Screen: Positive: Females 15-44 (Dev)	0	0					
		Depression Screening, Diagnosis or Suicide Ideation: 12-18 (Dev)	1,050	11	1.0%				
		Depression Screening, Diagnosis or Suicide Ideation: 18+ (Dev)	5,035	19	0.4%				
	Cancer-Related	Comprehensive Cancer Screening (Dev)	2,922	422	14.4%				
		Hepatitis C Screening	1,547	293	18.9%				
	National GPRA	Behavioral Health	Weight Assessment & Counseling (3-17)	1,334	1	0.1%			
			Weight Assessment & Counseling (3-17): BMI	1,934	9	0.5%			
			Weight Assessment & Counseling (3-17): Nutrition	1,934	5	0.3%			
			Weight Assessment & Counseling (3-17): Physical Activity	1,934	2	0.1%			
STI: HIV Screen: 13-64 (Dev)			4,966	7	0.1%				
STI: HIV Screens: Count (Dev)				16					
Alcohol Screen Females 15-44			1,787	0	0.0%	66.7%	66.0%	N/A	
Depression: Diagnosis Only 18+			5,035	2	0.0%				
Depression: Screening Only 18+			5,035	14	0.3%	64.3%	66.0%	N/A	
Depression: Screening or Diagnosis 18+			5,035	14	0.3%				
IPV/DV Screen Females 15-40	1,632	0	0.0%	61.6%	63.5%	N/A			

Figure 2-5: Nat'l Measures window

2.1.1.5 About CMET

The CMET view is displayed in three sub-tabs: **Events**, **Tracked Events**, and **Follow-up Events**.

Category	Patient Name	HRN	Sex	Age	DOB	Designated PCP	Community	Active DX Tags	Event Name
CERVICAL	CQM.YOUNGFORTYFIVE MARY	454598-TST	F	17 YRS	Apr 02, 1998		CHIPPEWA FALLS		PAP SMEAR
	CQM.YOUNGFORTYSEVEN NANCY	498375-TST	F	17 YRS	Dec 30, 1997		FLANDREAU		PAP SMEAR
	CQM.YOUNGFORTYSEVEN MARTH	552173-TST	F	24 YRS	May 26, 1990		MUSKOGEE		PAP SMEAR
SKELETAL	DEMO.FERN	142601-TST 142602	M	55 YRS	Jan 01, 1960		RIVERSIDE	CVD ASR (P); DM (A)	PAP SMEAR
	CQM.OVERHUNDREDDTEN	84138-TST	M	30 YRS	Aug 13, 1984		O'NEILL		OSTEOPOROSIS SCR
STI	CQM.YOUNGFIFTYEIGHT SACEJAWIA	324119-TST	F	25 YRS	Dec 11, 1989		NEZ PERCE		CHLAMYDIA SCREEN
	CQM.YOUNGFIFTYEIGHT VE RAINA	192837-TST	F	17 YRS	Dec 08, 1997		MENOMINEE		CHLAMYDIA SCREEN
	CQM.YOUNGFIFTYEIGHT OUR QUALHA	18791-TST	F	18 YRS	Dec 07, 1996		MICCOSUKEE		CHLAMYDIA SCREEN
	CQM.YOUNGFIFTYEIGHT HREE PANYA	194374-TST	F	19 YRS	Dec 06, 1995		OMAHA		CHLAMYDIA SCREEN
	CQM.YOUNGFIFTYEIGHT OMA	638478-TST	F	22 YRS	Dec 03, 1992		MANDAN*		CHLAMYDIA SCREEN
	CQM.YOUNGFORTYEIGHT NORA	238745-TST	F	24 YRS	Dec 01, 1990		NAVAJO MOUNTAIN-AZ		CHLAMYDIA SCREEN
	CQM.YOUNGFORTYEIGHT	887123-TST	F	20 YRS	Sep 21, 1994		COEUR D'ALENE		CHLAMYDIA SCREEN

Figure 2-6: Sample CMET view

2.1.1.6 About Meaningful Use

The **Meaningful Use** tab provides information about the Meaningful Use objectives and measures for providers as well as hospitals/CAHs. The Meaningful Use team has developed logic related to Meaningful Use objectives and clinical quality measures. This logic is utilized to perform periodic iCare background jobs to obtain related data for display.

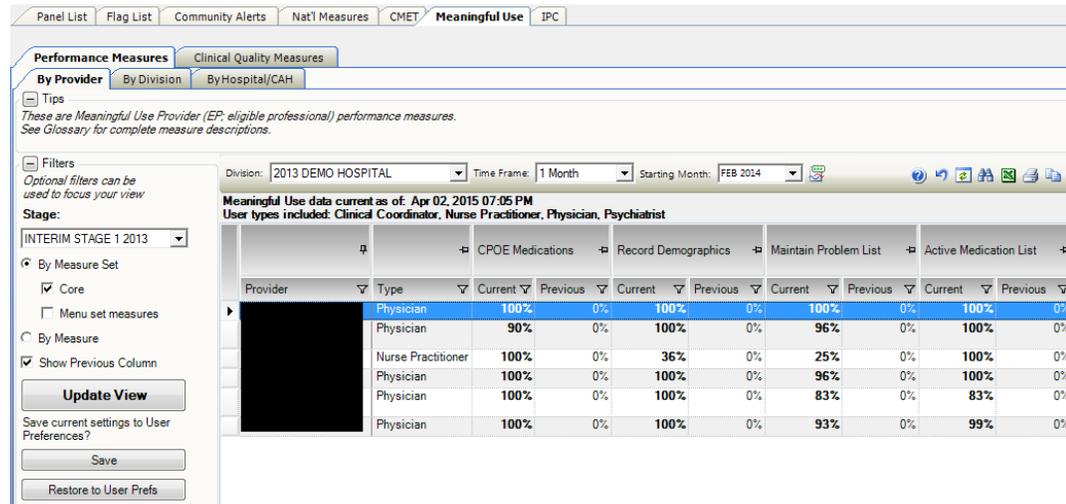


Figure 2-7: Sample Meaningful Use view

2.1.1.7 About IPC

The IPC view is displayed on several sub-tabs: **Patient Detail**, **Panel Detail**, **Provider Aggregated**, and **Facility Aggregated**.

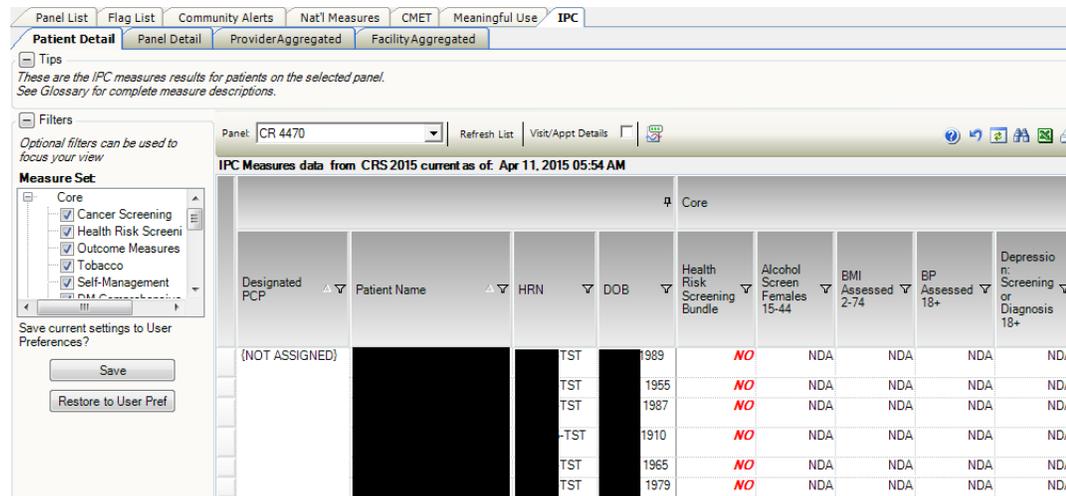


Figure 2-8: Sample IPC view

2.1.2 About the iCare Panel View Window

The **Panel View** displays a list of the patients in a particular panel.

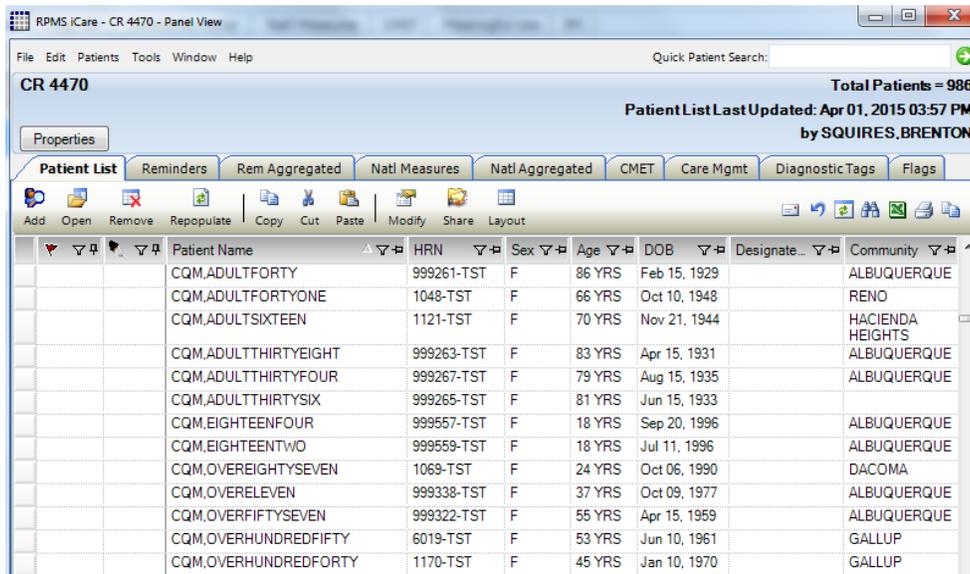


Figure 2-9: Sample Panel View window

2.1.3 About the iCare Patient Record Window

The Patient Record window displays information about the selected patient from data stored in the RPMS database.

The screenshot shows the iCare Patient Record window for a female patient named DEMO.CDSADULT FEMALE. The window is divided into several sections:

- Demographics:** Name: DEMO.CDSADULT FEMALE, HRNs: 999998-TST, Community: TOPPENISH CY, Address: 1 Main Street, Toppenish, WASHINGTON 98948, SSN: XXX-XX-2565, Sex: F, Age: 50 YRS, DOB: Mar 25, 1965, Phone, Work Ph., Alt. Phone, Email, and DPCP fields are also present.
- Allergies:** A list containing ASPIRIN.
- Barriers to Learning:** A section for recording barriers to learning.
- Cover Sheet:** A section for tracking recent visits, scheduled appointments, and providers. It includes a dropdown menu for the time period (set to 1 month) and a table with columns for Date, Provider Narrative, and Clinic.
- Insurance:** A section for tracking insurance coverage, including a dropdown menu for the time period (set to 1 month) and a table with columns for Insurance Coverage and Effective Date.
- Panels:** A section for tracking patient panels, including an "Add to Panel" button and a table with columns for Panel Name and Owner. A panel named "DEMO Patient Panel" is listed.
- Registers:** A section for tracking patient registers, including a table with columns for Title, Status, and Creator. A register titled "ACM: IHS DIABETES" with a status of "ACTIVE" is listed.

Figure 2-10: Sample Patient Record window

2.2 Key iCare Concepts

This section discusses diagnostic tags, taxonomies, and national performance measures.

2.2.1 Diagnostic Tags

iCare provides a diagnostic tagging function that runs as a background process on your RPMS server and reviews all patient data. Tagging is a term that refers to running a series of logic algorithms on one or multiple patients that identifies (“tags”) them with one or more predefined diagnostic categories, listed below.

- Asthma
- COPD
- Cardiovascular Disease (CVD) Known (CVD Kn)
- CVD At Highest Risk (CVD AHR)
- CVD At Significant Risk (CVD ASR)

- CVD At Risk (CVD AR)
- Diabetes (DM)
- HIV/AIDS (HIV)
- Hypertension (HTN)
- Obese
- Prediabetes/Metabolic Syndrome w/o DM (PreDM)
- Current Smokers (Smoker)
- Pregnancy

One patient might have multiple diagnostic categories, e.g., diabetes, asthma, and known cardiovascular disease (CVD). The overall purpose of the diagnostic “tag” is two-fold: (1) to enable iCare to quickly create a panel for a user based on the same categories and (2) to enable application of fully integrated healthcare reminders that reflect the prevention and treatment priorities for the full spectrum of a patient’s disease conditions.

2.2.2 Taxonomies

RPMS clinical applications, including the Diabetes Management System, the Clinical Reporting System, the PCC Health Maintenance Reminders, and iCare contain logic (artificial intelligence) statements that compare and calculate various types of patient data to arrive at a conclusion.

For example, in order for a Pap Smear Reminder to appear on the Health Summary, RPMS has to calculate the following about the patient:

- Is the patient a woman?
- If yes, does she fall into a certain age range?
- If yes, was a pap smear ever performed?
- If yes, what is the date of the most recent pap smear?
- If the most recent test is overdue, a reminder needs to appear

To produce results with comparable data across every facility, the clinical definition of a “pap smear” has been defined nationally. Clinical definitions use RPMS taxonomies to contain the various elements of a definition. As much clinical logic as possible is based on standard national codes, including ICD, CPT, LOINC, NDC, and national IHS standard code sets (e.g., Health Factors, patient education codes, etc.). For terminology that is not standardized across each facility, such as lab tests or medications, RPMS uses taxonomies that can be populated by each individual facility with its own codes.

For data elements like diagnoses, procedures, or lab tests identified by LOINC codes, the taxonomy simply identifies the standard codes that a software program should look for. These codes are hard-coded by the programmer into several *software-defined taxonomies* that are distributed with the RPMS software that uses those taxonomies. These taxonomies can only be updated by the software programmer at the direction of a national clinical logic review process.

Site-populated taxonomies are used to mitigate the variations in terminology for other types of data elements that vary from one facility to another, including medications and lab tests. This means, for example, that one site's Pap smear data can be compared to another site, even though the same term is not used for the Pap smear lab test. Or, one site's beta-blocker data can be compared to another site, even though the same names are not used for beta-blocker drugs.

For example, one site's Lab table might contain the term *Glucose Test* while another site's table might contain the term *Glucose* for the same test. PCC programs have no means for dealing with variations in spelling, spacing, and punctuation. Rather than attempting to find all potential spellings of a particular lab test, the application would look for a pre-defined taxonomy name that is installed at every facility. The *contents* of the taxonomy are determined by the facility. In this example, the application would use the "DM AUDIT GLUCOSE TESTS TAXONOMY." The individual facility will enter all varieties of spelling and punctuation for Glucose Tests used at that particular facility.

2.2.3 National Performance Measures

Performance assessment measures what an organization does and how well it does it. For a healthcare organization, such as the Indian Health Service, this means measuring how well we deliver healthcare services to our population, measured by documentable improvement in various standard health measures. Standardized clinical performance measures provide a systematic approach to health improvement for our organization. Results from performance assessment are used internally within the IHS, at national and local levels, to support and guide performance improvement in those clinical areas that need it.

Additionally, the Government Performance and Results Act (GPRA) requires federal agencies to report annually to Congress on how the agency measured up against the performance targets set in its annual plan. IHS GPRA measures include measures for clinical prevention and treatment, quality of care, infrastructure, and administrative efficiency functions. The RPMS Clinical Reporting System (CRS) is the reporting tool used by the IHS Office of Planning and Evaluation to collect and report clinical performance results annually to the Department of Health and Human Services (DHHS) and to Congress.

2.2.3.1 Clinical Reporting System (CRS)

The Clinical Reporting System (CRS) is an RPMS software application designed for national reporting as well as for local and area monitoring of clinical GPRA and developmental measures. CRS was first released for FY 2002 performance measures (as GPRA+) and is based on a design by the Aberdeen Area (GPRA2000).

Each year, an updated version of CRS software is released to reflect changes in the logic descriptions of the different denominators and numerators. Additional performance measures might also be added. Local facilities can run reports as often as they want to and can also use CRS to transmit data to their area. The Area Office can use CRS to produce an aggregated area report for either annual GPRA or Area Director Performance reports.

2.2.3.2 Performance Measures Displayed in iCare

iCare uses exactly the same logic as the Clinical Reporting System to display results for national performance measures. Results can be seen for either a panel of patients or an individual patient. iCare also displays aggregate national measures data for the site's active population for all National Measures.

2.2.4 Reminders Displayed in iCare

The Reminders view is similar to the National Measures view. The values in the individual reminders columns will be the due date of the test/procedure. Active reminders are reminders that are "turned on" at the site.

The patient panel has a separate Reminders Aggregate view that displays aggregate reminders performance data for the panel population for all national health maintenance reminders that are active at the site.

3.0 CMET

The **Care Management Event Tracking (CMET)** tab on the iCare main window provides information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs.

