



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **iCare Population Management GUI**

(BQI)

## **National Measures User Manual**

Version 2.4  
June 2015

Office of Information Technology (OIT)  
Division of Information Technology

# Table of Contents

<b>1.0</b>	<b>Introduction.....</b>	<b>1</b>
1.1	Background .....	1
1.2	iCare Graphical User Interface .....	1
1.3	Who Should Use iCare? .....	2
1.4	Features Introduced in Version 2.4.....	2
1.4.1	ICD-10 Updates.....	3
1.4.2	Non ICD-10 Updates .....	4
<b>2.0</b>	<b>Nat'l Measures Window .....</b>	<b>6</b>
<b>3.0</b>	<b>Nat'l Measures Layout .....</b>	<b>7</b>
<b>4.0</b>	<b>Nat'l Measures Toolbar .....</b>	<b>9</b>
4.1.1	Background Jobs.....	9
4.1.2	Graph It! Button .....	9
<b>5.0</b>	<b>Nat'l Measures Menus.....</b>	<b>11</b>
5.1	File Menu.....	11
5.2	Edit Menu .....	12
5.3	View Menu.....	12
5.4	Tools Menu.....	12
<b>6.0</b>	<b>iCare Features Used by Nat'l Measures .....</b>	<b>14</b>
6.1	User Preferences.....	14
6.2	Graphing Measurement Data .....	15
6.2.1	Chart Data Group Box.....	16
6.2.2	Chart Options Group Box .....	16
6.2.3	File Menu for Charting Window .....	18
6.3	Background Jobs .....	20
6.4	Print Preview .....	21
6.5	iCare Package Manager Functions.....	24
6.5.1	iCare User Access Management.....	24
6.5.2	Reassign Panels.....	27
6.6	Taxonomy Maintenance Functions.....	29
6.6.1	View Taxonomy Entries.....	29
6.6.2	Taxonomy User Access.....	32
6.7	Pop-up Functionality .....	33
6.8	Change RPMS Server/Login .....	34
6.9	iCare Site Parameter Options.....	37
6.9.1	Employers.....	37
6.9.2	Pregnancy .....	38
6.9.3	Inactivity Time Out.....	39
6.9.4	CMET Site Parameters.....	40
6.9.5	IPC Site Parameters.....	42

---

6.9.6	MU Site Parameters .....	44
6.9.7	Divisions .....	46
6.10	Manage Templates .....	47
6.10.1	View.....	48
6.10.2	Upload.....	48
6.10.3	Download .....	48
6.10.4	Delete .....	48
6.10.5	Edit .....	49
6.10.6	Add.....	49
<b>Glossary.....</b>		<b>53</b>
<b>Acronym List .....</b>		<b>54</b>
<b>Contact Information .....</b>		<b>55</b>

## Preface

The purpose of this manual is to provide you with the needed information to use the latest enhancements to the Panel List window 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 show you how to perform activities related to the Panel Definition window in the latest version of the iCare application.

For more information about iCare basic functionality, iCare usage, or training for iCare, you may 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](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](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](mailto: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.

The information included in this National Measure specific manual covers iCare National Measure specific functionality in iCare Version 2.4. 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 Nat'l Measures Window

The Nat'l Measures window displays IHS national clinical performance measures 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.

The data on the Nat'l Measures window applies to the division of the facility the user is logged into.

Category	Clinical Group	Measure Name	# Patients in Denominator	# Patients in Numerator	% Met	2015 Goal	IHS Current National Performance	Healthy People 2020 Goals
<b>Developmental</b>	<b>Behavioral Health</b>	Alcohol Screen: 12-75 (Dev)	5,648	1	0.0%			
		Alcohol Screen: Females 15-44 (Dev)	1,912	1	0.1%			
		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%			
		IPV/DV Screening, Counseling, Diagnosis or Procedure Females 15-40 (Dev)	1,912	0	0.0%			
	<b>Cancer-Related</b>	Comprehensive Cancer Screening (Dev)	2,922	422	14.4%			
	<b>Other Clinical</b>	Hepatitis C Screening	1,547	293	18.9%			
		Weight Assessment & Counseling (3-17)	1,934	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%			
	<b>STI-Related</b>	STI: HIV Screen: 13-64 (Dev)	4,966	7	0.1%			
		STI: HIV Screens: Count (Dev)		16				
<b>National GPPRA</b>	<b>Behavioral Health</b>	Alcohol Screen Females 15-44	1,787	1	0.1%	66.7%	66.0%	N/A
		Depression: Diagnosis Only 18+	5,035	2	0.0%			
		Depression: Screening Only 18+	5,035	14	0.3%			
		Depression: Screening or Diagnosis 18+	5,035	14	0.3%	64.3%	66.0%	N/A
		IPV/DV Screen Females 15-40	1,632	0	0.0%	61.6%	63.5%	N/A
	<b>Cancer-Related</b>	Colorectal Cancer Screen 50-75	1,720	204	11.9%	35.2%	37.5%	70.5%
		Colorectal Cancer Screen 50-75: FOBT/FIT	1,720	0	0.0%			
		Mammogram Rates 52-64	564	24	4.3%	54.8%	54.2%	81.1%
		Pap Smear Rates 24-64	1,793	352	19.6%	54.6%	54.6%	93.0%
		Tobacco Cessation: Counseling or RX	523	2	0.4%		45.0%	

Figure 2-1: Sample Nat'l Measures window

The data was updated on the date shown below the window's toolbar.

### 3.0 Nat'l Measures Layout

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	1	0.0%					
		Alcohol Screen: Females 15-44 (Dev)	1,912	1	0.1%					
		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%					
		IPV/DV Screening, Counseling, Diagnosis or Procedure Females 15-40 (Dev)	1,912	0	0.0%					
		Cancer-Related	Comprehensive Cancer Screening (Dev)	2,922	422	14.4%				
			Other Clinical	Hepatitis C Screening	1,547	293	18.9%			
				Weight Assessment & Counseling (3-17)	1,934	1	0.1%			
		Weight Assessment & Counseling (3-17): BMI		1,934	9	0.5%				
		STI-Related	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					
	National GPRA	Behavioral Health	Alcohol Screen Females 15-44	1,787	1	0.1%	66.7%	66.0%	N/A	
			Depression: Diagnosis Only 18+	5,035	2	0.0%				
			Depression: Screening Only 18+	5,035	14	0.3%				
			Depression: Screening or Diagnosis 18+	5,035	14	0.3%	64.3%	66.0%	N/A	
			IPV/DV Screen Females 15-40	1,632	0	0.0%	61.6%	63.5%	N/A	
Cancer-Related		Colorectal Cancer Screen 50-75	1,720	204	11.9%	35.2%	37.5%	70.5%		
		Colorectal Cancer Screen 50-75: FOBT/FIT	1,720	0	0.0%					
		Mammogram Rates 52-64	564	24	4.3%	54.8%	54.2%	81.1%		
		Pap Smear Rates 24-64	1,793	352	19.6%	54.6%	54.6%	93.0%		
		Tobacco Cessation: Counseling or RX	523	2	0.4%					

Figure 3-1: Sample columns on the Nat'l Measures window

The Nat'l Measures window has the following data columns:

**Category:** the name of the category, Developmental, National GPRA, Non-National, Other, or Other National.

**Clinical Group:** the name of the clinical performance group.

**Measure Name:** the measure title derived from the Summary Report. There is hover help when you move your mouse over a cell in this column.

**# Patients in Denominator:** the total number of patients in this measure who meet the denominator definition.

**# Patients in Numerator:** the total number of patients in this measure who meet the numerator definition.

**% Met:** the percentage of the panel who meet the measure, derived by dividing the denominator total by numerator total.

**year Goal:** the value will be the same as the one that displays in the "GPRA" column on the Summary Page from the CRS National GPRA report. The "year" is the most recent year with final goals recorded.

**IHS Current National Performance:** the value will be the same as the one that displays in the “Nat’l” column on the Summary Page from the CRS National GPRA report.

**Healthy People 2020 Goals:** the value represents the percentage of Health People 2020 goals met for the particular measure.

You can sort and/or filter any column, re-arrange the order of the columns, etc.

## 4.0 Nat'l Measures Toolbar



Figure 4-1: Toolbar of Nat'l Measures window

**Division:** the option selected for this field determines what division (or all divisions) data is displayed on the window.

The data on the Nat'l Measures window applies to the name of the facility logged into.

The toolbar buttons and menu options determine what actions you can take on this window.

### 4.1.1 Background Jobs

Click the Background Jobs () button (or select **File | Background Jobs**) to display the **Background Jobs** pop-up.