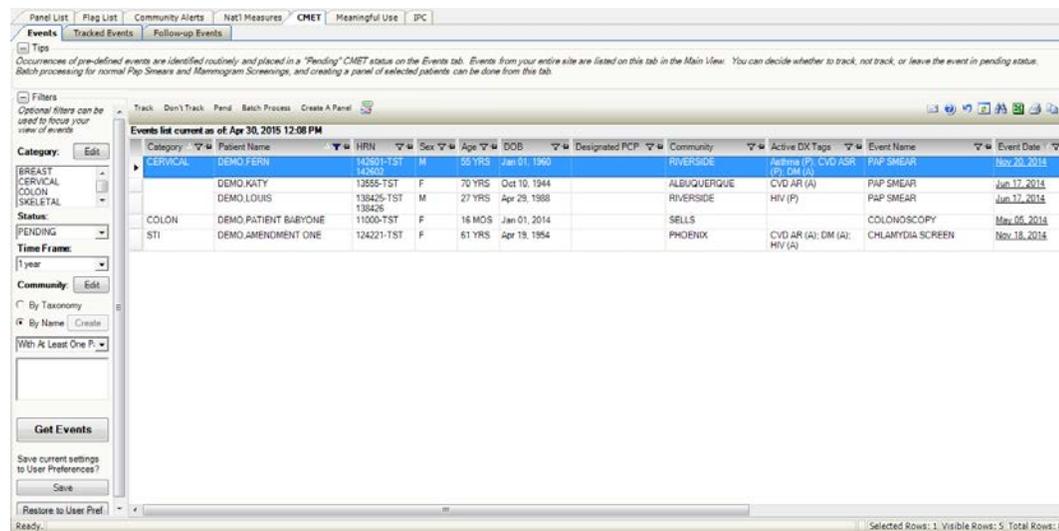


Figure 3-1: Sample **CMET** tab

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, Skeletal, STI.
- The events apply to female and male patients.

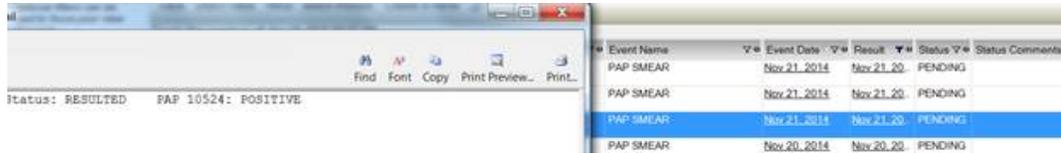
If two users are working on the same CMET record, the changes that are saved first will be applied. A message to the second user is provided: This record has just been updated. Do you want to refresh the entire list? Click **Yes** to refresh (otherwise, click **No**).

Consider the following information:

When using the **Startup View** tab of **User Preferences**, you select the startup view you would like to see when opening iCare. If you select the **CMET** radio button on **User Preferences**, there will be a secondary field. Use this secondary field to define the default sub-tab, for example, **Tracked Events**. If you select the **Layouts** tab on **User Preferences**, you can select the default template for the various CMET sub-tabs.

3.1 CMET Reminders Workflow

When events are mined via the iCare background job, they show up in the Pending queue, Events tab, for evaluation to determine if the event was positive or negative.



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 3-2: Sample Result detail and CMET Events tab row highlighted

An event with a negative result should be tracked in order to indicate that it has been reviewed, has been verified, the patient has been notified and a follow up procedure has been identified. For negative pap smears and mammograms, multiple events can be batch processed because there is a set follow-up – another pap or mammogram in a defined timeframe; e.g. 1 year, 2 years, etc.

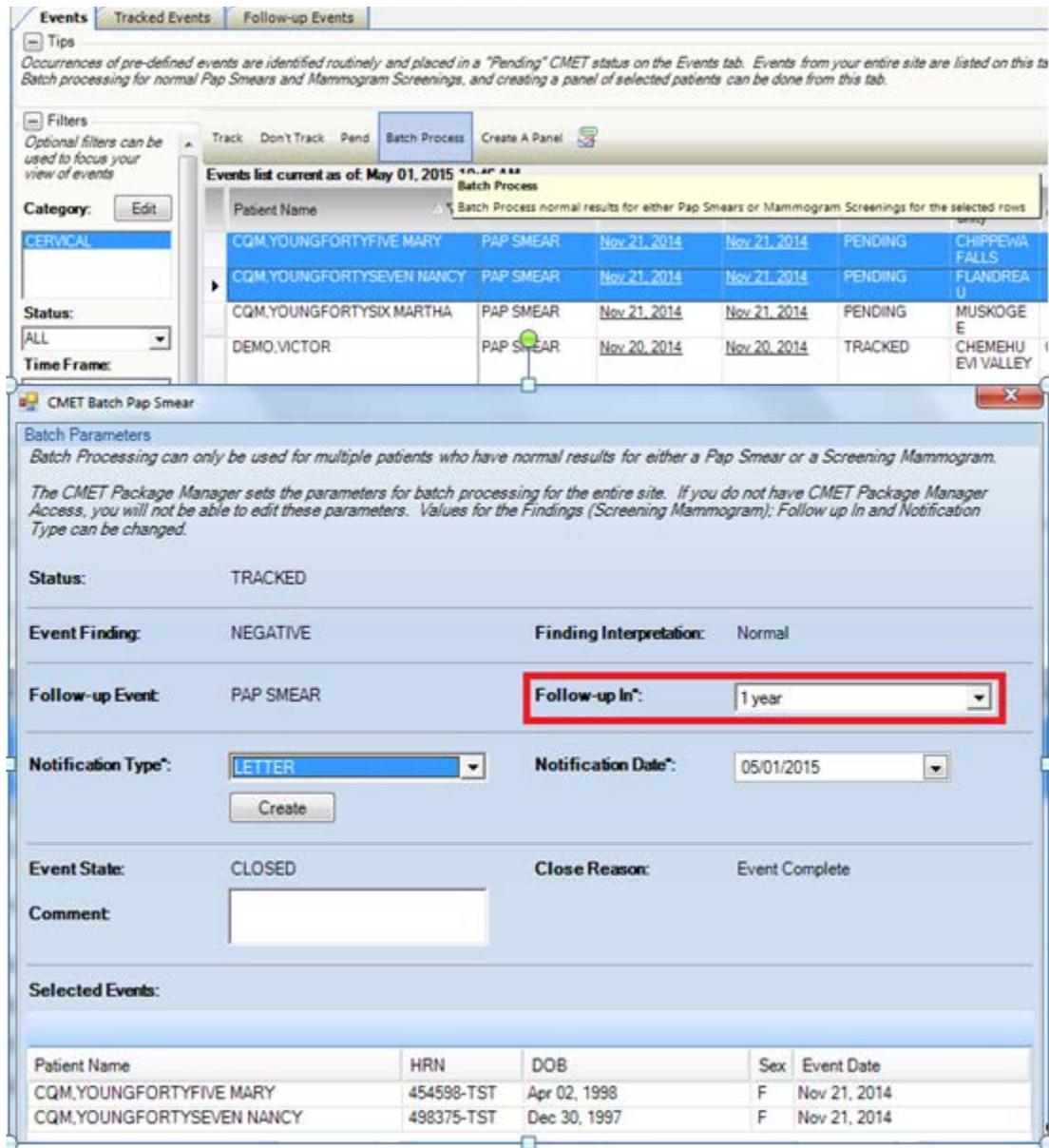


Figure 3-3: Sample multiple selection and Batch Process detail screens

Follow-up Events become CMET Reminders when the iCare Nightly 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

(by the recommendation(s) made for the follow-up of a "Traier management of your patients' CMET activity, create and

Open CMET Worksheet Create A Panel

Category	Follow-up Event Name	Follow-up Event Date
CERVICAL	PAP SMEAR	Jun 10, 2016
	PAP SMEAR	May 11, 2016
	PAP SMEAR	May 11, 2016
	PAP SMEAR	Mar 19, 2016
	PAP SMEAR	Nov 21, 2015
	PAP SMEAR	Nov 21, 2015
	PAP SMEAR	May 10, 2015
	PAP SMEAR	Nov 02, 2011
	PAP SMEAR	Oct 27, 2011
	PAP SMEAR	Mar 11, 2011

Figure 3-4: Sample CMET Follow-up Events view with overdue events

iCare users can then create an iCare panel based on the PAP SMEAR (CMET) reminder for upcoming or overdue reminders and follow the normal process for doing Reminder Notifications from the Panel View – Definition Details tab.

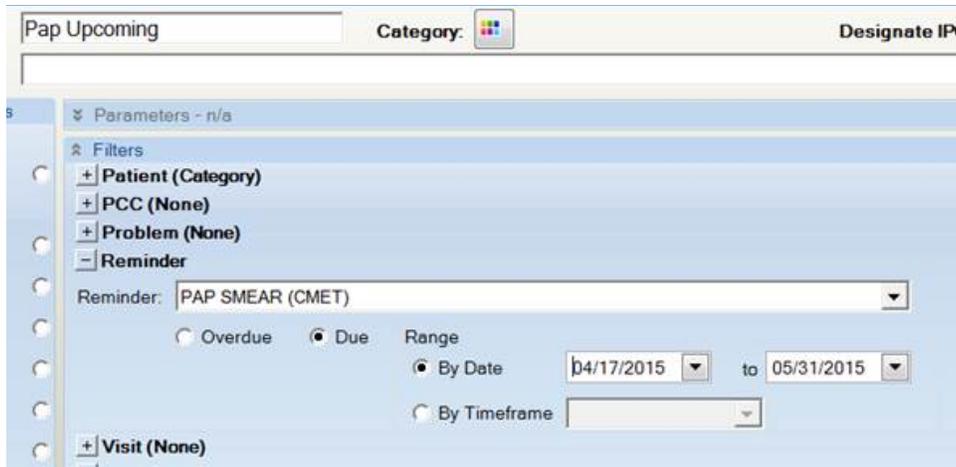


Figure 3-5: Sample Panel Definition Filter view with CMET Reminder due selected

4.0 CMET Layout

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

4.1 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, but you can limit this display by applying filters to your view. Filtering in this manner does not affect the routine background job.

The screenshot shows the 'Events' sub-tab interface. It includes a 'Filters' panel on the left with options for Category (BREAST, CERVICAL, COLON, SKELETAL), Status (PENDING), Time Frame (1 year), and Community (By Taxonomy, By Name). The main area displays a table of events with columns: Category, Patient Name, HRN, Sex, Age, and DOB. The table is filtered to show 'CERVICAL' events. The 'Events list current as of: Apr 30, 2015 12:08 PM'.

Category	Patient Name	HRN	Sex	Age	DOB
CERVICAL	DEMO.FERN	142601-TST 142602	M	55 YRS	Jan 01, 1960
	DEMO.KATY	13555-TST	F	70 YRS	Oct 10, 1944
	DEMO.LOUIS	138425-TST 138426	M	27 YRS	Apr 29, 1988
COLON	DEMO.PATIENT BABYONE	11000-TST	F	16 MOS	Jan 01, 2014
STI	DEMO.AMENDMENT ONE	124221-TST	F	61 YRS	Apr 19, 1954

Figure 4-1: Sample **Events** sub-tab

Events are procedures, screenings, and/or exams that have been pre-defined and categorized into Breast, Cervical, Colon, Skeletal, and STI. 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. Once “Tracked,” a CMET is established.

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

The Tips information provides an overview of the sub-tab. You can 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. You can collapse this area in order to have more room for viewing the events data.

Note: You can establish the default “collapse” status for the Tips and Filters areas on this sub-tab. To do that, select **Tools | User Preferences | CMET tab | Events sub-tab**. The checkboxes 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 are: Category, Status, Time Frame, and Community. Section 6.1 provides for more information about these filters.

You can (also) filter the columns on the **Events** sub-tab. This is a temporary filter and will be lost once you exit 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. Section 6.9.4 provides for more information about the timeframes.

4.1.1 Filter Group Box

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

Get Events: If you change the filters in the Filters group box, click the **Get Events** button to update the display.

Save: After you have changed the filters using the filter features in the Filters group box and you want these to be the default filters, click **Save**. This means those filters will be in effect when you use iCare in another session. This action changes the filters in User Preferences (on the CMET tab).

Restore to User Pref: If you used the CMET filter features in the Filters group box and you want to return to the last-saved CMET filters in **User Preferences**, click the **Restore to User Pref** button.

4.1.2 Events Sub-Tab Layout

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

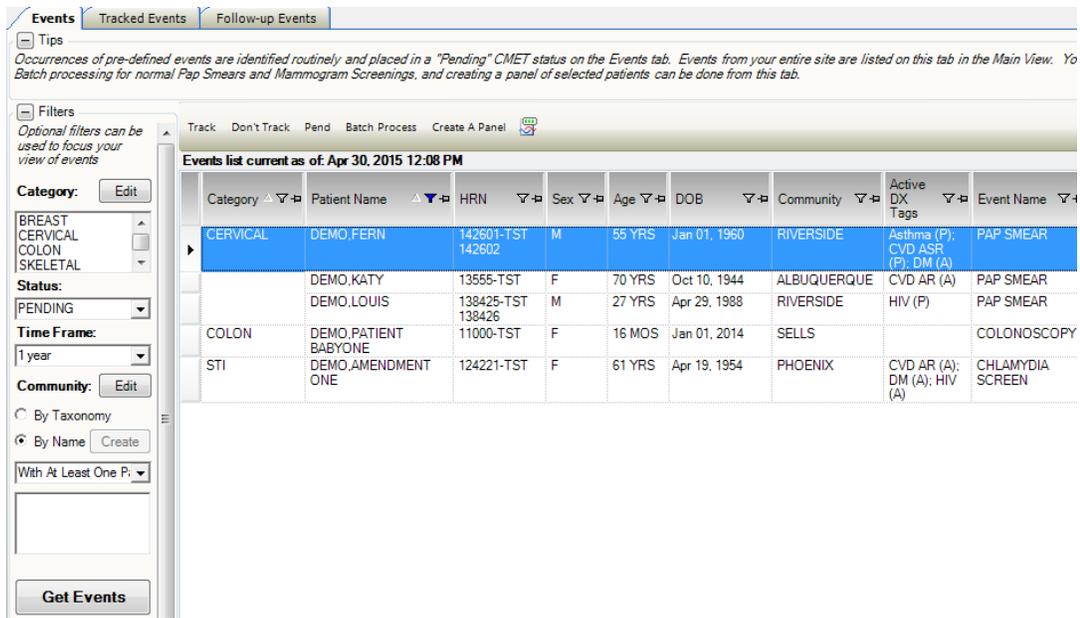


Figure 4-2: Sample Columns on **Events** sub-tab

The following table provides information about the columns on the **Events** sub-tab.

Column Name	Meaning
Category	The name of the category for the event: Breast, Cervical, Colon, Skeletal, STI.
Patient Name	Required field and will link to the Events sub-tab of the CMET tab on the Patient Record if you double-click on it.
HRN	Patient's Health Record Number.
Sex	F (for female) or M (for male)
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..
Event Date	The date associated with the event.
Result	The date of the result of the event. This cell also has hover help, such as V Radiology.
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: Category, Date of Event (newest listed first), Patient Name (in alphabetical order).

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

You can view the CMET - Visit Detail pop-up for any underlined date in the Event Date column by double-clicking the date.

You can view a particular detail pop-up for any underlined date in the Result column by double-clicking the date.

If there exists 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. You cannot track this type of event.

4.1.3 Buttons on Events Sub-Tab

Please consider the following:

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

4.1.3.1 Track

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 changed to Tracked and that is not correct, you need to go to the Tracked tab, then access the CMET worksheet for the event you tracked in error.

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



Figure 4-3: Sample **RPMS iCare - Track - Findings Due Date** dialog

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

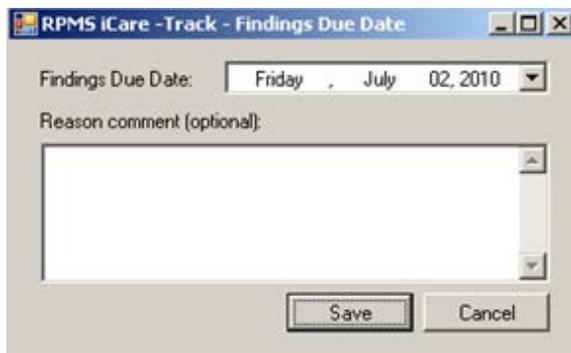


Figure 4-4: Sample **RPMS iCare - Track - Findings Due Date** dialog for multiple events

In either case, do the following:

- Make sure that the correct date is in the Findings Due Date field (required). If you need to change it, click the drop-down list to access a calendar (where you can 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** to not save). When you use **Save**, this changes the status of the events to Tracked. These events will display on the **Tracked** events sub-tab of the main window.

If you use the **Save and Enter Findings** button for a single event, the application displays the CMET Worksheet (where you can add Findings to the event, for example). Section 4.4 provides for more information about the worksheet. After saving the worksheet, you return to the **Events** sub-tab.