### 4.1.2 Graph It! Button

Use the Graph It! Button (or select **File | National Measures | Graph It!** or select **Tools | Graph It!**) to produce a graph of selected rows in the grid.

After clicking the button, the application displays the **Charting – National Measures** window.

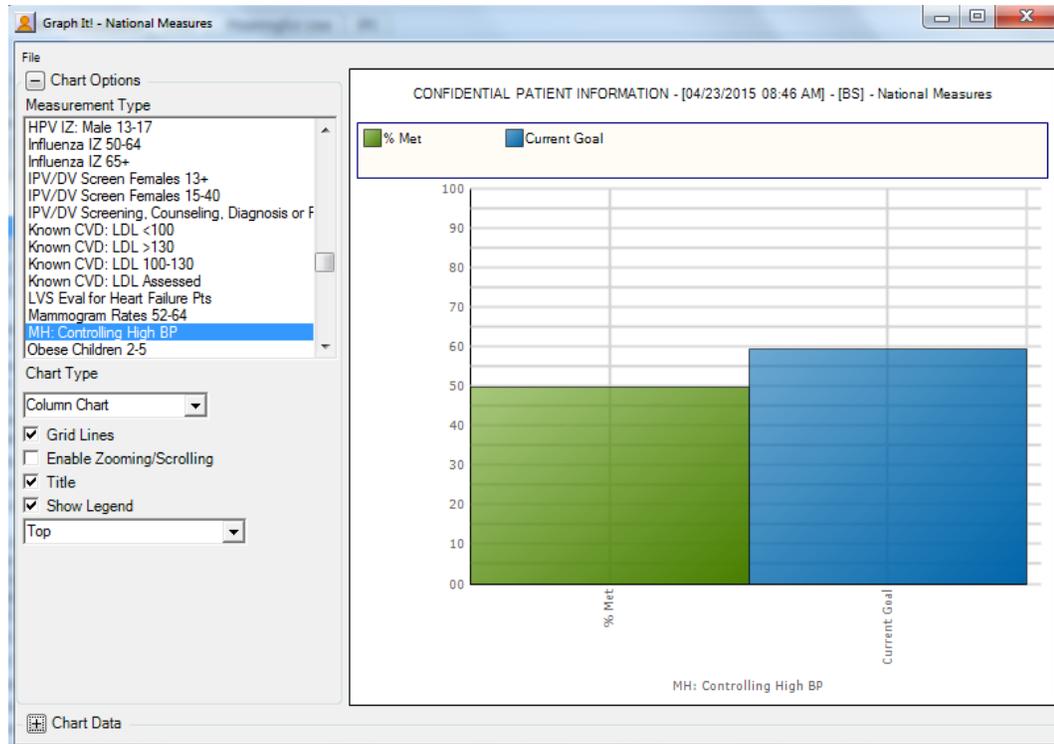


Figure 4-2: Sample Charting – National Measures window

The graph has the following features:

The x-axis is the % Met and the Current Goal.

The y-axis shows the percentage data range.

Section 6.2 provides more information about graphing measurement data.

## 5.0 Nat'l Measures Menus

This section reviews the View, File, Edit, Tools menus.

### 5.1 File Menu

Below are the options on the File menu:

**National Measures:** The sub-menus for this option contain the following actions:

- Graph It! is used to graph selected measurements.
- Glossary is used to access the National Measures Glossary.
- Reset View is used to return the current view to the default view. Use this feature when you change the view, such as resize the column width. This is the same as using the Ctrl+R key combination.
- Refresh is used to update any RPMS field values on the current window with new data from the server. This is the same as pressing the F5 key on your keyboard.

**Change RPMS Server/Login:** [This option](#) allows you to change the server information and 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:** The 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 information about the selected rows in the grid to the printer using the settings in Page Setup.

**Background Jobs:** This option displays the [Background Jobs](#) pop-up. This pop-up displays, for example, the start and end dates for the nightly 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 locks the iCare application by displaying the “iCare locked by user” dialog. You can do two things on this dialog:

- Resume working on the iCare application by entering your verify code and then clicking **Resume**.
- Logout of the iCare application by clicking **Logout**.

## 5.2 Edit Menu

The Edit menu has the following options:

**Select All:** This option is used to select all of the rows in the grid. This is the same as using the key combination Ctrl+A.

**Deselect All:** This option used to deselect all of the currently selected rows in the grid.

## 5.3 View Menu

The View Menu on Nat'l Measures has one option:

**Split View:** Select Split View to have the current view in the split view with Panel List in the left pane and the other tabs in the right panel. You can change to the Panel List view by removing the checkmark; this is a temporary setting. When you exit iCare and reopen iCare, the settings set under User Preferences for the default screen are used.

## 5.4 Tools Menu

The Tools menu options are:

**Graph It!:** This option allows you to graph selected measurements. This is the same as using the Graph It! button (or by selecting **File | National Measures | Graph It!**)

**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.

**Glossary:** This option accesses the National Measures glossary. This is the same as selecting **Help | Natl Measures Glossary**.

The **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 allows you to manage the templates for various parts of the application. Select this option to access the Template Management dialog. Section 6.10 provides information about managing templates.

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

**View iCare Notifications:** This option opens the iCare Notifications pop-up that provides information about various notifications that have been sent.

**iCare Package Manager:** This option is active for those users with Package Manager security key. Section 6.5 provides information about the iCare Package Manager Functions.

**iCare Site Parameters:** This option access several iCare site parameters.

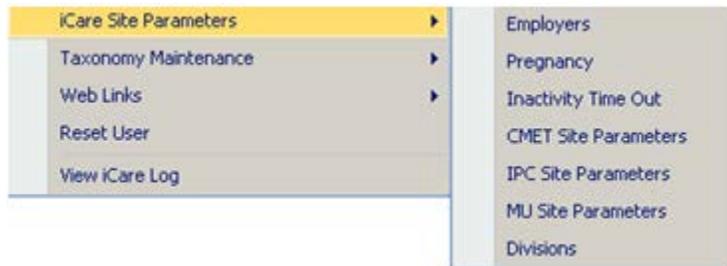


Figure 5-1: iCare Site Parameters options

The options provide dialogs where you can establish the various parameters. Section 6.9 provides information the iCare Site Parameter options.

**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 Taxonomy Entries:** this feature displays the **iCare Taxonomy View/Edit** dialog. Section 6.6.1 provides information about the iCare Taxonomy function.

**Taxonomy User Access:** this feature is active for those user with the proper security key. Selecting this option displays the **iCare Taxonomy User Access Management** dialog. Section 6.6.2 provides information about this dialog.

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

## 6.0 iCare Features Used by Nat'l Measures

The following provides information about using the iCare features for the National Measures view.

### 6.1 User Preferences

This section focuses on the user preferences that are used by the National Measures window.

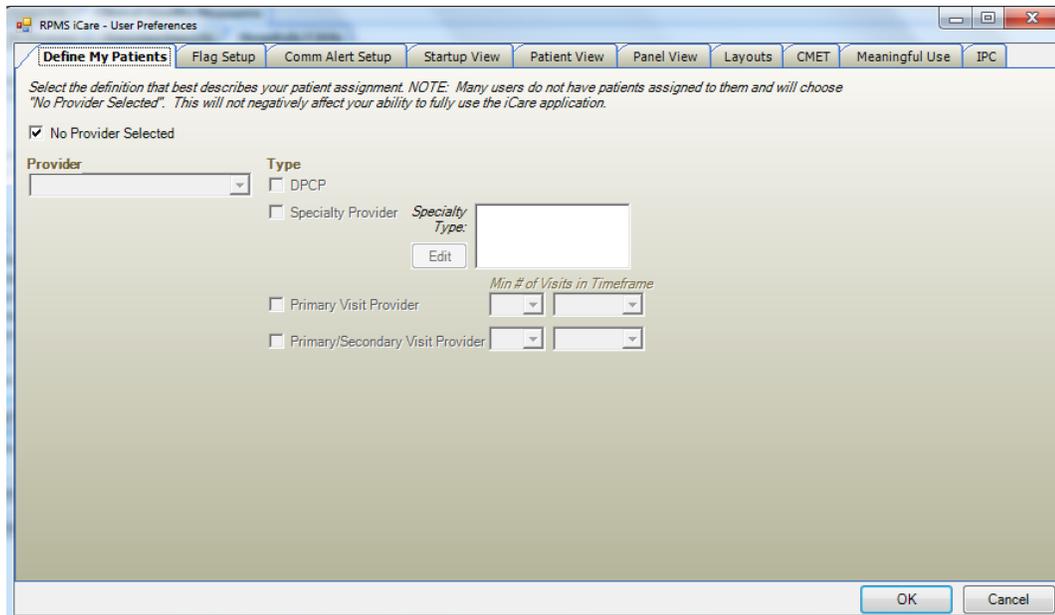


Figure 6-1: Sample User Preferences window

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**.)

#### Startup View Tab

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

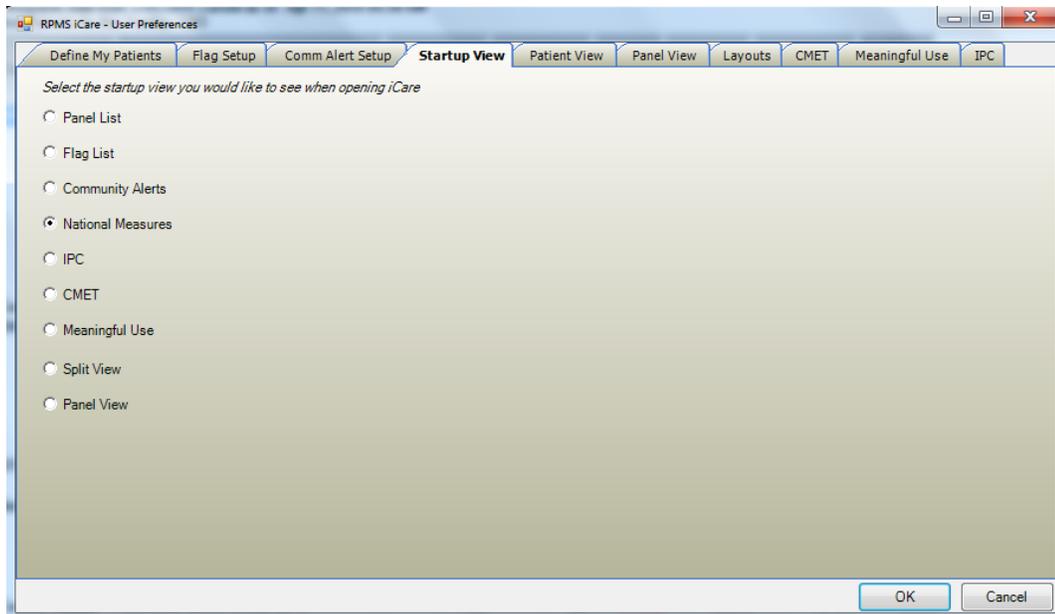


Figure 6-2: Sample Startup View tab on User Preferences

Select the **National Measures** radio button if you want the National Measures to be the first window to display when you access the iCare application.

## 6.2 Graphing Measurement Data

You can create a graph of selected measurement data on the Nat'l Measures window

by clicking the **Graph It!** () button. The application displays the Charting window, showing a graph of the particular measurement type.

The application creates a chart of the data. This type of graph shows trends over time.

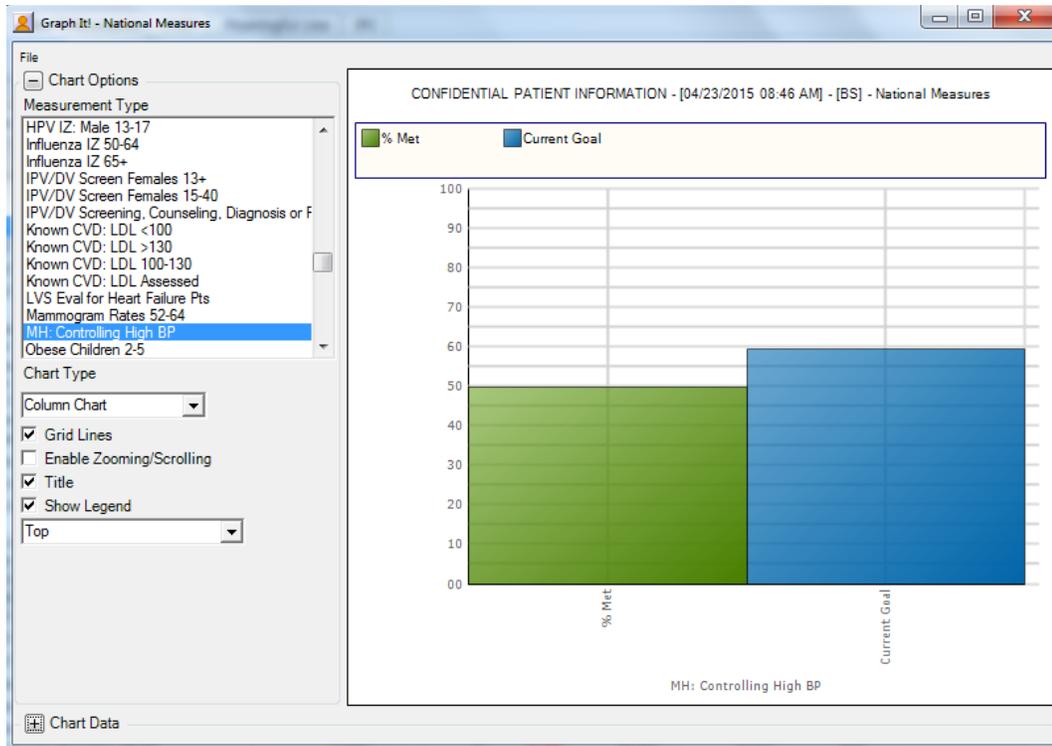


Figure 6-3: Sample Charting window

### 6.2.1 Chart Data Group Box

The **Chart Options** group box contains the data for the graph.

Measure Name	% Met	Current Goal
DM: Influenza IZ	0	0
DM: LDL 100-129	5.9	0
DM: LDL Assessed	17.6	71.8
DM: LDL Low <100	0	0
DM: Medical Nutrition Therapy	0	0
DM: Nephropathy Assessed	11.8	60.0
DM: Nutrition Education	5.9	0
DM: Prevalence (DX Ever)	21.2	0
DM: Retinal Evaluation	0	60.1
DM:Pneumovax IZ	52.9	0
Elder Fall Risk Assessment	0.1	0
Elder Functional Assessment	0.1	0

Figure 6-4: Sample Chart Data Group Box

The data is determined by what you select in the **Measurement Type** field. The buttons on this group box work like those buttons on the right side of the window.

### 6.2.2 Chart Options Group Box

What you select in the **Chart Options** group box determines what the graph looks like.

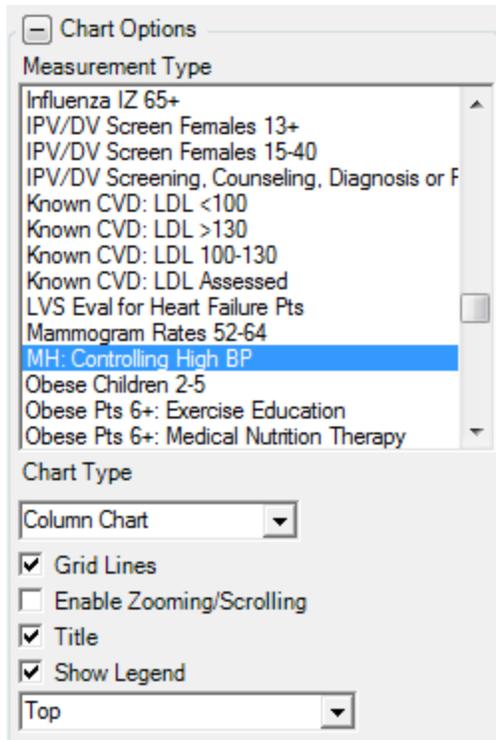


Figure 6-5: Sample Chart Options group box

**Measurement Type:** this shows what is being charted. You can change this by selecting one or more measurement types. As you select another measurement type, the graph changes.