4.1.3.2 Don't Track

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 you select **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 erroneously tracked in error, section 4.5 provides for more information about how to handle this error.

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

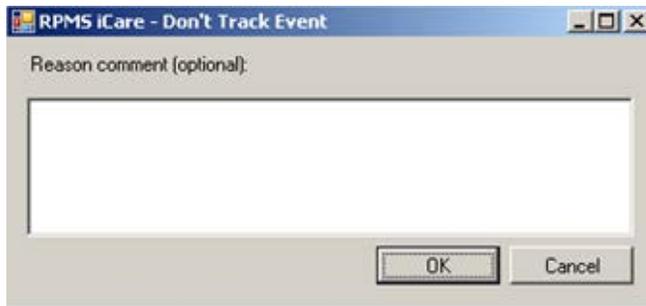


Figure 4-5: Sample **RPMS iCare – Don't Track Event** dialog

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**.)

4.1.3.3 Pend

Use the Pend function 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 you select 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.

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

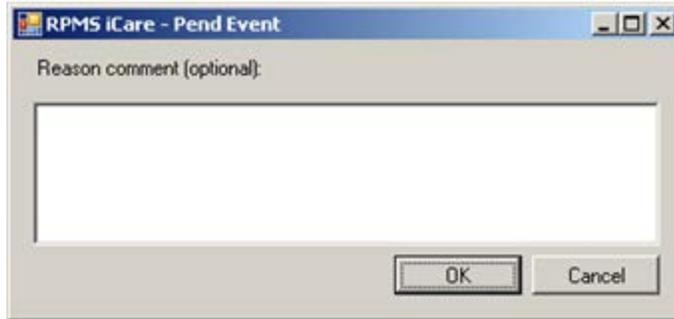


Figure 4-6: Sample **RPMS iCare – Pend Event** dialog

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**.)

4.1.3.4 Batch Processing

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 you selected 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 you have selected 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 that you want 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 you selected the mammogram screening events that are eligible for this process, the application displays the CMET Batch **Mammogram Screening** dialog. Section 4.1.4 provides for more information about this dialog.

- If you selected the pap smear events that are eligible for this process, the application displays the **CMET Batch Pap Smear** dialog. Section 4.1.5 provides for more information this dialog.

4.1.3.5 Create a Panel

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 then click the **Create Panel** button (or select **Create Panel** on the context menu) to access the **Create Panel** dialog.

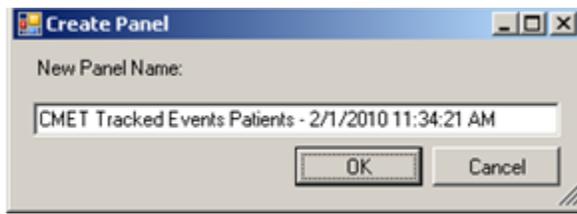


Figure 4-7: **Create Panel** dialog

You can 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.

4.1.3.6 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** window.

4.1.4 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 - NEGATI 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	CI	DOB	Sex	Event Date
		CI	Dec 02, 1947	F	Feb 22, 2010
		CI	Jan 15, 1951	F	Feb 22, 2010

OK Cancel

Figure 4-8: Sample **CMET Batch Mammogram Screening** dialog

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

4.1.4.1 Fields on Dialog

The required fields have the asterisk (*) following the name.

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

Event Finding: This indicates the event finding. The drop-down 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 drop-down 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 drop-down list. The options on the drop-down list are defined by the application (sites cannot add values).

Create: The Create button is active when the Notification Type is Letter or Certified Letter. This function requires that you have an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. Section 4.6 provides for more information about this dialog.

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

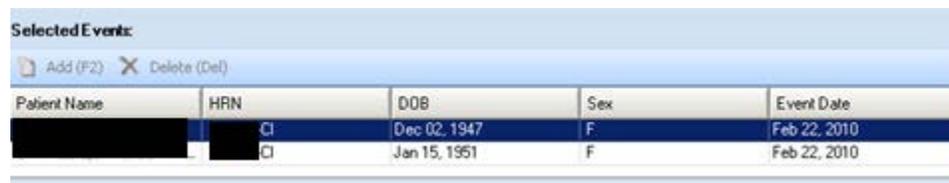
Event State: This shows the state of the event (view only).

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.

4.1.4.2 Selected Events Group Box

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



Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	CI	Dec 02, 1947	F	Feb 22, 2010
[REDACTED]	[REDACTED]	Jan 15, 1951	F	Feb 22, 2010

Figure 4-9: Sample **Selected Events** group box

4.1.5 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	May 06, 1983	F	Jul 02, 2009
	CI	Nov 19, 1950	F	Jul 06, 2009
	CI	Mar 09, 1965	F	Jul 06, 2009

OK Cancel

Figure 4-10: Sample **Batch Pap Smear** dialog

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

4.1.5.1 Fields on Dialog

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

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 timeframe for the follow-up. The drop-down 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 drop-down list. The options on the drop-down list are defined by the application (sites cannot add values).

Create: the Create button is active when the Notification Type is Letter or Certified Letter. This function requires that you have an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. Section 4.7 provides for more information about this dialog.

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

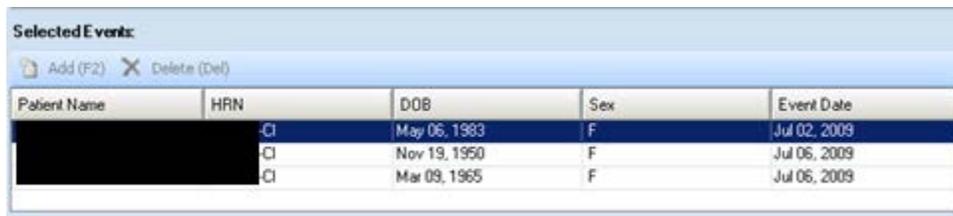
Event State: This shows the state of the event (view only).

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.

4.1.5.2 Selected Events Group Box

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



Patient Name	HRN	DOB	Sex	Event Date
	<input type="checkbox"/>	May 06, 1983	F	Jul 02, 2009
	<input type="checkbox"/>	Nov 13, 1950	F	Jul 06, 2009
	<input type="checkbox"/>	Mar 09, 1965	F	Jul 06, 2009

Figure 4-11: Sample **Selected Events** group box

4.2 Tracked Events Sub-Tab

The **Tracked Events** sub-tab displays all events at your site that have been designated as “Tracked” by all CMET users. This can be a very large number of events, but you can limit this display by applying filters to your view. Filtering in this manner does not affect the routine background job.

Tracked Events

Tips
 CMET Events that have a status of "Tracked" can be viewed and processed from this tab. Activity related to Findings, Follow-ups, and Patient Notifications can be entered using the CMET Worksheet. The checkmark icons indicate steps that have been completed and feather icons indicate steps that are overdue. The Main view displays all Tracked events at your site. Suggestion: For easier management of your patients' CMET activity, create and work from a smaller Panel view rather than this Main view.

Filters
 Optional filters can be used to focus your view of events:

Category: Edit
 BREAST
 CERVICAL
 SKELETAL
 COLON

State:
 OPEN

Time Frame:
 1 year

Community: Edit

By Taxonomy
 By Name Create

With At Least One P

Get Events

Save current settings to User Preferences?
 Save
 Restore to User Pref

Category	1 - Event	Event Date	Result	2 - Finding(s)	Interpretation	3 - Follow-up(s)
CERVICAL	PELVIC EXAM	Jul 13, 2012			Normal	
	OB/GYN CONSULT	Mar 21, 2012				
STI	CHLAMYDIA SCREEN	Oct 09, 2012				
	GONORRHEA SCREEN	Oct 09, 2012				
	CHLAMYDIA SCREEN	Aug 27, 2012				
	HPV - DNA SCREEN	Jul 13, 2012				
	CHLAMYDIA SCREEN	Jun 07, 2012	Jun 07, 2012			

Figure 4-12: Sample 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. You can collapse this information in order to have more room for viewing the Tracked Events data.

The Filters area provides filters for applying filter criteria to the tracked events data. You can collapse this area in order to have more room for viewing the tracked events data.

Note: You can 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. Section 4.2.1 provides for more information about these filters.

You can (also) filter the columns on the Tracked Events sub-tab. This is a temporary filter and will be lost once you exit the application.

4.2.1 Filter Group Box (Tracked Events)

Use the filter features shown under the Filters group box. This means you can filter the events by using one or more of the following: Category, State, Time Frame, Community. Then you must use 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 Tracked Events Sub-Tab Layout

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

The following table provides information about the columns on the Tracked Events sub-tab.

Column Name	Meaning
Category	The name of the category for the tracked event: Breast, Cervical, Colon, Skeletal, STI.
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 where the result came from (V-RADIOLOGY, V-LAB).
2 - Finding(s)	Icon that indicates if the event has any Findings.
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.
3 - Follow-up(s)	Icon that indicates if the event has any follow-up data.
4 - Patient Notification(s)	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.

Column Name	Meaning
Patient Name	Required field and will link to the Tracked Events sub-tab of the CMET tab on the Patient Record if you double-click on it.
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 a display that makes review of the CMET activity simple.

The Finding(s) cell can contain the following:

- The “feather” () icon indicates that entry of a Finding is overdue based on the tickler time frames. Hover your mouse over the icon to view the Due Date.
- The check () icon indicates that the Finding has been entered. Hover your mouse over the icon to view the Finding Due date and the Finding Value.
- An empty cell that 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 entry of recommended follow-up is overdue based on Tickler timeframes. Hover your mouse over the icon to view the Due Date.
- The check () icon indicates that follow-up has been entered. Hover your mouse over the icon to view the Follow-up Date and the Follow-up type.
- An empty cell that 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 your mouse over the icon to view the Due Date.
- The check () icon indicates that the type of Patient Notification has been entered. Hover your mouse over the icon to view the notification date and type.

- An empty cell that 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, you can view the Community Alert text by hovering your mouse over the icon. The icon does not affect the sorting of the Community column.

You can view the CMET -Visit Detail pop-up 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.

4.2.3 Buttons on Tracked Events Sub-Tab

4.2.3.1 Reopen

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



Figure 4-13: 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 you select more than one event and use 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.

4.2.3.2 Close

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



Figure 4-14: **RPMS iCare – Reason for Closing** dialog

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

Reason: select an option from the drop-down 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 = 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**.)

4.2.3.3 Batch Process

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

If you select 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, section 4.1.4 for more information.

- For pap smears, section 4.1.5 provides for more information.

4.2.3.4 Open CMET Worksheet

Select an event and then click the **Open CMET Worksheet** button (or select **Open CMET Worksheet** on the context menu) to access the CMET Worksheet (for the event). Here you can enter Finding(s), Follow-up(s), and Patient Notification(s) for the event. Section 4.4 provides for more information about the worksheet.

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

4.2.3.5 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 then click the **Create Panel** button (or select **Create Panel** on the context menu).

4.2.3.6 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.

4.3 Follow-up Events Sub-Tab

The **Follow-up Events** sub-tab contains events that you determined what you want to do for 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, but you can limit this display by applying filters to your view. Filtering in this manner does not affect the routine background job.

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

Tips
Follow-up Events are generated by the recommendation(s) made for the follow-up of a "Tracked" CMET event. A CMET Reminder is also generated by the same recommendation(s). The Main your site. Suggestion: For easier management of your patients' CMET activity, create and work from a smaller Panel view rather than this Main view. Group Order may be disabled by your Site

Filters
Optional filters can be used to focus your view of events

Open CMET Worksheet Create A Panel

Category	Follow-up Event Name	Follow-up Event Date	Ordered	Preceding Event	Patient Name
BREAST	MAMMOGRAM SCREENING	Mar 10, 2015	No	Mar 13, 2014	DEMO,ALISTER LANE
	BREAST RECONSTRUCTION W/IMPLANTS	Jul 10, 2014	No	Mar 19, 2014	DEMO,CDSADULT FEMALE
CERVICAL	PAP SMEAR	Jun 10, 2016	No	May 12, 2014	DEMO,KATY
	PAP SMEAR	May 11, 2016	No	May 12, 2014	DEMO,AMENDMENT ONE
	PAP SMEAR	May 11, 2016	No	May 12, 2014	DEMO,FERN
	PAP SMEAR	Mar 19, 2016	No	Nov 20, 2014	DEMO,VICTOR
	PAP SMEAR	May 10, 2015	No	May 13, 2014	DEMO,ASHLEY
	PELVIC EXAM	Oct 10, 2013	No	Jul 01, 2013	DEMO,KATY

Get Events

Figure 4-15: Sample **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. Multiple recommendations for Follow-up can be entered. 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. You can collapse this information in order 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. You can collapse this area in order to have more room for viewing the follow-up events data.

Note: You can 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.

You 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 you exit the application.

4.3.1 Filters Group Box (Follow-up Events)

Use the filter features shown under the **Filters** group box. This means you can filter the events by using one or more of the following: Category, Time Frame, Community. Then, you must use the Get Events button to re-display the events. Section 4.1.1 provides for more information about using the filters.

The Get Events, Save, and Restore to User Pref buttons work like those on the Events sub-tab. Section 4.1.3 provides for more information about this sub-tab.

4.3.2 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.

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

The following table provides information about the columns on the **Follow-up Events** sub-tab.

Column Name	Meaning
Category	The name of the category for the follow-up event: Breast, Cervical, Colon, Skeletal, STI.
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 you double-click 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 you move your mouse over the date (for example, PAP SMEAR).
Patient Name	This is the name of the patient.
HRN	Patient's Health Record Number.
DOB	Patient's date of birth.
Age	Patient's age today.
Sex	F (for female) or M (for male)
Community	Patient's community of residence.

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

If you double-click any event (not on the Preceding Event cell), the application displays the CMET Worksheet for the event. Section 4.4 provides more information about the worksheet.

4.3.3 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. Section 4.2.3 provides for more information about the buttons.

4.4 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. You 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 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.

Figure 4-16: Sample **CMET Worksheet**

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

- When you use **OK**, there are two cases.

Case 1: if all of the steps are not 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? Use **Yes** to close the event. Use **No** to not close the event.

If you choose to close the event (by selecting **Yes** on the Close Event message), the application displays the **RPMS iCare Reason for Closing** dialog. Here you 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**).

If you use **OK on the Reason for Closing** dialog, the application displays the “Save to RPMS?” dialog that states: You have data changes pending. Do you want to save to RPMS now? Click **Yes** to save the changes to RPMS. Click **No** to not save the changes.
- When you use **Cancel**, there are two cases:

Case 1: if you did not make any changes on the worksheet, the application closes it.

Case 2: if you did make changes on the worksheet, the application displays the “Save to RPMS?” dialog that states: You have data changes pending. Do you want to save to RPMS now? Click **Yes** to save the changes to RPMS. Click **No** to not save the changes. Click **Cancel** to return to the CMET Worksheet.

4.4.1 Patient Demographics Group Box

The Patient Demographics group box shows the patient’s name, HRN, Sex, Age, and DOB.

4.4.2 1 - Event Group Box

The data in the 1 – Event group box provides information about the event and allows you to change the State of the event as well as provide comments about the Event and/or State. In addition, you 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 4-17: Sample **Event** group box

State: This field defines the State of the event.

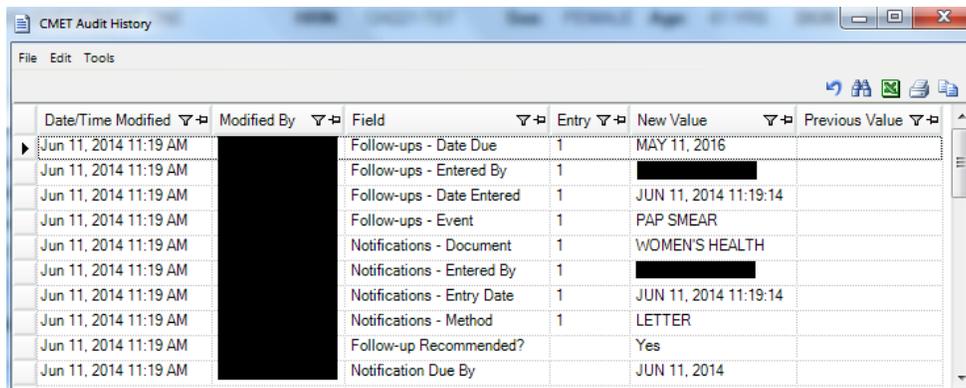
If you populate the State field with Closed, then the **Close Reason** field becomes active where you select an option from the drop-down list that describes why you are closing the event.

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 you click 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 4-18: Sample **CMET Audit History** pop-up

Because multi-users work on the event, the audit history provides a history of those activities.

State: This is determines the state of the event, either Open or Closed. If “Closed” is used, then the Close Reason field becomes active.

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

Close Reason: This field is active when State = Closed. Select an option on the drop-down list that gives the reason for closing the event.