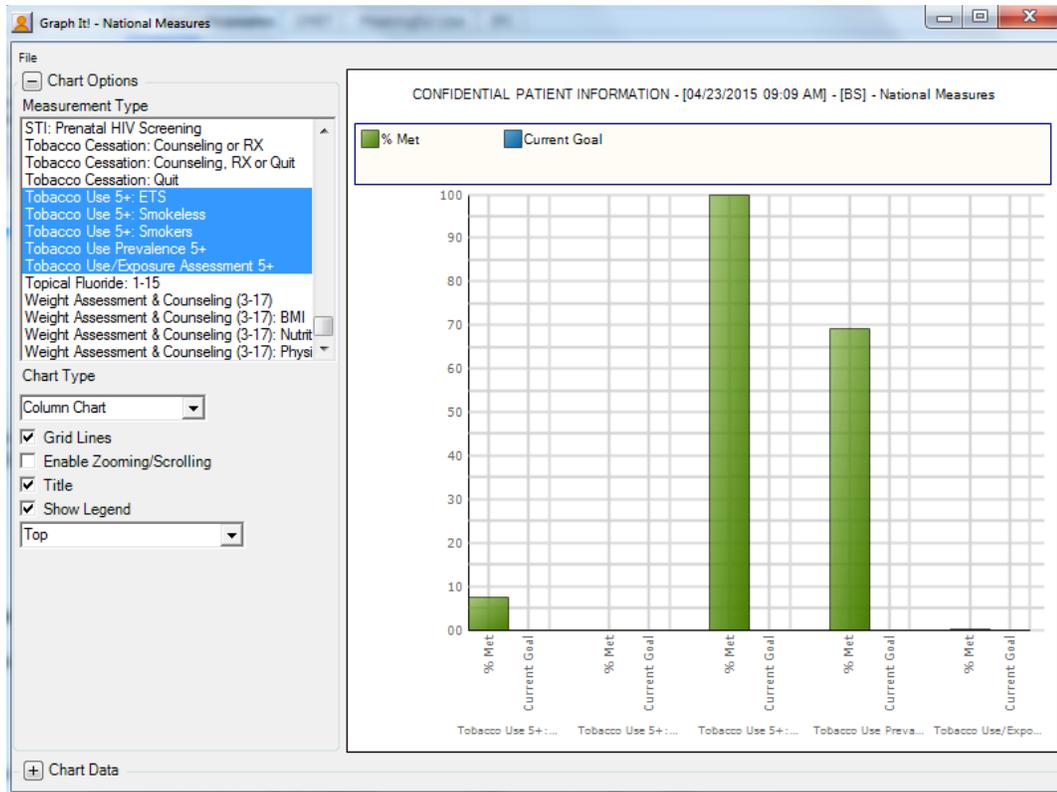


Figure 6-6: Graph changes BMI after selecting other measurement types

**Chart Type:** This option determines the type of chart (Column Chart is the default). You can change this by selecting an option from the drop-down list.

**Grid Lines:** Select this check box to display the grid lines on the chart.

**Enable Zooming/Scrolling:** Select this check box to display zooming/scrolling of the grid lines. This applies to non-3D graphs.

**Title:** Select this check box to show the title on the graph.

**Show Legend:** Select this check box to show the legend for the graph. The field below the “Show Legend” field determines the location of the legend.

### 6.2.3 File Menu for Charting Window

Below are the options on the **File** menu for the Charting window.



Figure 6-7: Options on File menu for the Charting window

Use the **Close** option to close the charting window.

### 6.2.3.1 Chart Option

The **Chart** option of the **File** menu has the following selections:

**Page Setup:** [this selection](#) allows you to set Margin, Paper, and Layout characteristics (like landscape or portrait orientation) for printing. You can select a different printer.

**Print Preview:** this selection displays the [Print Preview](#) dialog that displays how the output of the chart will look.

**Print:** this selection displays the Print dialog where you select the printer to output the chart. This is the same as using the Ctrl+P key combination.

**Save Chart for Office:** this selection lets you save the chart in a particular graphics format, for example JPEG. The application displays the **Save Chart for Office** dialog.

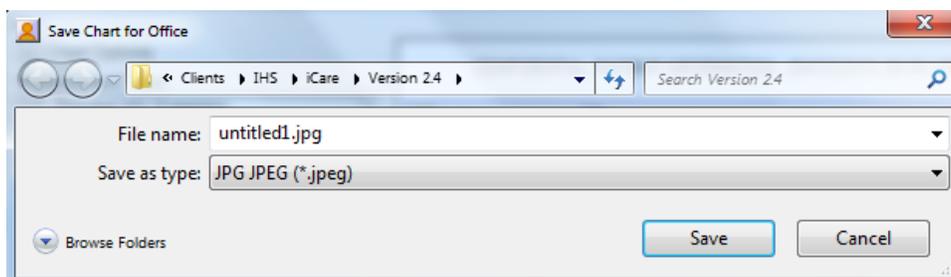


Figure 6-8: Save Chart for Office dialog for graphics format

**File Name:** specify the name of the file for the chart in graphics format.

**Save as type:** select the type of graphics format for the chart. The default is JPEG.

After completing the two fields, click **Save** to save the chart in graphics format (otherwise, click **Cancel**).

**Save Chart for PDF:** this selection lets you save the chart in PDF format. The application displays the **Save Chart for Office** dialog.

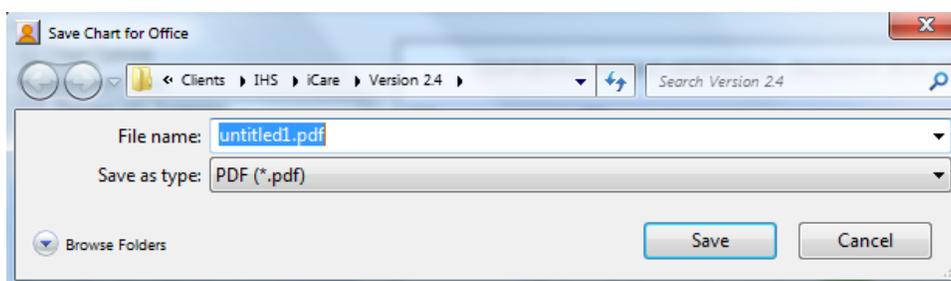


Figure 6-9: Save Chart for Office dialog for PDF format

**File Name:** specify the name of the file for the chart in PDF format.

**Save as type:** use the default PDF.

After completing the two fields, click **Save** to save the chart in PDF format (otherwise, click **Cancel**).

### 6.2.3.2 Table Option

The Table option of the File menu has the following selections:

**Search:** this selection searches for data in the **Chart Data** group box.

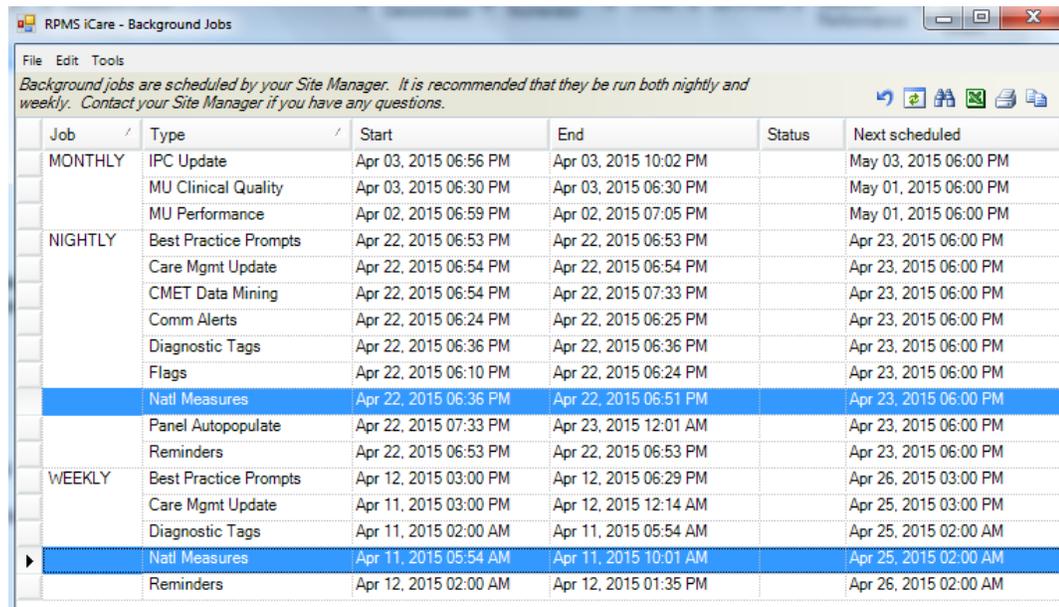
**Excel Export:** this selection exports the selected rows in the **Chart Data** group box to Excel.

**Print:** this selection displays the [Print Preview](#) dialog of the currently selected rows in the Chart Data group box.

**Copy Rows to Clipboard:** this selection copies the currently selected rows in the Chart Data group box to the Windows clipboard. You can paste the contents of the Windows clipboard to any Windows application.

## 6.3 Background Jobs

Click the Background Jobs () button (or select **File | Background Jobs**) to display the **Background Jobs** pop-up.