4.4.3 2 - Findings Group Box

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



Figure 4-19: Sample **Findings** group box

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

The Findings Due By, Result, and Follow-up Recommended? fields become populated when you use the Add button on the grid and save 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” (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 detail of the result. For example, below is the Radiology Case Number Detail [pop-up](#).

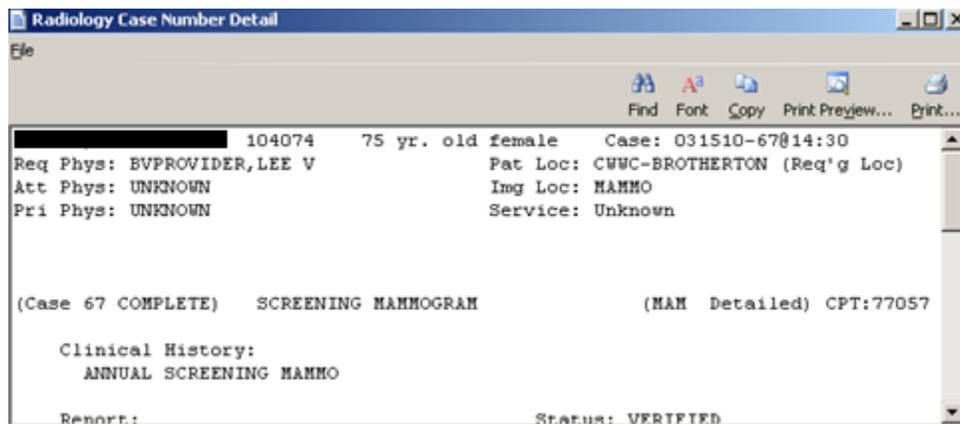


Figure 4-20: **Radiology Case Number Detail**

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

4.4.3.1 Add Button

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

Figure 4-21: **Findings** dialog

The field names followed by an asterisk (*) are required.

Date: Click the drop-down list and select a date for the finding.

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

Interpretation: The application populates this field, based on your 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: Use an option from the drop-down list: Yes or No.

Click **OK** to save your data on the **Findings** dialog (otherwise, click **Cancel** to not save).

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.

If you saved and had selected Yes for “Follow-up Needed” field (on the Findings dialog), this will cause the “Follow-up Recommended?” field on the grid to be populated with Yes and the application will automatically display the Follow-Ups dialog (where you can enter follow-up data).

4.4.3.2 Delete Button

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

If you select 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 you want to delete and click the Delete button (or press the Delete button on your keyboard). The application displays the Delete Row information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **NO** to not delete the records.

4.4.3.3 Error Button

Use the Error button when Findings records have been saved and you cannot delete them and you want to mark them as Entered in Error.

If you select 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 text of the record.



Figure 4-22: Sample Entered in Error marking

After you save and return to the **Tracked Events** tab, the **Result** column for the event will be blank for the particular event.

4.4.4 3 - Follow-ups Group Box

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

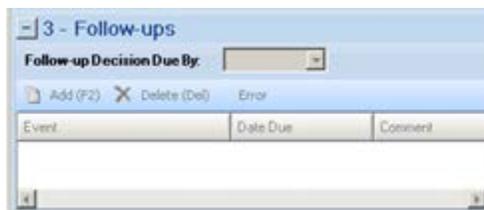


Figure 4-23: **Follow-ups** group box

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

You can minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the other group box (Patient Notifications).

Follow-up Decision Due By: select a date from the drop-down 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. You can populate this field with the date you want to take action on the event.

4.4.4.1 Add Button

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

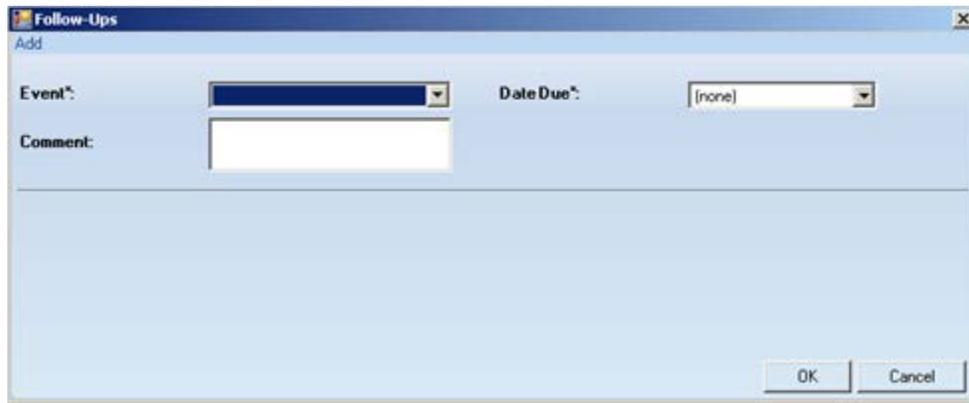


Figure 4-24: Sample **Follow-Ups** dialog

The required fields are those with the asterisk after the name.

Event: select an option from the drop-down list that describes the Event for the follow-up.

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

Comment: use 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.

4.4.4.2 Delete Button

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

Select one or more eligible Follow-up records you want to delete and then click the **Delete** button (or press the Delete button on your keyboard). The application displays the Delete Row information message, confirming the deletion. Click **Yes** to delete the selected records. Click **No** to not delete the records.

4.4.4.3 Error Button

Use the Error button when Follow-up records have been saved and you cannot delete them and you want to mark them as Entered in Error.

If you select 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.

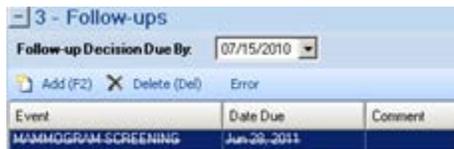


Figure 4-25: Sample of Follow-up record marked as entered in error

4.4.5 4 - Patient Notifications Group Box

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



Figure 4-26: **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.

You can 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 your 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.

4.4.5.1 Add Button

If you do not have default clinics 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 the F2 button on your keyboard) to access the **Notifications** dialog.

Figure 4-27: Sample initial **Notifications** dialog

The required fields are those with the asterisk after the name.

Date: the default date is today's date. You can change it by clicking the drop-down list to access a calendar from which to select another date.

Method: select an option from the drop-down list that identifies the type of notification.

Create: this button becomes active if you select "Certified Letter" or "Letter" in the Method field. You must have an electronic signature on file before you can use this function.

If you have an electronic signature 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.

4.4.5.2 Delete Button

The Delete function applies to events that had Patient Notifications entered but NOT saved.

Select one or more eligible Patient Notification records you want to delete and click the **Delete** button (or press the Delete button on your keyboard). The application displays the Delete Row information message, confirming the deletion. Click **Yes** to delete the selected records. Click **No** to not delete the records.

4.4.5.3 Error Button

Use the Error button when Patient Notification records have been saved and you cannot delete them and you want to mark them as Entered in Error.

If you select 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 then click the **Error** button. After using this function, the application places a strikethrough mark on the text of the record.



Figure 4-28: Sample **Patient Notification** record marked as entered in error

4.4.5.4 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 or Certified Letters.

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



Figure 4-29: Sample **Letter Preview** pop-up

4.4.5.5 Print Button

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

4.5 Erroneously Tracked Events

Once an event has been Tracked, it cannot be changed to Not Tracked. The following process is used when you erroneously Tracked an event.

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

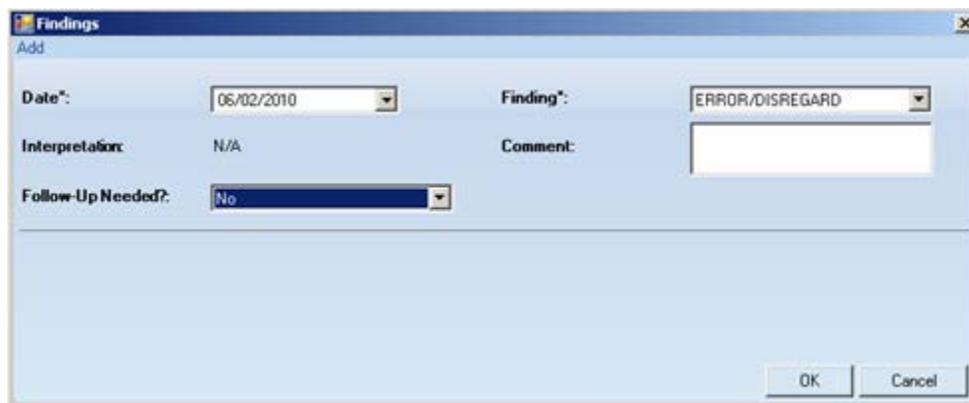


Figure 4-30: Sample **Findings** dialog populated

Choose the option **ERROR/DISREGARD** in the Findings field. Choose the option **No** in the **Follow-Up Needed?** field. We suggest to 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 4-31: Sample **Notifications** dialog populated

Use the option **NONE** for the Method field. We recommend to add a comment in the Comment field and to use 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.

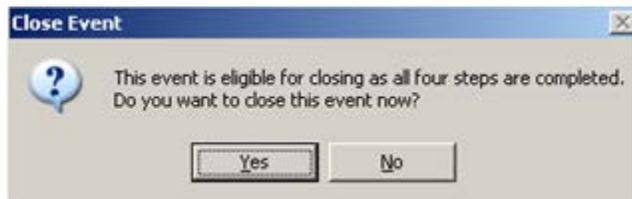


Figure 4-32: **Close Event** information message

Click **Yes** on the message. This closes the message.

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

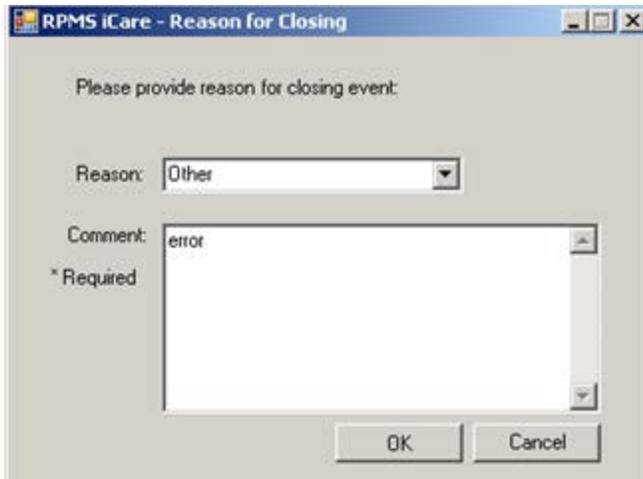


Figure 4-33:RPMS iCare – Reason for Closing dialog

Select the option **Other** for the **Reason** field. Enter 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 4-34: **Confirm save to RPMS** information message

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

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

4.6 Using Create Button on Batch Processing Window

If you are 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.

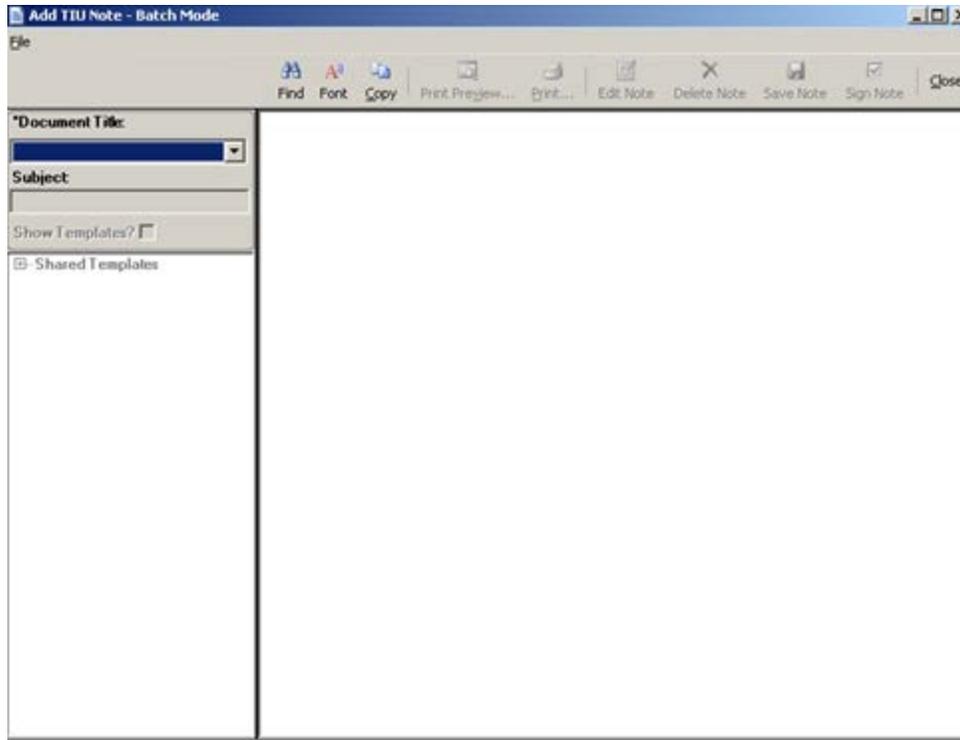


Figure 4-35: Sample **Add TIU Note – Batch Mode** dialog

4.6.1.1 Fields

Both fields are required.

Document Title: select an option from the drop-down 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, you can do one of the following: not use a template (section 4.7.1.1 provides more information) or use a template (section 4.7.1.2 provides more information).

4.6.1.2 Buttons

The Find, Font, Copy, Print Preview, and Print buttons on this dialog work like those on the pop-up window.

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

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

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

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

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

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

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



Figure 4-36: **Enter Electronic Signature** dialog

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

4.6.1.3 Printing the TIU Note

When you use **OK** (on the **Enter Electronic Signature** dialog), the application displays the **Print TIU Notes** information message.

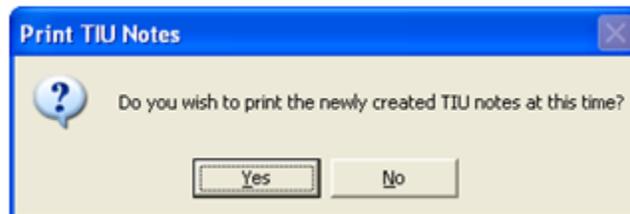


Figure 4-37: **Print TIU Notes** information message

Click **Yes** to print the TUI note. The application displays the **Print Preview** dialog. You can 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 gives you a second time to print the TUI note.

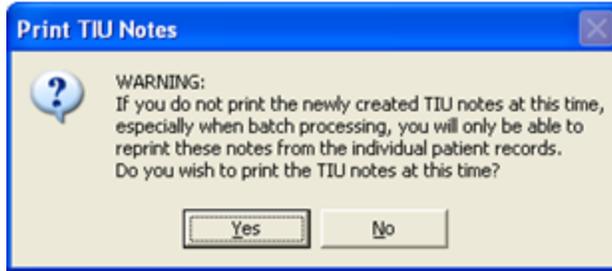


Figure 4-38: **Print TIU Notes** information message

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

If you use **Yes**, the application displays the **Print Preview** dialog. You can print the TIU from this dialog.

4.7 Add TIU Note Dialog

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

4.7.1 Using the Add a Note Button

When you click the **Add Note** button, the application displays the **Add a Note** dialog.

After clicking the **Create** button on the **Add a Note** dialog, the application displays the **Add TIU Note** dialog.

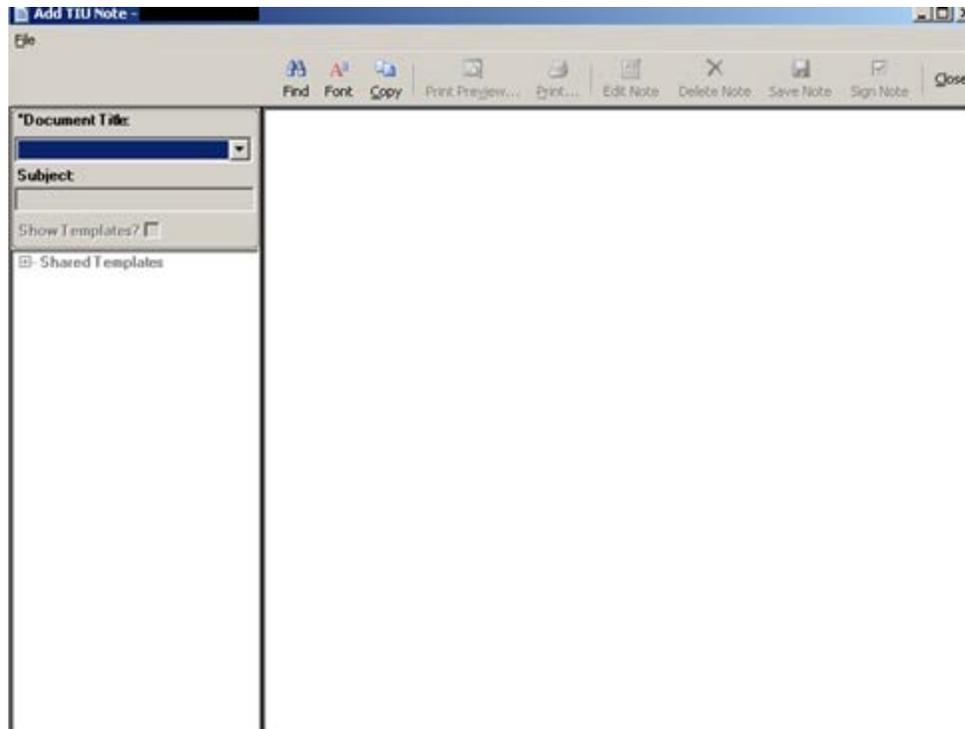


Figure 4-39: Sample **Add TIU Note** dialog

Both fields are required.