Job	Type	Start	End	Status	Next scheduled
MONTHLY	IPC Update	Apr 03, 2015 06:56 PM	Apr 03, 2015 10:02 PM		May 03, 2015 06:00 PM
	MU Clinical Quality	Apr 03, 2015 06:30 PM	Apr 03, 2015 06:30 PM		May 01, 2015 06:00 PM
	MU Performance	Apr 02, 2015 06:59 PM	Apr 02, 2015 07:05 PM		May 01, 2015 06:00 PM
NIGHTLY	Best Practice Prompts	Apr 22, 2015 06:53 PM	Apr 22, 2015 06:53 PM		Apr 23, 2015 06:00 PM
	Care Mgmt Update	Apr 22, 2015 06:54 PM	Apr 22, 2015 06:54 PM		Apr 23, 2015 06:00 PM
	CMET Data Mining	Apr 22, 2015 06:54 PM	Apr 22, 2015 07:33 PM		Apr 23, 2015 06:00 PM
	Comm Alerts	Apr 22, 2015 06:24 PM	Apr 22, 2015 06:25 PM		Apr 23, 2015 06:00 PM
	Diagnostic Tags	Apr 22, 2015 06:36 PM	Apr 22, 2015 06:36 PM		Apr 23, 2015 06:00 PM
	Flags	Apr 22, 2015 06:10 PM	Apr 22, 2015 06:24 PM		Apr 23, 2015 06:00 PM
	Natl Measures	Apr 22, 2015 06:36 PM	Apr 22, 2015 06:51 PM		Apr 23, 2015 06:00 PM
	Panel Autopopulate	Apr 22, 2015 07:33 PM	Apr 23, 2015 12:01 AM		Apr 23, 2015 06:00 PM
WEEKLY	Reminders	Apr 22, 2015 06:53 PM	Apr 22, 2015 06:53 PM		Apr 23, 2015 06:00 PM
	Best Practice Prompts	Apr 12, 2015 03:00 PM	Apr 12, 2015 06:29 PM		Apr 26, 2015 03:00 PM
	Care Mgmt Update	Apr 11, 2015 03:00 PM	Apr 12, 2015 12:14 AM		Apr 25, 2015 03:00 PM
	Diagnostic Tags	Apr 11, 2015 02:00 AM	Apr 11, 2015 05:54 AM		Apr 25, 2015 02:00 AM
	Natl Measures	Apr 11, 2015 05:54 AM	Apr 11, 2015 10:01 AM		Apr 25, 2015 02:00 AM
	Reminders	Apr 12, 2015 02:00 AM	Apr 12, 2015 01:35 PM		Apr 26, 2015 02:00 AM

Figure 6-10: Sample Background Jobs pop-up

You must dismiss the pop-up in order to use other functions in iCare.

The **File** menu has the following options:

**Page Setup:** This option allows you to set Margin, Paper, Layout characteristics (like landscape or portrait orientation), and the Printer to use.

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

**Print:** This option outputs the selected rows in the grid. The application displays the Print Preview dialog where you can view the output. Select **File | Print** (on the dialog) to output the content. The application provides a header stating Confidential Patient Information for all printed panel views.

If you do not select any rows, the application displays the warning message: You have not selected any rows to print. Do you want to proceed and print all rows in this view or cancel this print? Click **Yes** to print all the rows. Click **No** to cancel the print function.

**Close:** This option closes the Background Jobs window.

The **Edit** menu has one option: **Select All** (used to select all of the records on the pop-up window).

The **Tools** menu has options that have the same functions as those of the buttons on the right side of the toolbar.

## 6.4 Print Preview

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

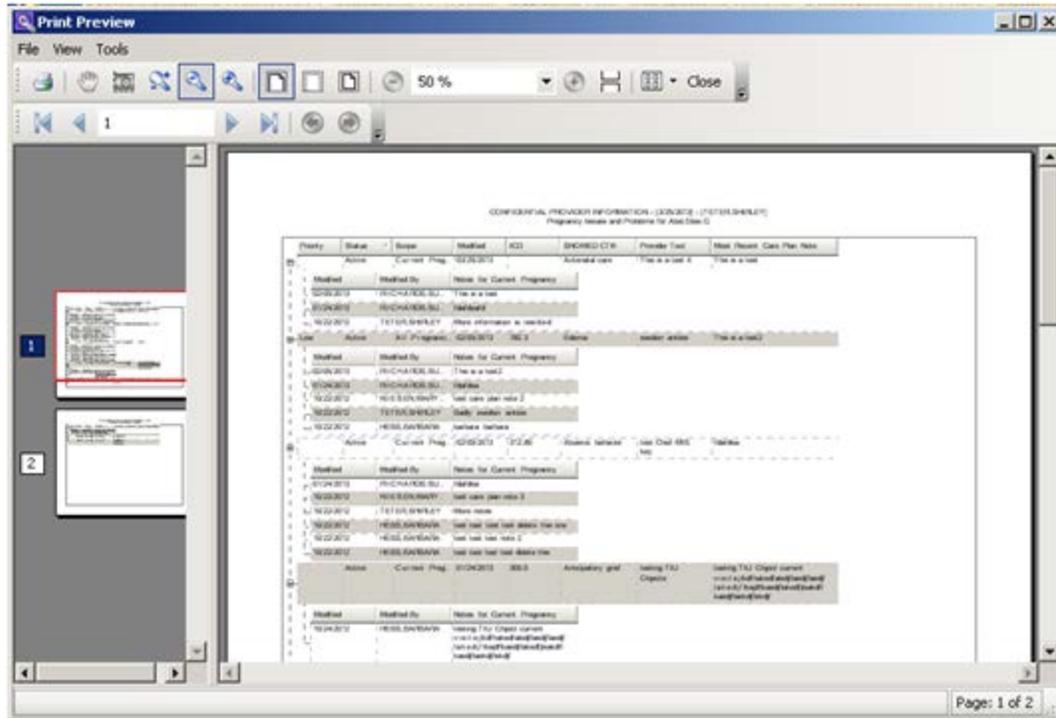


Figure 6-11: Sample Print Preview dialog

The **Print Preview** dialog 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 6-12: 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.

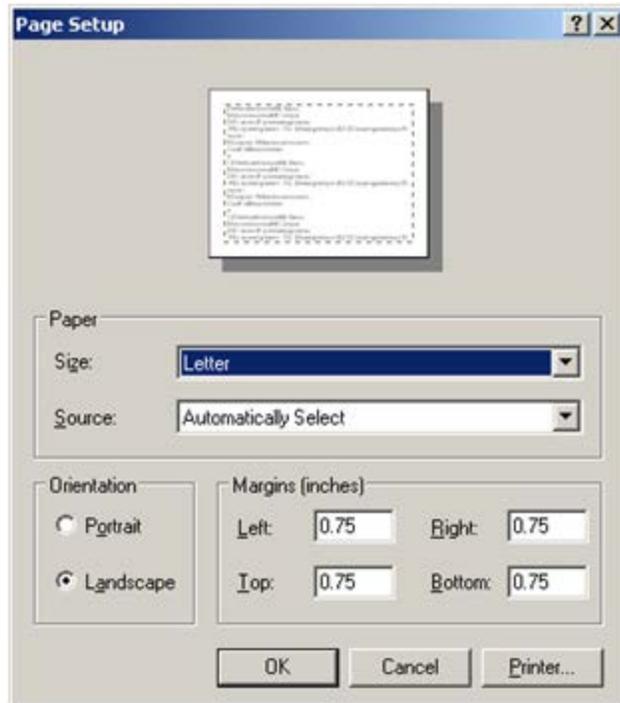


Figure 6-13: Sample Page Setup dialog

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

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

Use the **Margins** 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**.)

## 6.5 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 6-14: iCare Package Manager Functions

### 6.5.1 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**.)

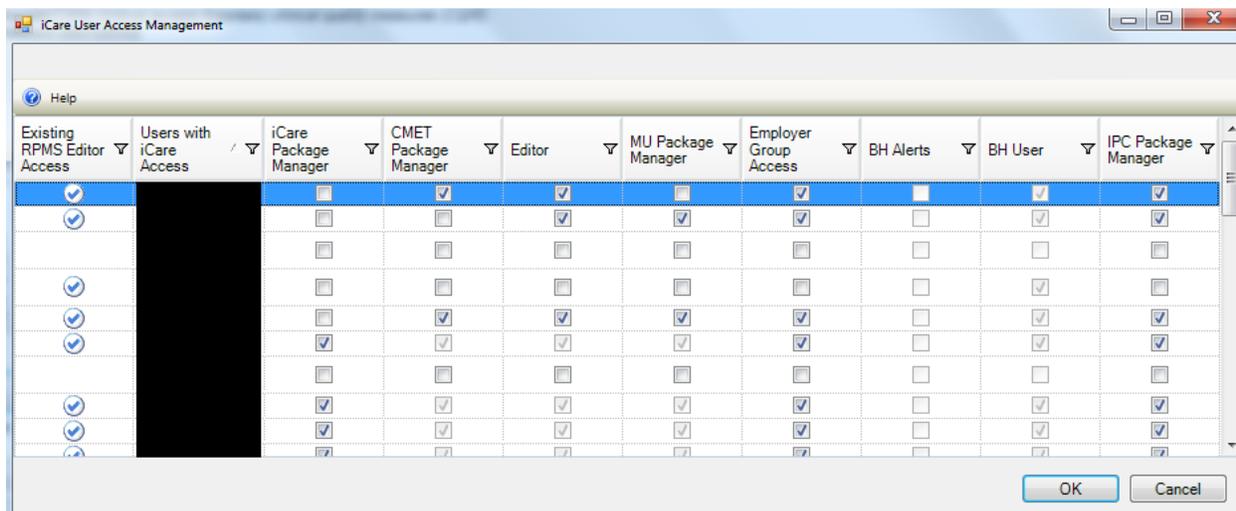


Figure 6-15: Sample iCare User Access Management dialog

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.