Document Title: select an option from the drop-down 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, you can do one of the following: not use a template or use a template.

4.7.1.1 Note with No Template

When you do not want to use a template, and, after you populate the Document Title and Subject fields, you can 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. Section 4.7.1.3 provides for more information.

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

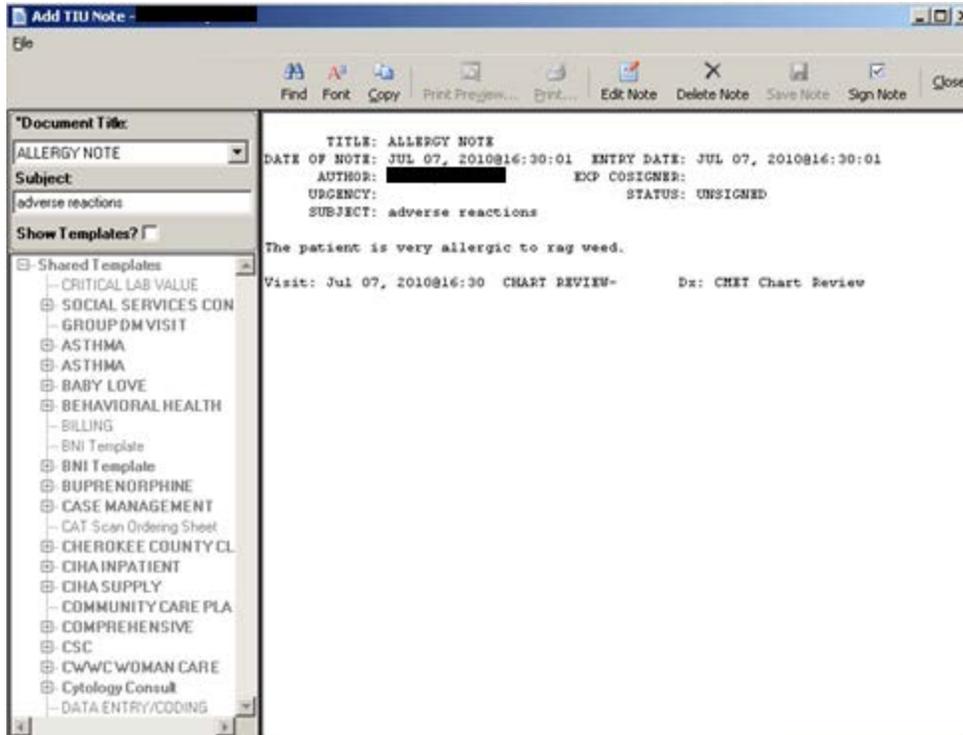


Figure 4-40: Sample **Add TIU Note** dialog with note information

4.7.1.2 Note with Template

After you populate the Document Title and Subject field, check the **Show Template?** check box. This action shows the available templates that you can use. (You will need to expand the Shared Templates option.) After you find the template you want to use, double-click on its name. The application will display the particular template.

Figure 4-41: Sample **Template**

You can complete the template by using the buttons and check boxes on the template. What you use on the template determines the text of the TIU note.

Use the **Preview** button (on the Template window) to “preview” the note, in its current state.

Figure 4-42: Sample Preview of the TIU note

What appears on the Template Preview pop-up determines what will be in the text of your TIU note. After you close (**File | Close**) the pop-up, you return to the Template window.

After you have completed the Template window, click **OK** (otherwise, click **Cancel**). The **OK** option returns you to the **Add TIU** dialog.

4.7.1.3 Buttons on Add TIU Note Dialog

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

- Line lengths should be <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.
- You should adjust the font size before saving the TIU note, if needed.

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

Save Note: use 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: use 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 4-43: **Enter Electronic Signature** dialog

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

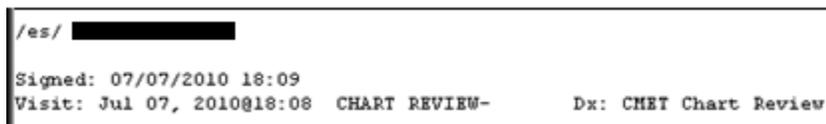


Figure 4-44: Sample electronic signature noted on text of TIU note

Edit Note: after you click the **Edit Note** button, the application displays the text of the note.

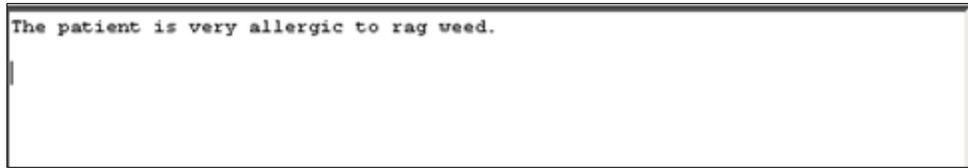


Figure 4-45: Example of text of the note

After you edit the text of the note, you can use the **Save Note** button again.

If you have already signed the TIU note, you cannot change the text; you can only view the text.

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

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



Figure 4-46: Sample **Add a Note** dialog with **Preview** button

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



Figure 4-47: Sample **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 4-48: **Enter Electronic Signature** dialog

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

- If you click **OK** and had entered an invalid electronic signature, the application displays the Invalid Attempt information message that states: 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.
- If you click **Cancel**, the application displays the message: Unable to save with a signed note. Click **OK** to dismiss the message.
- If you click **OK** and had entered a valid electronic signature, 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 to continue. Click **No** to not save and leave the dialog.

5.0 Menus on the CMET Tab

5.1.1 File Menu

The File menu has the following options:

CMET: this shows various options depending on the sub-tab you are currently on.

Change RPMS Server/Login: This [option](#) allows you to change your access and verify codes to the iCare application on the iCare 2.4 Login dialog.

Change RPMS Division: This option allows you 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 shows your recent panels. If you select one, you can view the patients in the selected panel in a new window. The list of panels is the last five panels that you have viewed.

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

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

Print: This option sends the selected rows in the grid 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: The option allows you to leave the iCare application. You will be reminded to save any changed panels (if needed).

Lock iCare: This option allows you to lock the iCare application. You resume with the application by entering your verify code on the iCare locked by dialog and clicking **Resume**.

5.1.2 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: This option allows you to search for a patient name. This is the same as using the F8 key on your keyboard.

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

Manage Templates: This [option](#) takes you to 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 you to set site parameters for Employers, Pregnancy, Inactivity Time Out, CMET Site Parameters, IPC Site Parameters, MU Site Parameters, Divisions.

Taxonomy Maintenance: This option is used by those users who can maintain taxonomies. Also, you 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.

5.1.3 View Menu

The option on the View menu is:

Split View: When this option is checked, that means that the current view is the split view. You can change back to the CMET tab by removing the checkmark; this is a temporary setting. When you exit iCare and reopen iCare, the settings established in User Preferences (Startup View) are used for the default view.

6.0 iCare Features Used by CMET Main Window

The following provides information about using the iCare features for the CMET main window.

6.1 User Preferences

This section focuses on the user preferences that are used by the CMET main window.

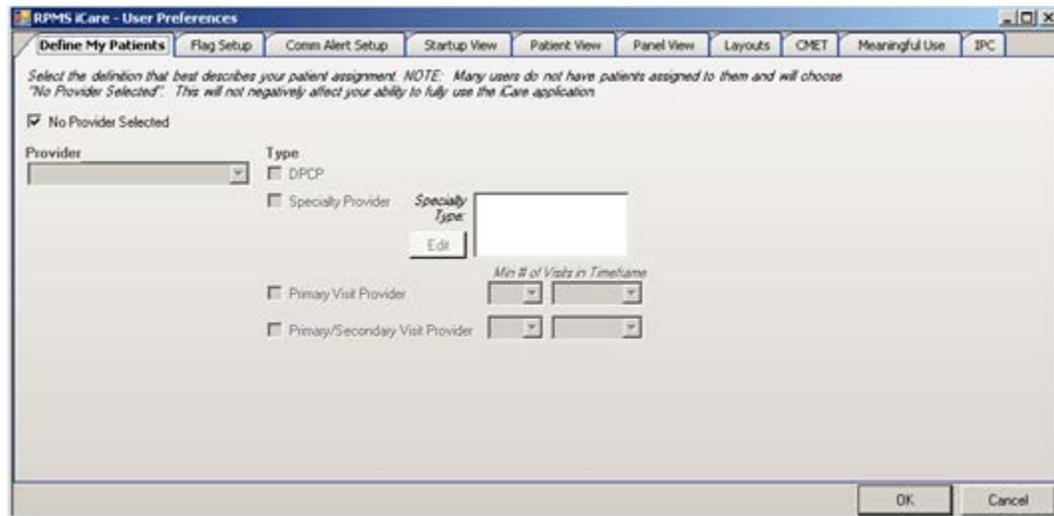


Figure 6-1: Sample **User Preferences** window

After the User Preferences window is complete, click **OK** and the user preferences will be in effect for the operation of the iCare application. (Otherwise, click **Cancel**.)

6.1.1 Startup View Tab

The selection on **Startup View** tab determines the tab that displays when you first access the iCare application.



Figure 6-2: Sample **Startup View** tab on **User Preferences**

Select the **CMET** radio button if you want the CMET main window to be the first window to display when you access the iCare application. In addition, you must select the sub-tab to be displayed (Events is the default). Select an option from the drop-down list to change the sub-tab.

6.1.2 Layouts Tab

The **Layouts** tab on **User Preferences** determines the default Template used by the various CMET sub-tabs.

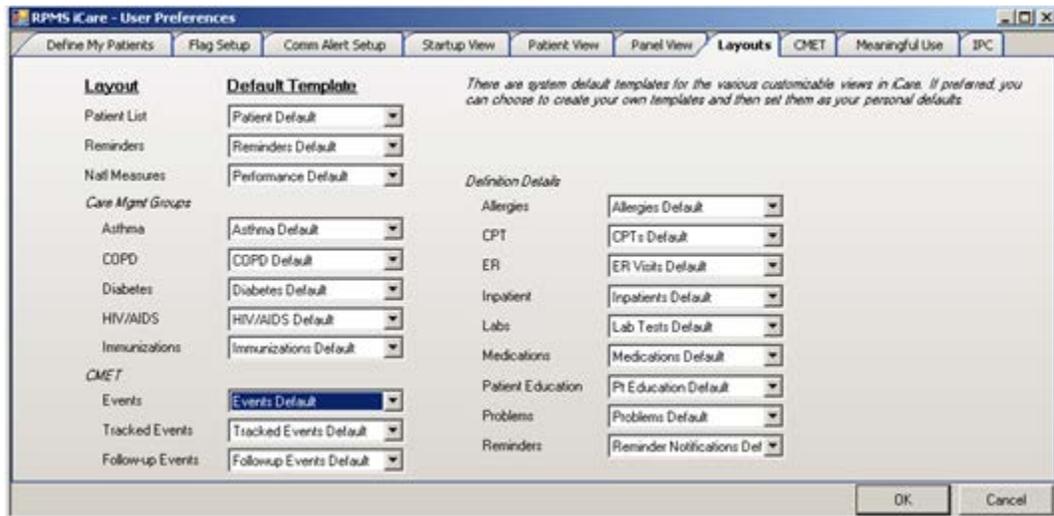


Figure 6-3: **Layouts** tab on **User Preferences**

6.1.3 CMET Tab

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

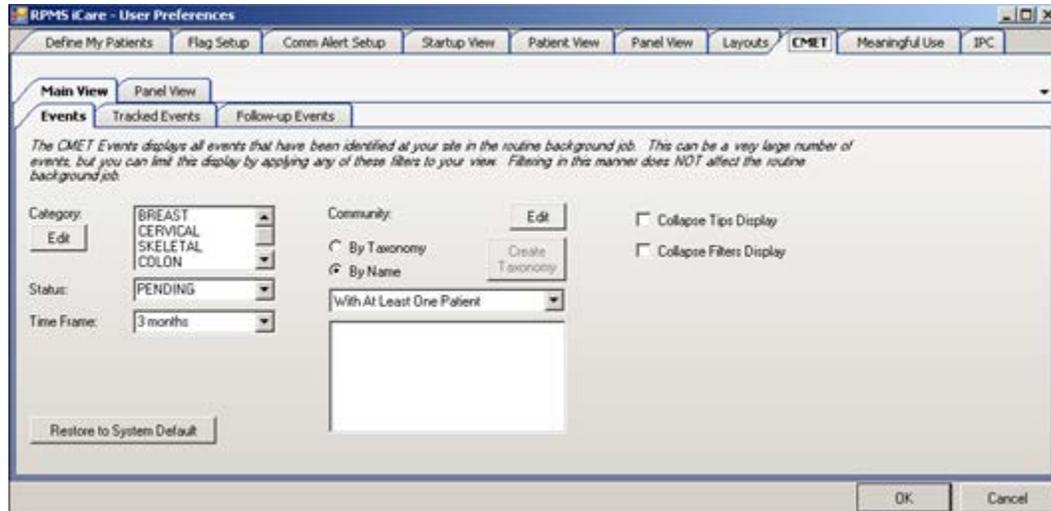


Figure 6-4: **Main View** tab features

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

Return to System Default Button.

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

Collapse Tips Display

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

Collapse Filters Display

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

Status

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

Time Frame

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

6.1.3.1 Events Sub-tab

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

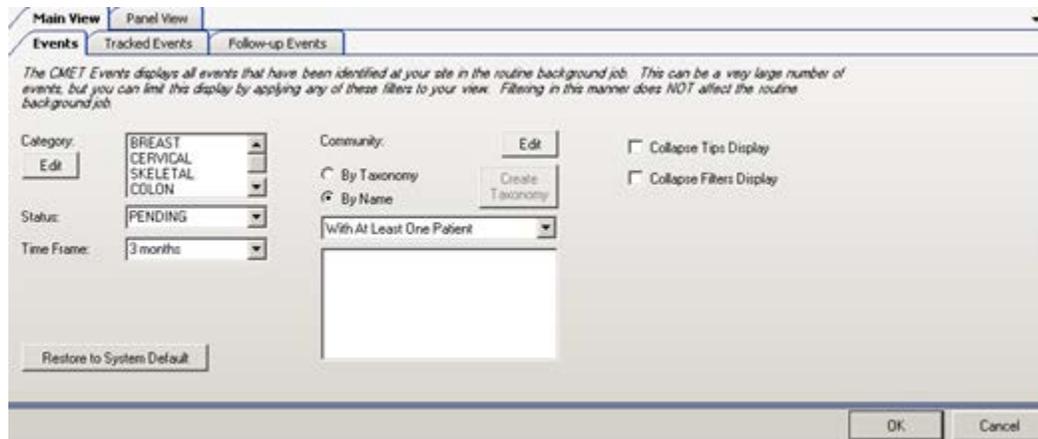


Figure 6-5: **Events** sub-tab options for **Main View**

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, but you can limit this display by applying filters to your 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.

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

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

All three sub-tab have the same features.

6.1.3.1.1 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 contains Breast, Cervical, Colon, Skeletal, STI.

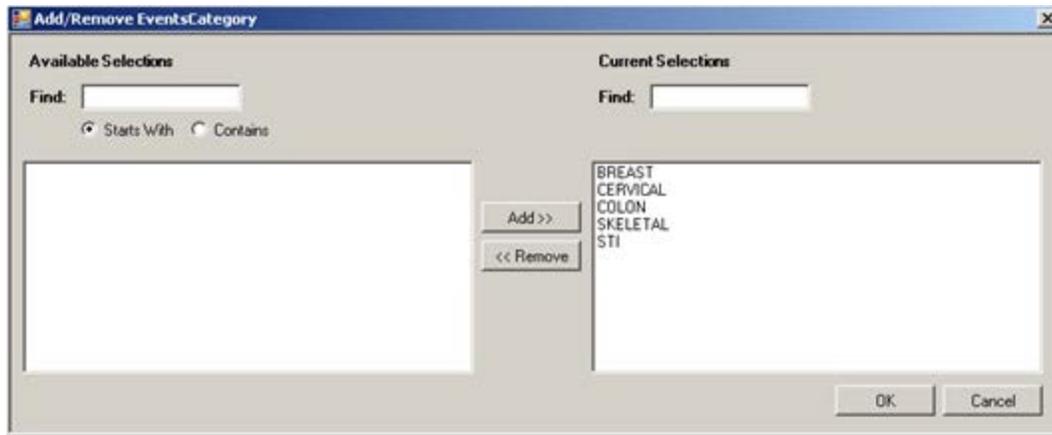


Figure 6-6: Sample **Add/Remove Events Category** dialog

Available Selections

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

To move a highlighted 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 highlighted 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.

6.1.3.1.2 Community

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

Figure 6-7: **Community** filter fields

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

By Name Radio Button

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

Use the field below the radio 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.

Figure 6-8: Sample **Add/Remove Communities** dialog

Available Selections

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

Section 6.1.3.1.1 provides information on how to use the **Available Selections** and **Current Selections** group boxes.

When the **Add/Remove Communities** dialog is complete, click **OK** and this populates the lower field with the names of the communities shown in the Current Selections group box. (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.

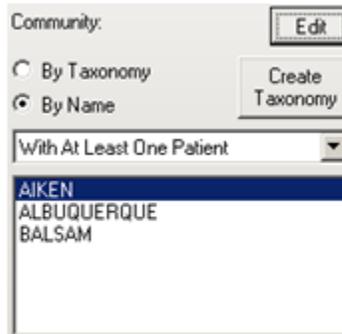


Figure 6-9: Community group box with Create Taxonomy active

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 6-10: **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 provide a warning that the user might be overwriting the user's taxonomy. The user can overwrite (Yes), save as another name (No), or cancel (to return to the Create/Update Community Taxonomy dialog).

If you use a unique taxonomy name, the application displays the “Confirm save to RPMS” information message that asks: 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**). If you use 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 you click **OK**, the list of names will be replaced with the name of the taxonomy (and the By Taxonomy radio button will be selected).

By Taxonomy Radio Button

Use the **By Taxonomy** radio button to define the taxonomies to filter the displayed events. When you click the **Edit** button, the application displays the **Add/Remove Community Taxonomies** dialog.

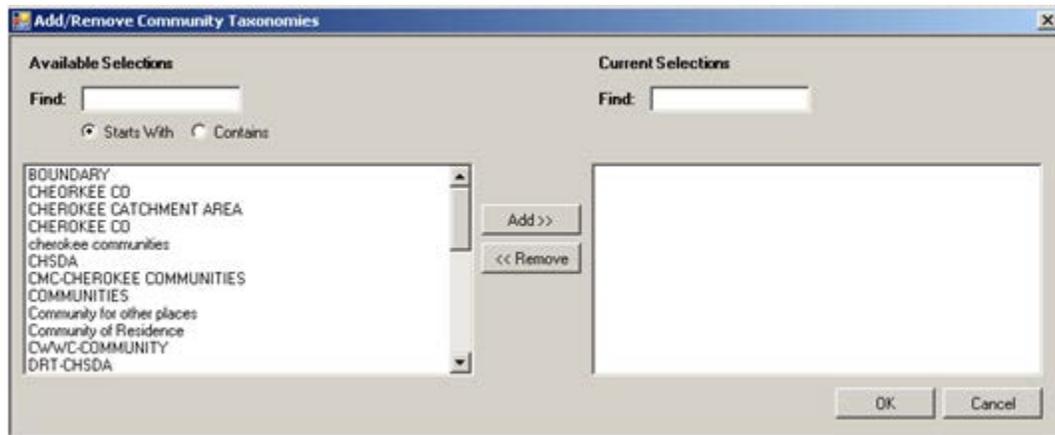


Figure 6-11: **Add/Remove Community Taxonomies** dialog

Section 6.1.3.1.1 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**.)

6.2 Free Text Fields

Free text fields are those fields that you can type information into; those types of fields do not have a drop-down 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.

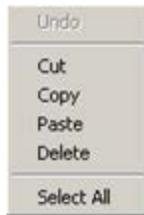


Figure 6-12: Context menu to aid in editing text

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.

6.3 Print Preview

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

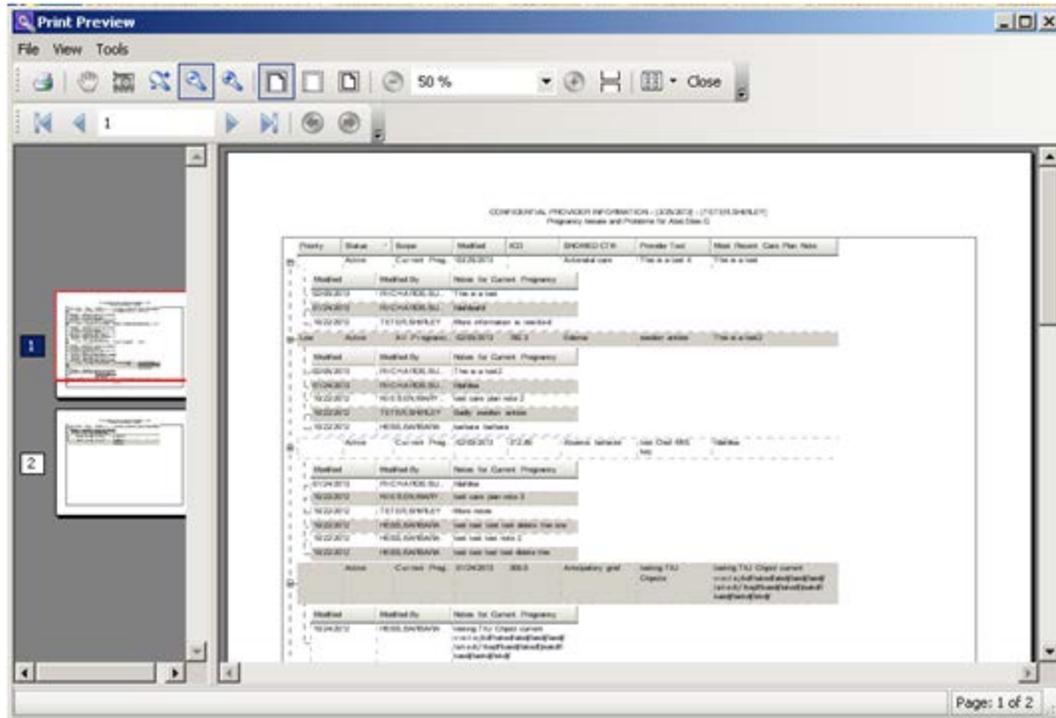


Figure 6-13: Sample **Print Preview** dialog

The **Print Preview** window contains two panels, where 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.

The following table provides information about the various buttons on the Print Preview window.

Button	Description
	Used to output the contents of the document. Also available by selecting Print option on the File menu.
	Used to move the red rectangular box on the selected page in the left panel. As you move the Hand Tool, this changes the display in the right panel. This is used to view information in a particular part of a page. Also available by selecting the Hand Tool option on the Tools menu.
	Used to get a screen capture of a specified rectangular area. This screen capture copies the area to the Windows clipboard. Then you can paste the copy in a particular field, for example, or another application like MS Word. Also available by selecting the Snapshot Tools option on the Tools menu.
	Used to specify the zoom magnification. Click the button and then move to the area where you want to apply to zoom. Right-click on the area and select the zoom magnification option from the context menu. Also available by selecting the Dynamic Zoom Tool option on the Tools menu.

Button	Description
	Used to zoom out by clicking the button in an area in the right panel (the image becomes smaller). Also available by selecting the Zoom Out option on the View menu.
	Used to zoom in by clicking the button in an area in the right panel (the image becomes larger). Also available by selecting the Zoom In option on the View menu.
	Used to cause the image in the right panel to display to its maximum page width (usually enlarges the image). Also available by selecting the Page Width option on the View menu.
	Used to cause the image in the right panel to display the image with no page margins showing. Also available by selecting the Margin Width option on the View menu.
	Used to display the image and its page margins in the right panel. Also available by selecting the Whole Page option on the View menu.
	Used to automatically cause the image in the right panel to zoom out (you do not click in the panel). Also available by selecting the Zoom Out on the View menu.
	Used to automatically cause the image in the right panel to zoom in (you do not click in the panel). Also available by selecting the Zoom In on the View menu.
	Used to cause all of the pages to display in the right panel. Also available by selecting the Continuous option on the View menu.
	Used to specify the page layout. Also available by selecting the Page Setup option on the File menu.

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



Figure 6-14: Buttons used to move through the pages of the document

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 the **Zoom** option on the **View** menu) to specify the zoom magnification for the right panel by selecting from the drop-down list.

Use the **Close** button to close the **Print Preview** dialog. This same action is available by selecting **File | Exit**.

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

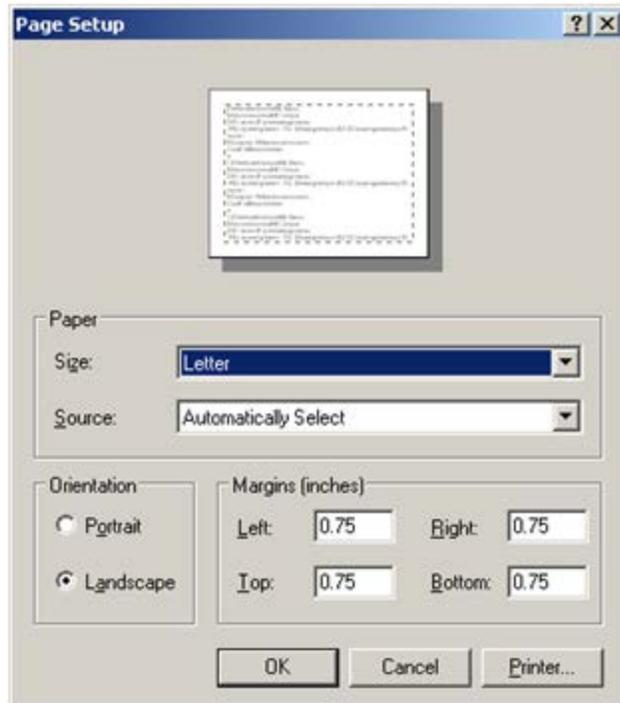


Figure 6-15: Sample **Page Setup** dialog

Use the **Paper** group box to specify the paper size and source.

Use the **Orientation** group box to specify the orientation of the output.

Use the **Margins (inches)** group box to specify the various margins widths in inches.

Click **Printer** to access the **Printer** dialog where you choose the printer to output the contents of the document.

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

6.4 iCare Package Manager Functions

When you have the Package Manager security key, you can access the functions by selecting **Tools | iCare Package Manager** on the iCare main window.



Figure 6-16: **iCare Package Manager** Functions

6.4.1 iCare User Access Management

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

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

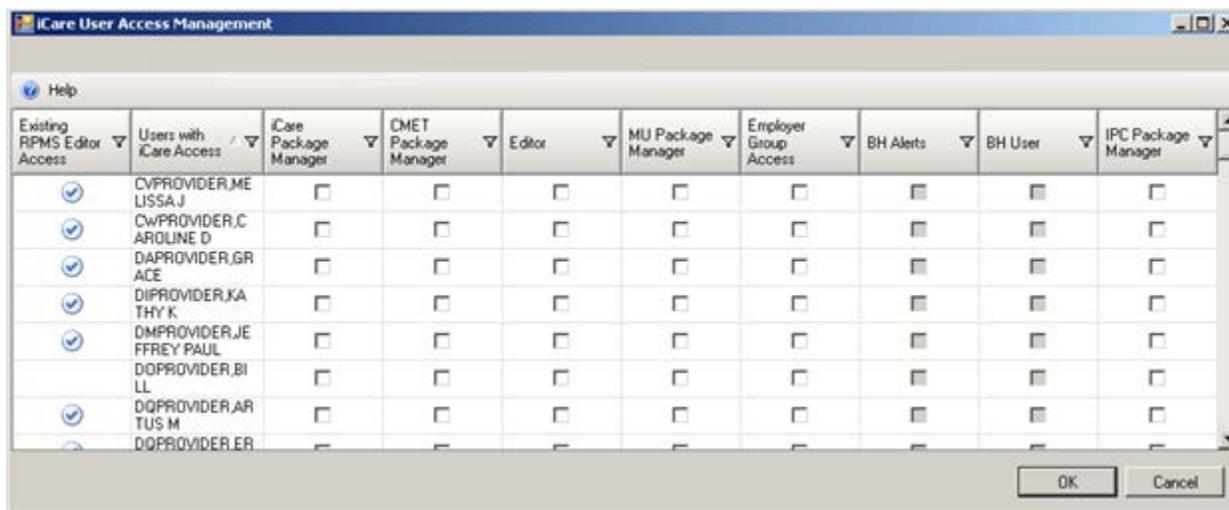


Figure 6-17: Sample **iCare User Access Management** dialog

For those with the appropriate permissions, you 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. If you want to remove an assigned role, de-select the particular check box.

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, Editor and MU Package Manager permissions. The Employer and BH ones work differently due to the sensitive nature of the patients involved.

6.4.1.1 Existing RPMS Editor Access

The users displayed on this list (those with the iCare user icon (☑) in first column) have been given existing Editor or Manager level key(s) to at least one of the following case management applications: (1) Case Management System (ACM), (2) Diabetes Management System (BDM), (3) HIV Management System (BKM), (4) Immunization (BI), (5) Patient Chart Problem List, and/or (6) Women's Health (BW).

6.4.1.2 Help Menu

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

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 require basic iCare access for other users.

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

6.4.1.3 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.

6.4.1.4 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 has triggered the Community Alerts. This person also assigns Editor access to other users. In addition, this person can assign the CMET Package Manager role.

6.4.1.5 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.

6.4.1.6 Editors

Editors in iCare will have read/write access to: (1) PCC Historical Data Entry; (2) Care Management data; (3) Family History and Reproductive Factors (Snapshot); (4) Designated Specialty Provider Management system (DSPM); (5) Problem List; and (6) CMET Worksheet.

The Editor role will give the person the right to edit the care management function (e.g., HMS Care Management). It also allows the person to enter Historical Data.

6.4.1.7 MU Package Manager

The MU Package Manager has the ability to establish site parameters related to the display of types of Providers on the MU tabs in iCare.

6.4.1.8 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.

6.4.1.9 BH Alerts

Exclude non-BH alerts.

6.4.1.10 BH User

User with existing BH access. This cannot be edited from iCare screens.

6.4.1.11 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.

6.4.2 Reassign Panels

The Reassign Panels option displays the Reassign Panels dialog.

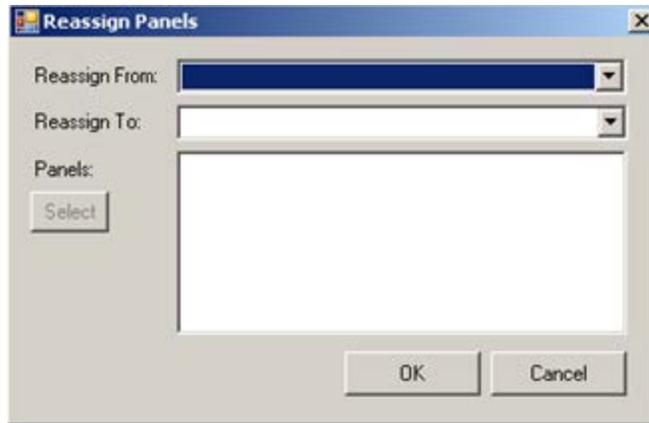


Figure 6-18: **Reassign Panels** Dialog

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

Reassign From: select the user from the drop-down list, whose panels you want to reassign.

Reassign To: select the user from the drop-down list, to whom the panels are to be reassigned.

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

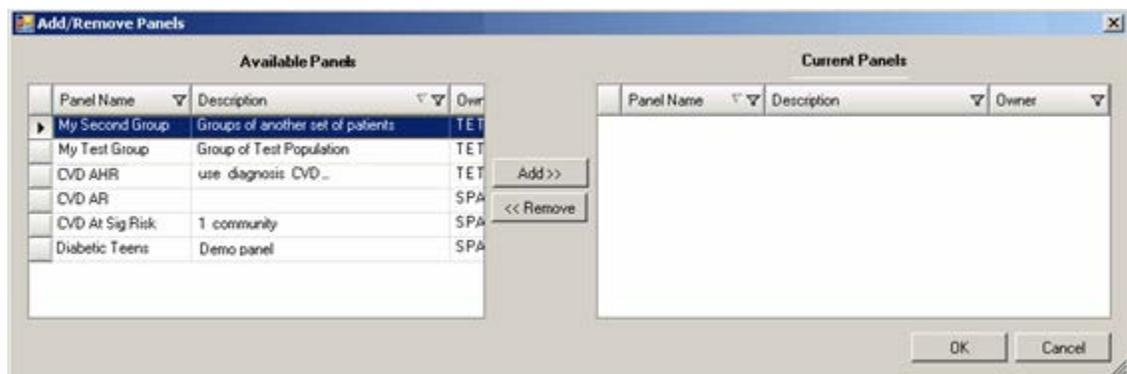


Figure 6-19: Sample **Add/Remove Panels** dialog

After the [Add/Remove](#) dialog is complete, click **OK** and 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 appear in the “Reassign To” user panel view. (Otherwise, click **Cancel**.)