### 6.5.1.1 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).

### 6.5.1.2 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.

### 6.5.1.3 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.

### 6.5.1.4 iCare Package Manager

The iCare Package Manager has the ability to 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.

### 6.5.1.5 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.

### 6.5.1.6 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 functions (e.g., HMS Care Management). It also allows the person to enter Historical Data.

### 6.5.1.7 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.

### 6.5.1.8 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.

### 6.5.1.9 BH Alerts

Exclude non-BH alerts.

### 6.5.1.10 BH User

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

### 6.5.1.11 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.

## 6.5.2 Reassign Panels

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

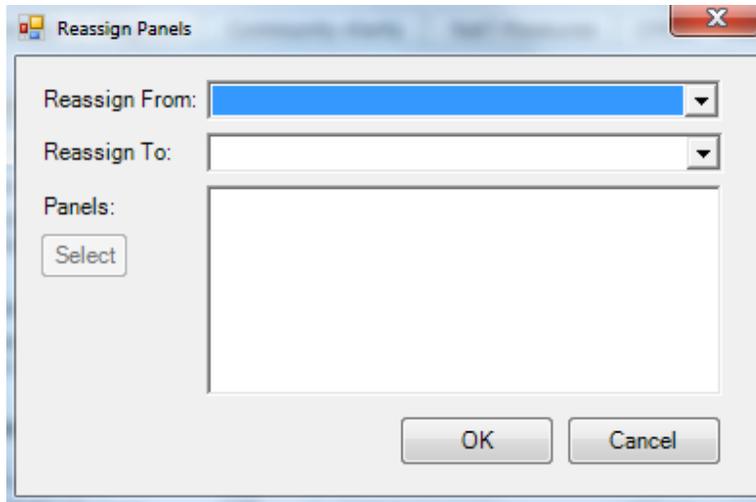


Figure 6-16: Reassign Panels Dialog

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.

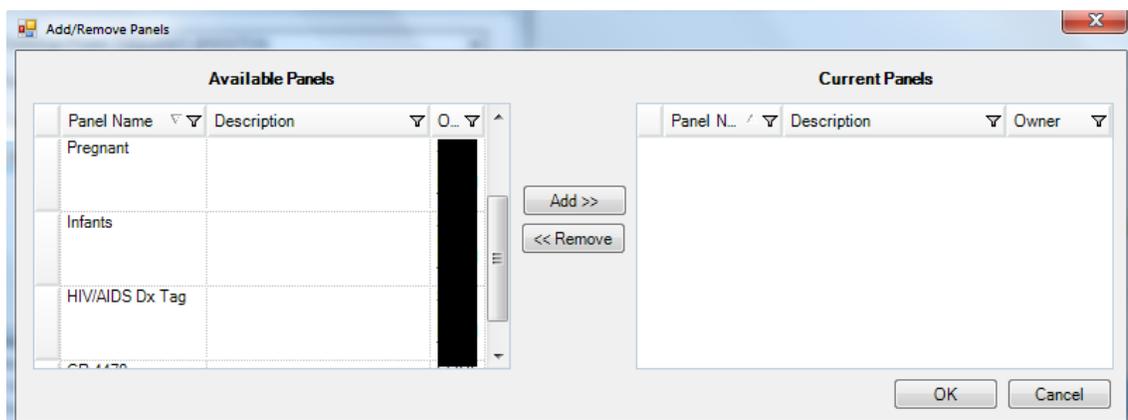


Figure 6-17: Sample Add/Remove Panels dialog

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**.)

## 6.6 Taxonomy Maintenance Functions

You access the **Taxonomy Maintenance** functions by selecting **Tools | Taxonomy Maintenance**.



Figure 6-18: Options for Taxonomy Maintenance

### 6.6.1 View Taxonomy Entries

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 selecting **Tools | Taxonomy Maintenance | View Taxonomy Entries**.

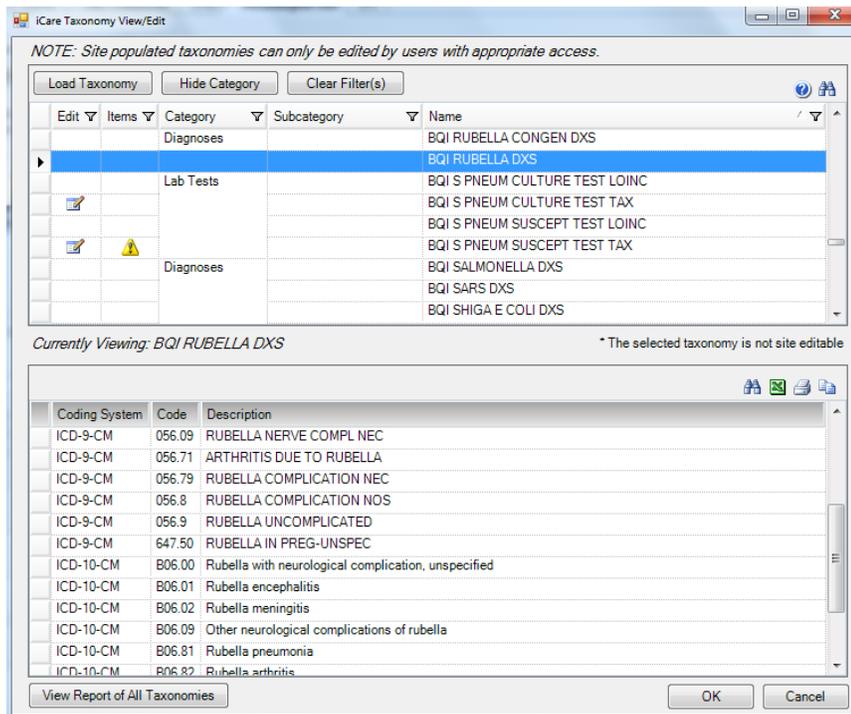


Figure 6-19: Sample iCare Taxonomy View/Edit dialog

**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 will be editable. 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.

### 6.6.1.1 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.

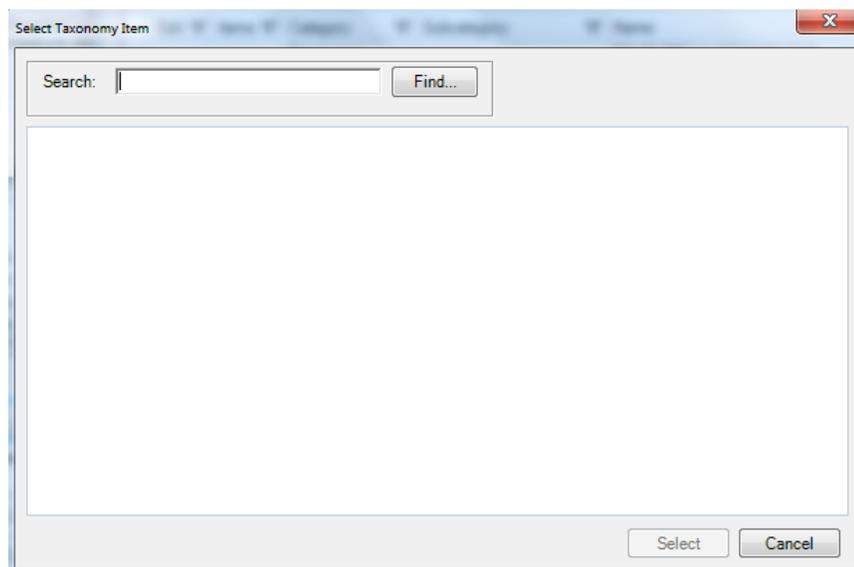


Figure 6-20: Select Taxonomy Item dialog

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, the application displays 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**).