6.5 iCare Taxonomy View/Edit

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

You access the iCare Taxonomy View/Edit dialog by either selecting **Tools | Taxonomy Maintenance | View/Edit Taxonomy Entries** (on the main iCare **Tools** menu).

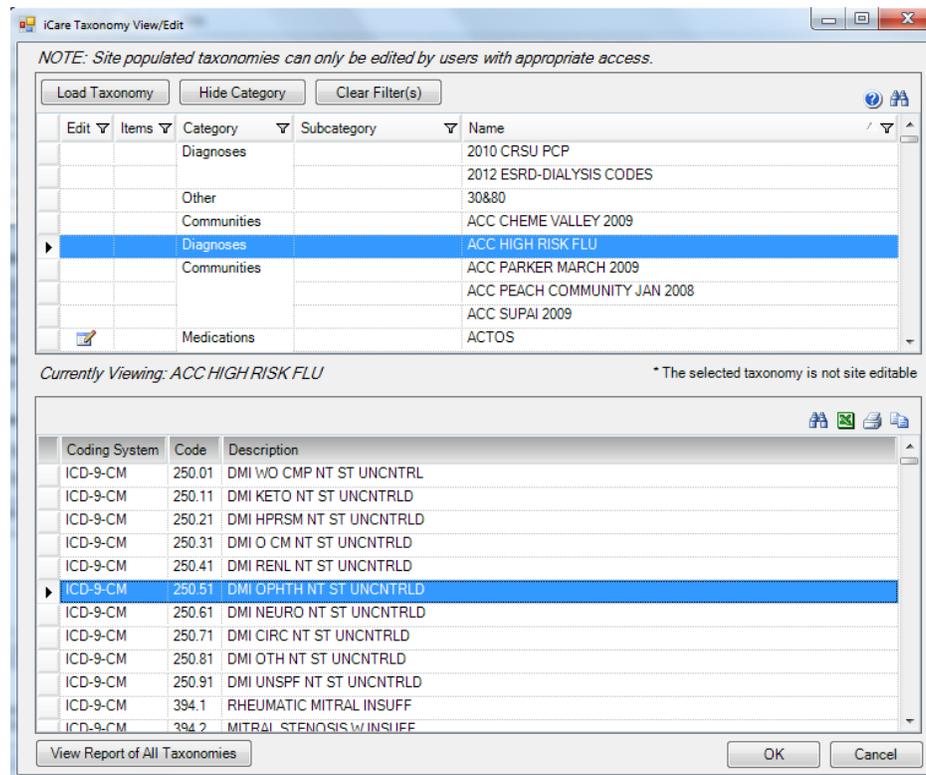


Figure 6-20: Sample iCare Taxonomy View/Edit dialog

Note: If you do not hold that security key, you can only view the information on the dialog. The following information displays: You do not currently have access rights to edit taxonomies. In order to edit taxonomy entries, you will need to have the iCare Taxonomy Editor security key (BQIZTXED) added to your RPMS user account.

When you first access this view/edit dialog, all parts of the tree structure will be collapsed. You need to expand one of the tree parts and find the taxonomy you want to edit.

In general, select the taxonomy from the list in the left group box that you want to view. This causes the **Add** and **Remove** buttons to appear 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 when this condition exists. Site populated taxonomies can only be edited by users with appropriate access.

The difference between the Apply and OK is: the **Apply** button is used when you add more than one taxonomy value to the **iCare Taxonomy View/Edit** dialog.

6.5.1 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.

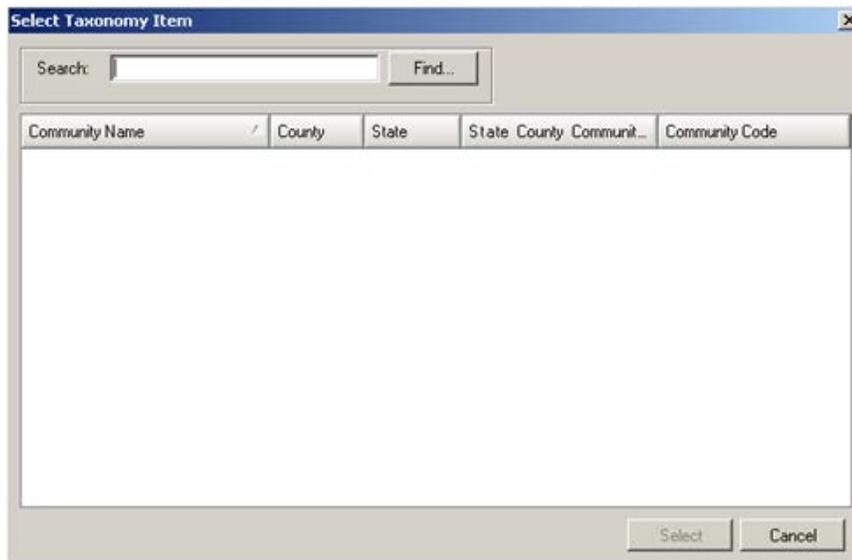


Figure 6-21: **Select Taxonomy Item** dialog

Use the Search field to search for a taxonomy item. Highlight the item you want to add and click **Select**. The application checks to see if it is already there.

- If it already exists, you receive a warning message about that (click **OK** to dismiss the message); after clicking **OK**, you return to the **iCare Taxonomy View/Edit** dialog.
- If it does not exist, it appends the selected item to the bottom of the list.

After you finish adding taxonomy values, click **Apply** to “save” your changes. If you do NOT click **Apply** and try to move to another taxonomy or another part of the iCare application, the **Save Taxonomy changes?** information message displays, asking if you want to apply the changes now. In this case, click **Yes** to apply the changes (otherwise, click **No**).

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

6.5.2 Remove Taxonomy Values

If you want to remove one or more items from the list, highlight them and click **Remove**. The **Confirm taxonomy item remove message** displays. Click **Yes** to remove the items (otherwise, click **No**). You remain on the **iCare Taxonomy View/Edit** dialog.

6.5.3 View Report of All Taxonomies Button

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

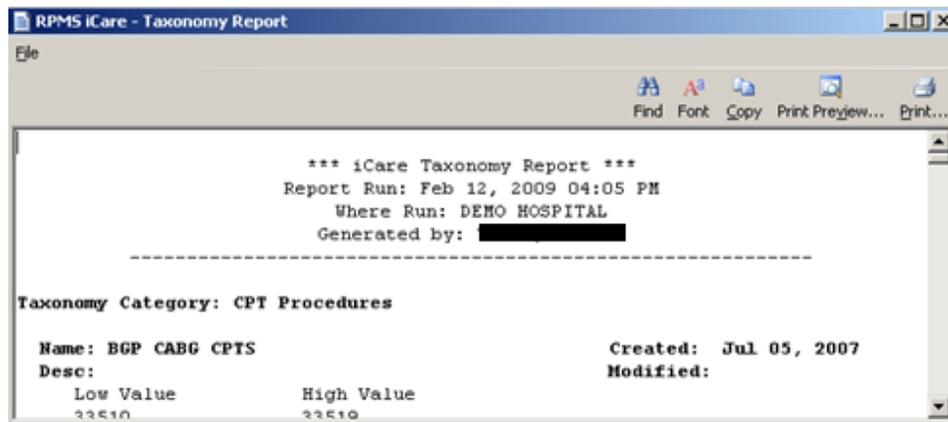


Figure 6-22: **Taxonomy Report**

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

Section 6.6 for information about the File menu and buttons on the pop-up.

6.6 Pop-up Functionality

Several places in iCare you will be viewing a pop-up. For example, if you double-click on any row in the **Recent Visits** group box on the **Cover Sheet** of the **Patient Record** window, you will view a pop-up.

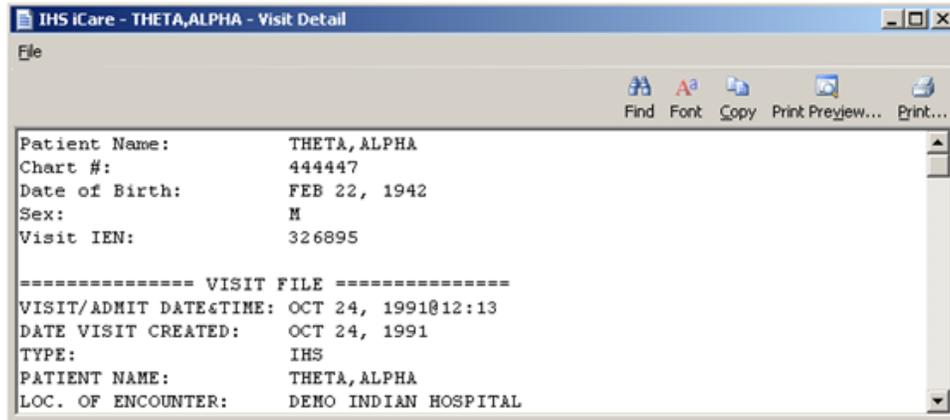
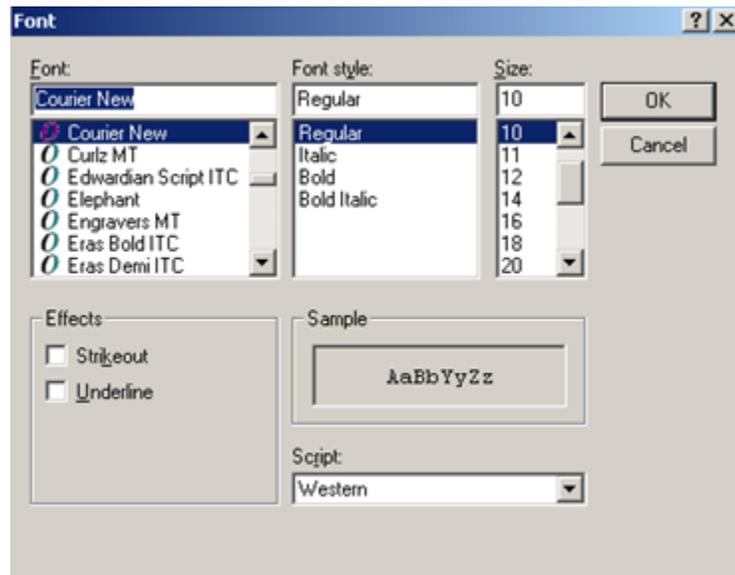


Figure 6-23: Sample Visit Detail pop-up

You can take the following actions on this pop-up:

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

Figure 6-24: **Font** dialog

Here you can change the Font name, style, and size of the text in the pop-up (applies to all of the text). In addition, you can add effects like **Strikeout** and **Underline** - these perform like those effects indicated in MS Word.

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

Click **OK** to apply your 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](#). You can print the contents of the pop-up from this dialog.
- Click the **Print** () button to display a print dialog where you specify the printer to output the contents of the pop-up, 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 (dismisses the pop-up).

6.7 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.

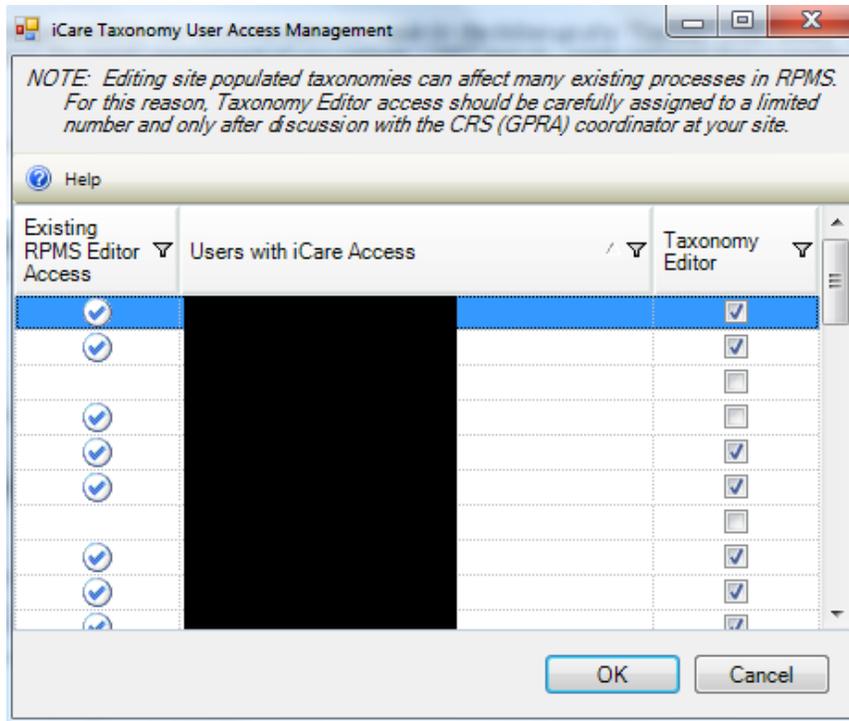


Figure 6-25: **iCare Taxonomy User Access Management** for Taxonomy Editor

Each of the column headings has hover help.

6.7.1 Existing RPMS Editor Access

The users with the iCare user icon (☑) in 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).

6.7.2 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.

6.7.3 Taxonomy Editor

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

6.7.4 Help Menu

The following information displays when you click 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 require basic iCare access for other users.

6.8 Change RPMS Server/Login

The **Change RPMS Server/Login** option appears on the **File** menu. Select this option to access the **iCare 2.4 Login** dialog.

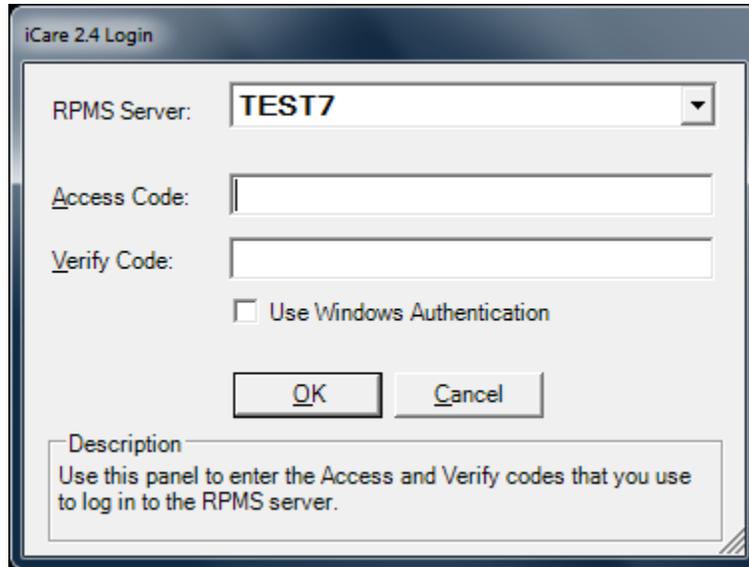


Figure 6-26: Sample **iCare 2.4 Login** dialog

RPMS Server

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

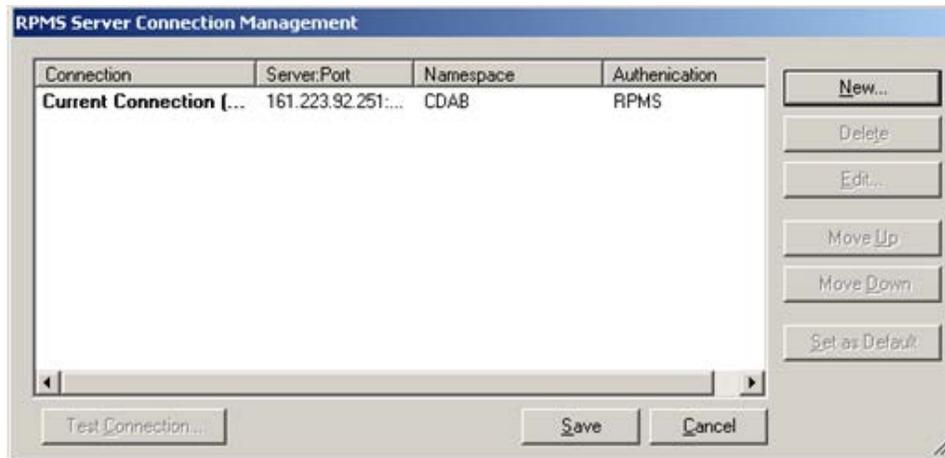


Figure 6-27: **Sample RPMS Server Connection Management** dialog

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.