### 6.6.1.2 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.

### 6.6.1.3 View Report of All Taxonomies Button

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

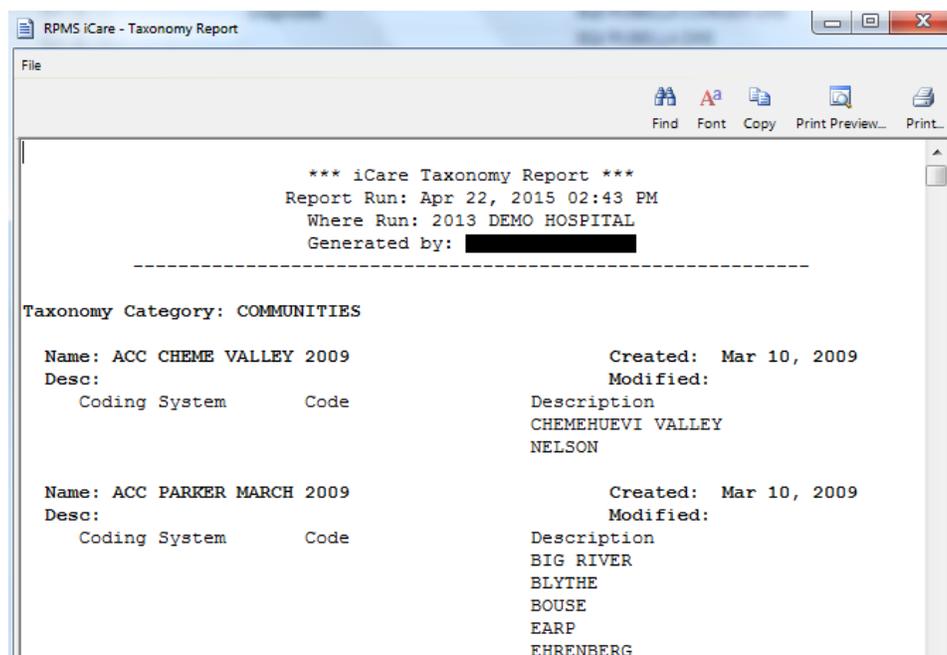


Figure 6-21: Taxonomy Report

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

Section 6.7 for more information about the File menu and buttons on the pop-up.

## 6.6.2 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 display the iCare **Taxonomy User Access Management** dialog.

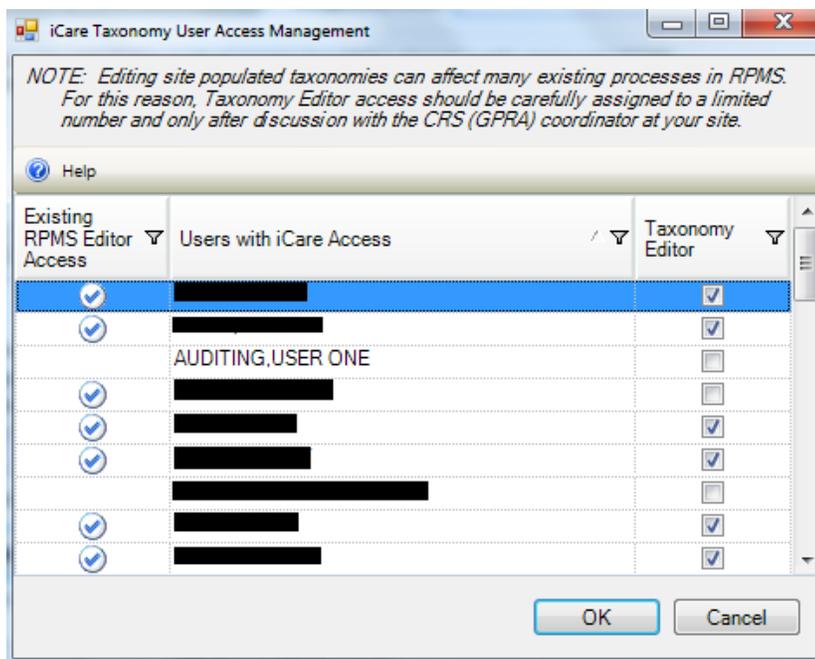


Figure 6-22: Sample iCare Taxonomy User Access Management dialog

Editing site populated taxonomies can affect many existing processes in RPMS. Be certain of your edits prior to clicking **OK**.

Taxonomy Editors can add and delete members from any Site Populated Taxonomies related to either laboratory tests or medications.

Existing RPMS Editor Access is available to any RPMS user with Manager level keys to at least one of the following case management applications: CRS (BGP), Diabetes Management (BDM), HIV Management System (BKM), and/or Women's Health (BW).

This window displays the users who have been given basic access to the iCare application by your Site (IT) Manager. You cannot give Editor or Package Manager access to iCare for users who does not have basic access. See the Site Manager to request basic iCare access for other users. This information is available when you click the **Help** menu.

The Site Manager can select or de-select the Taxonomy Editor role for a user on the list. The taxonomy editor role allows the user to view/edit the iCare taxonomies. Click **OK** to save the changes (otherwise, click **Cancel**).

## 6.7 Pop-up Functionality

You will be viewing a pop-up window in several places in iCare. 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.

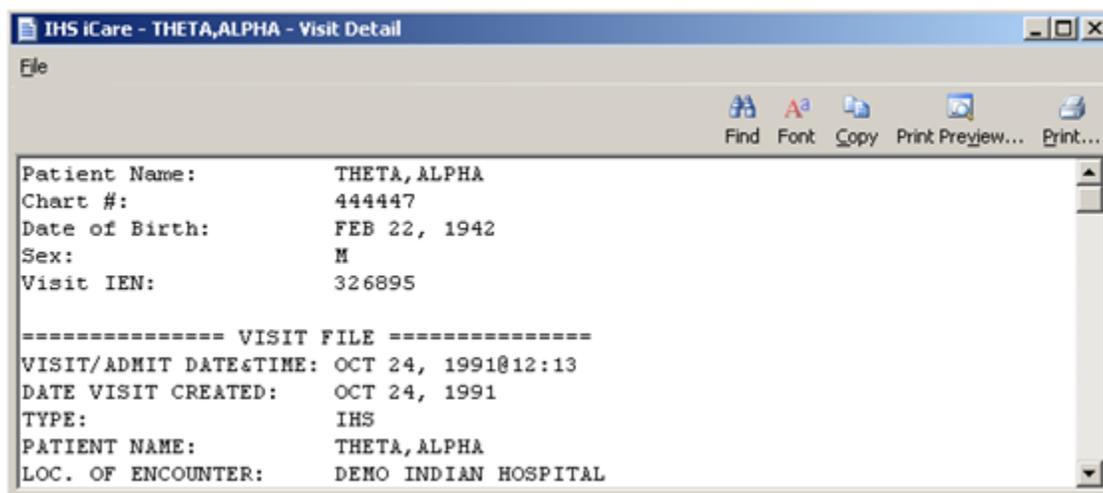


Figure 6-23: Sample Visit Detail Pop-up

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.

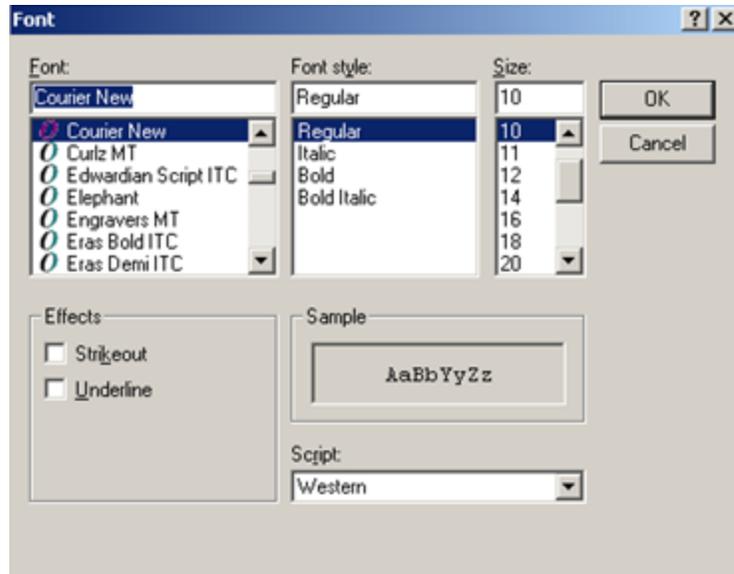


Figure 6-24: Font Dialog

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 machine. 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).