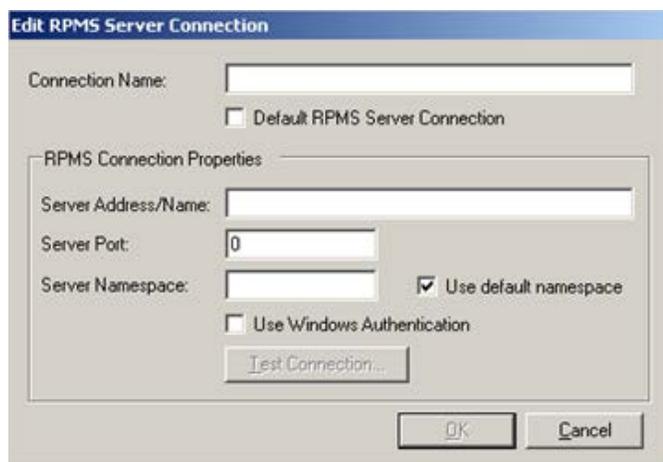


Figure 6-28: **Edit RPMS Server Connection** dialog

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 appear 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. Your Site Manager will provide this information.

Server Port

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

Server Namespace

If your site has multiple databases on one server, you will additionally need to type the namespace, which is typically a text string, e.g., DEVEH.

Use default namespace

Select this check box if the Server Namespace is the default one you want to use.

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 then click **OK**.

- After clicking **OK**, if the connection is correct, the application display the Connection Test message that states: 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 appear 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.

6.9 iCare Site Parameter Options

You access the **iCare Site Parameters** on the **Tools** menu.

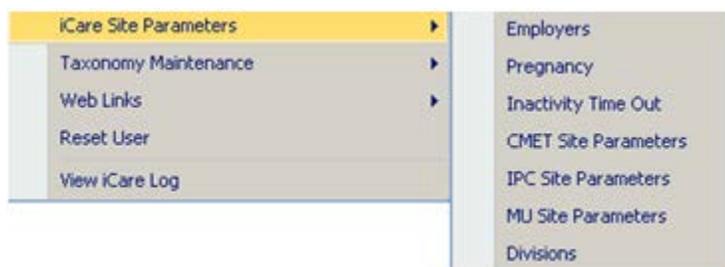


Figure 6-29: **iCare Site Parameter** options

6.9.1 CMET Site Parameters

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.

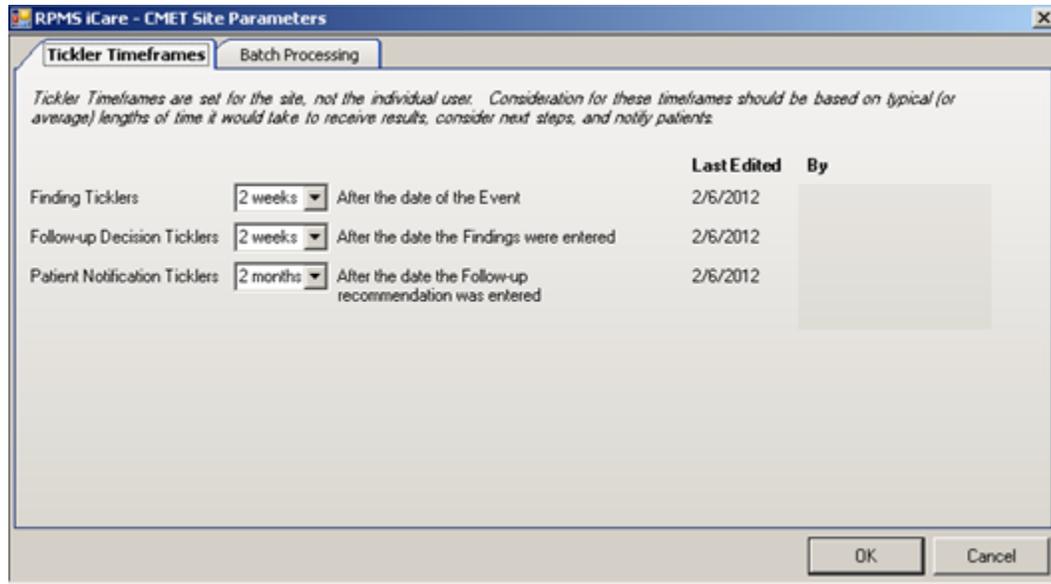


Figure 6-30: Sample **RPMS iCare – CMET Site Parameters** dialog

Tickler Timeframes

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

Each field has a drop-down list from which to select an option. When a timeframe date is passed and the step has not been entered, the Tickler will be displayed.

After you change one or more settings and click **OK** and the application populates the Last Edited field with the date, and the By field with 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, based on the event date. The Tickler is initiated from the date of the event.
- Follow-up Decision Ticklers. Ticklers are initiated from the date the Findings were entered.
- Patient Notification Ticklers. Ticklers are initiated from the date the Follow-up recommendation is entered.

Timeframes 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 timeframe and notification type for the Pap Smear and Mammogram Screening events with normal results. In addition, you can set the type of Normal Finding for the Mammogram Screening event.

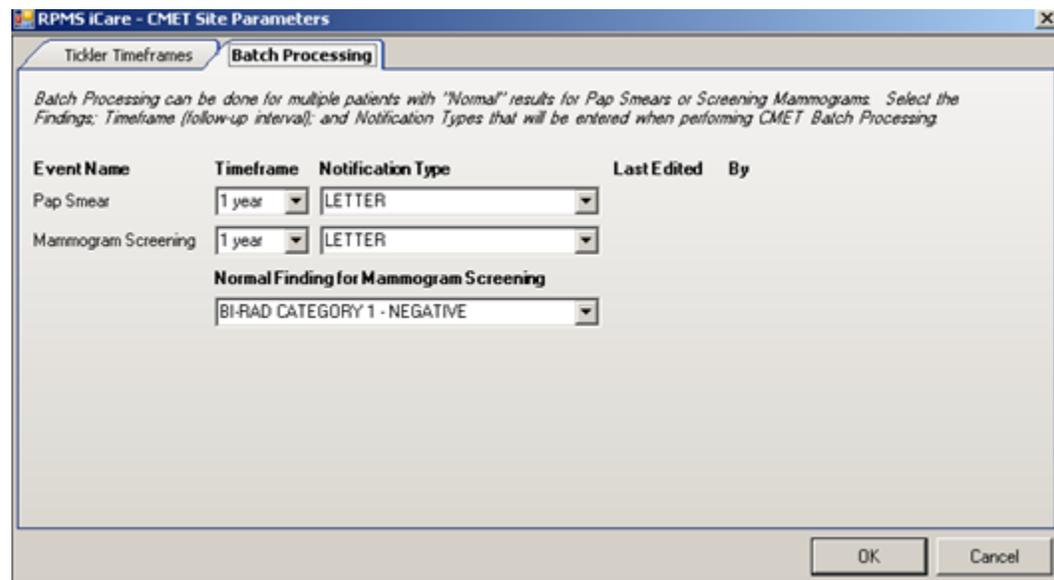


Figure 6-31: Sample **Batch Processing** tab

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 determine what is a “normal” finding.

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

After you change one or more settings and click **OK** and 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**.)

6.10 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 appears on the **Tools** menu. Select it to access the **Template Management** dialog.

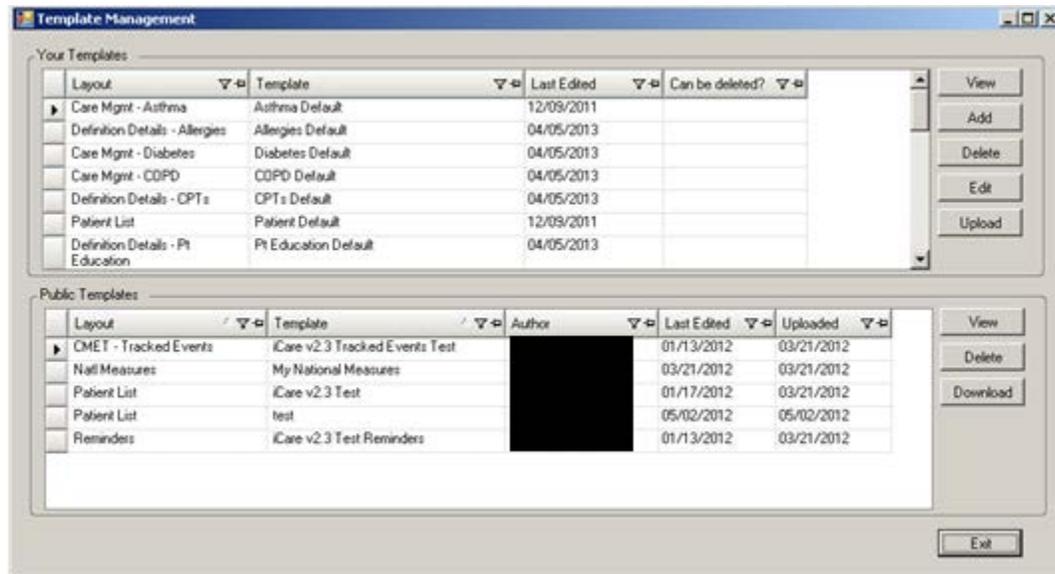


Figure 6-32: Sample **Template Management** dialog

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 **Your Templates**.

6.10.1 View

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

6.10.2 Upload

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

6.10.3 Download

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

6.10.4 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 then click **Delete**. The **Delete Template** information message displays confirming the deletion. Click **Yes** to delete (otherwise, click **No**.)

6.10.5 Edit

The **Edit** action is available in the **Your Templates** group box. Select a template to edit and then click **Edit**. You access the template of columns for the selected template. Section 6.11.6.1 provides information about how to use this template.

6.10.6 Add

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

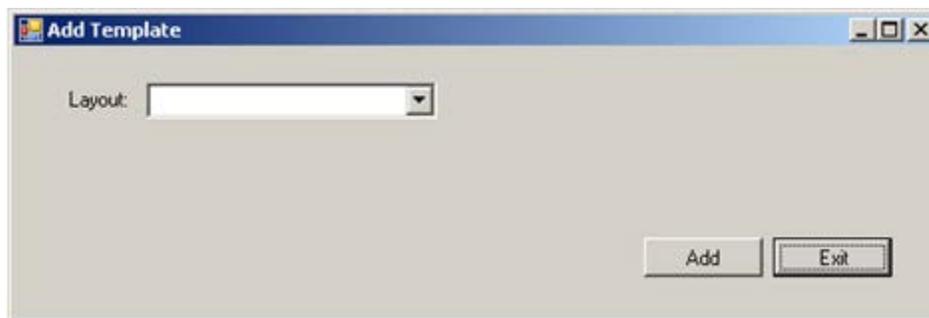


Figure 6-33: **Add Template** dialog

Layout: Select an option on the **Layout** drop-down list to specify the layout to be used for the new template.

After populating the **Layout** field, the **Template Name** field appears.

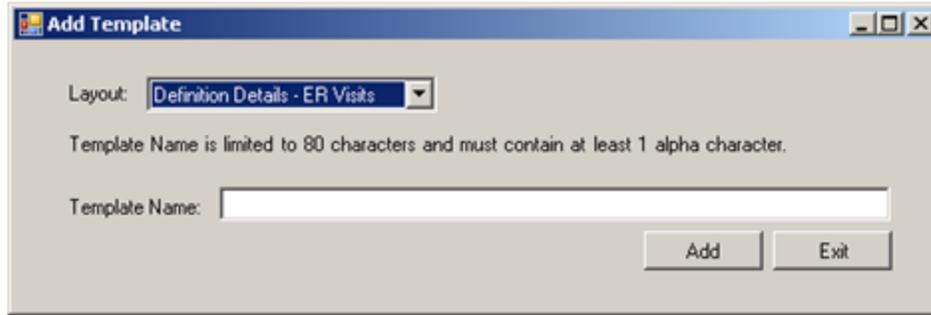


Figure 6-34: **Add Template** dialog with added field

Template Name: Type the name of the template in this Free Text field, limited to 80 characters and must contain at least 1 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**.)

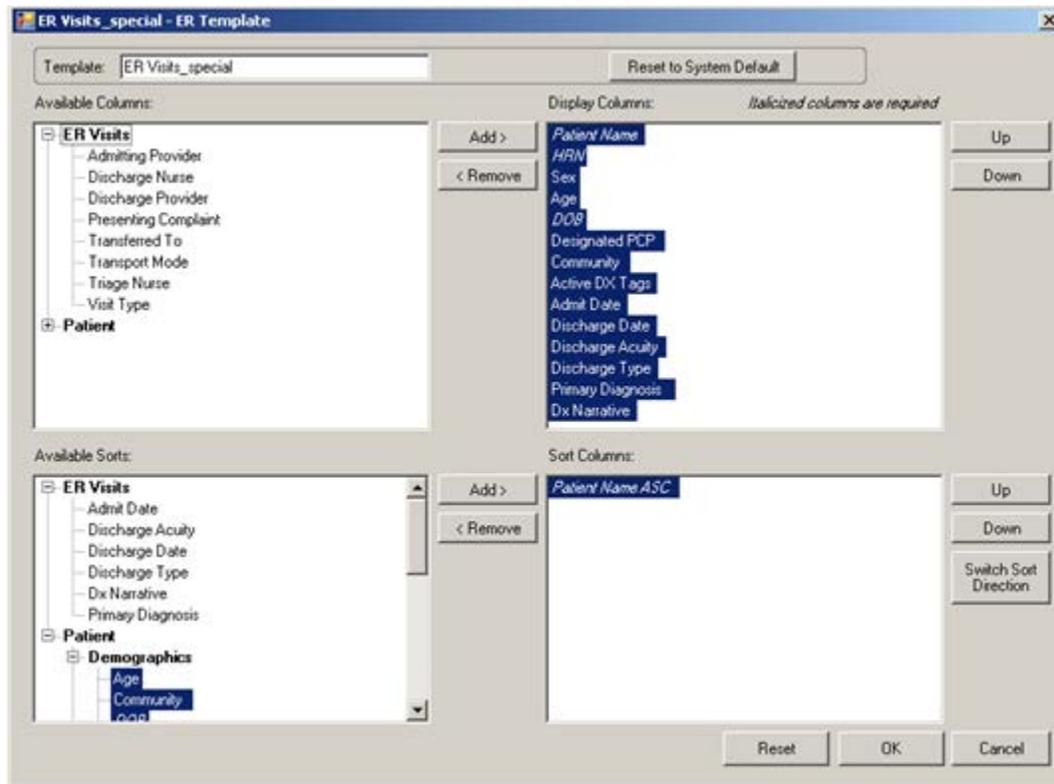


Figure 6-35: Sample template for new template created

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

If you changed several things about the columns on the template and you want to “undo” those changes, click **Reset**.

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

6.10.6.1 Display and Available Columns

Use the **Display Columns** to determine what columns you want to display for the particular window or tab.

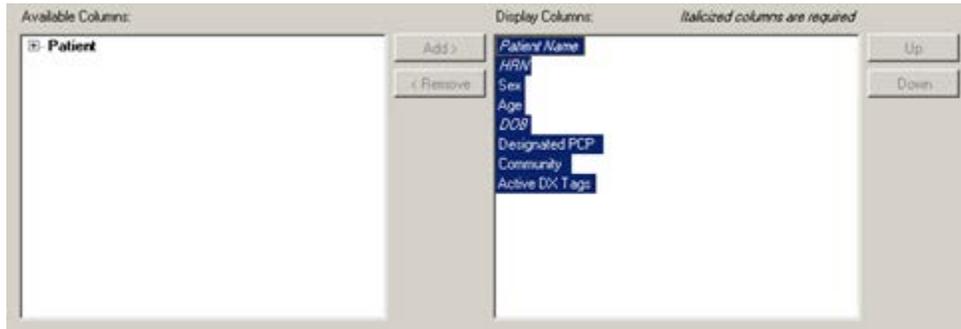


Figure 6-36: Sample **Display** and **Available** columns

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 not 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, you can 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: You cannot remove any column names in italics.

You can 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. You might have to click the button more than once to move it to the desired location.

6.10.6.2 Columns to Sort

Sorting a column means you want to arrange the items in the column in alphanumeric order.



Figure 6-37: Sample **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, you can 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: You cannot remove any column names in italics.

6.10.6.3 Column Sort Order

You use the **Sort Columns** area to determine what columns you want to sort for the particular window or tab.

You determine which order 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. You might have to click the button more than once to move it to the desired location. For example, if you have Gender, Patient Name, and Diagnosis Tags in the right column, the Gender sort is applied first then the Patient Name and then the Diagnosis Tags is last.

6.10.6.4 Switch Sort Direction

The names of columns in the **Sort Columns** area show “ASC” appended to the name, for example Patient Name ASC. You can 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. You can use the “switch sort direction” action on more than one column.

Glossary

Context Menu

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

Designated Primary Care Provider (DPCP)

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 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.

If you need a change or addition to an existing taxonomy, please see your 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
BQI	Namespace for iCare
CQM	Clinical Quality Measures
GUI	Graphical User Interface
HHS	Health and Human Services
IHS	Indian Health Service
IPC	Improving Patient Care
MU	Meaningful Use
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 OIT Help Desk (IHS).

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

Web: <http://www.ihs.gov/helpdesk/>

Email: support@ihs.gov