## 6.8 Change RPMS Server/Login

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

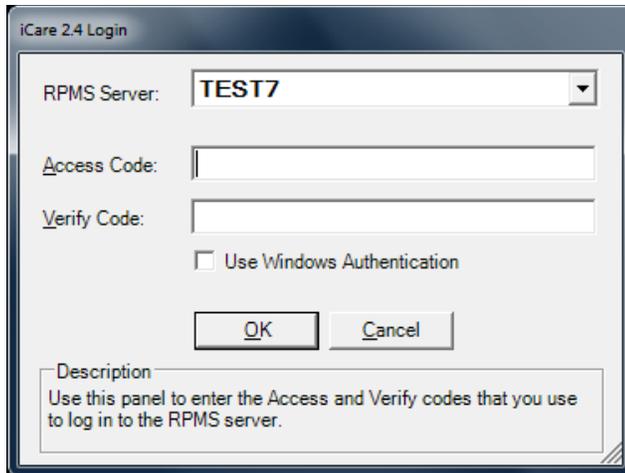


Figure 6-25: Sample iCare 2.4 Login dialog

## RPMS Server

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

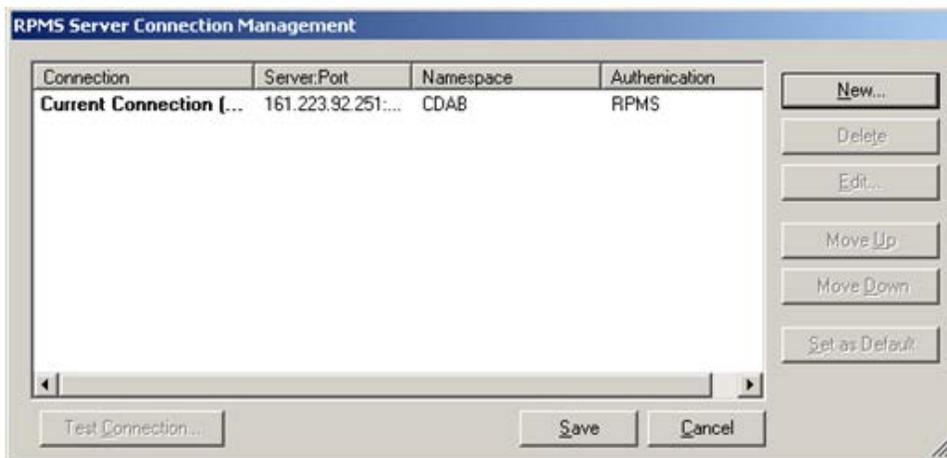


Figure 6-26: Sample RPMS Server Connection Management dialog

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 6-27: 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** and the application displays the login dialog to the application. (Otherwise, click **Cancel**.)

## 6.9 iCare Site Parameter Options

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

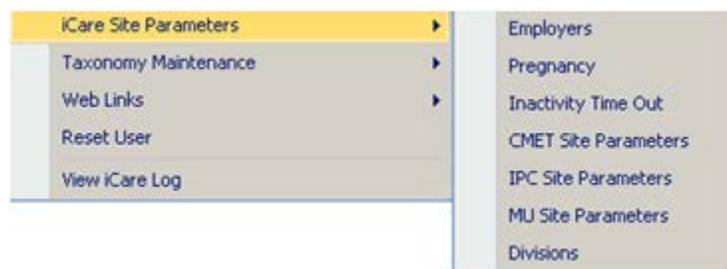


Figure 6-28: iCare Site Parameter options

### 6.9.1 Employers

Use the Employers option to determine the list of employers that should be used for employee health. This is a table of all employers in your RPMS system, many of which can have several different name spellings. Select the **Employers** option to access **iCare Site Parameters – Employers** dialog.

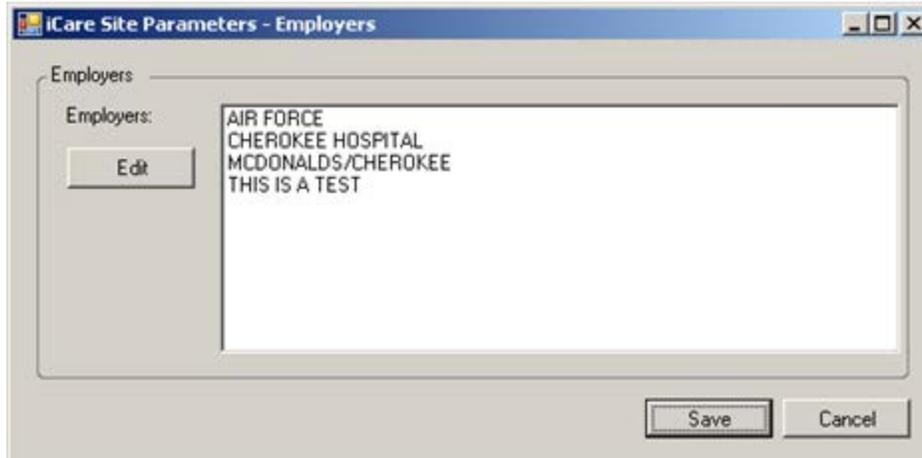


Figure 6-29: Sample iCare Site Parameters – Employers dialog

The current employers are listed in the **Employers** field.

Use the **Edit** button to edit the **Employers** field. Click **Edit** to access the **Add/Remove Employers** dialog.

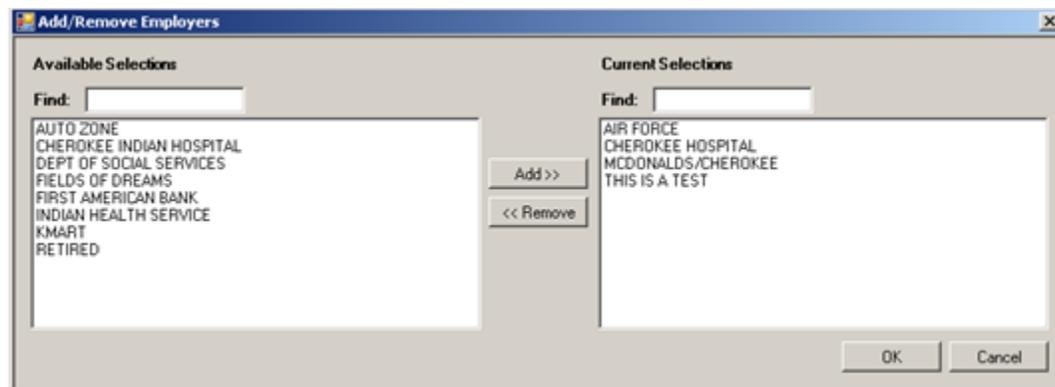


Figure 6-30: Sample Add/Remove Employers dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box populates the **Employers** field on the **iCare Site Parameters – Employers** dialog. (Otherwise, click **Cancel**.)

## 6.9.2 Pregnancy

Use the Pregnancy option to determine the definition of pregnancy by a choice of two methods for calculation. Select the **Pregnancy** option to access the **iCare Site Parameters – Pregnancy** dialog.

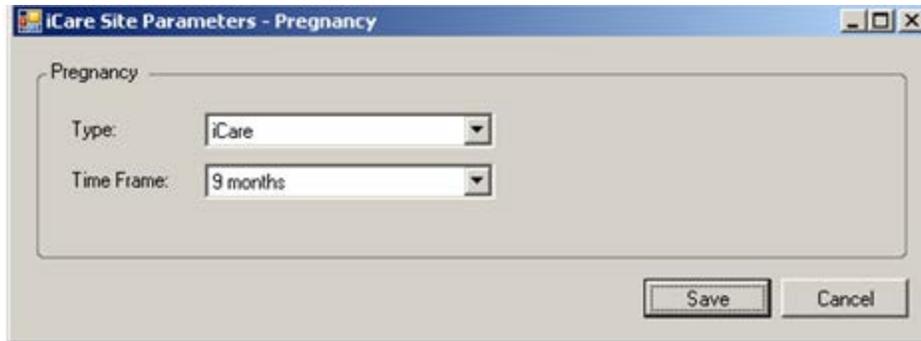


Figure 6-31: Sample iCare Site Parameters – Pregnancy dialog

### Type

The default method is based on CDC influenza disease-reporting (ILI) logic where pregnancy has to be medically indicated in the last 60 days. Select an option from the drop-down list to populate the Type field. If the “ILI” is selected, then the Time Frame field does not appear on the dialog.

### Time Frame

The second method of calculation is iCare-specific and can be set to where pregnancy has been medically indicated in the last 1-month to 9-month time period. Select an option from the drop-down list to populate the **Time Frame** field.

When the dialog is complete, click **Save** to save the pregnancy parameters. (Otherwise, click **Cancel**.)

## 6.9.3 Inactivity Time Out

iCare incorporates time out features to ensure secure usage in clinical community workstation environments. Use the Inactivity Time Out option to determine the inactivity time out, inactivity warning message time out, and application shutdown time out.

Select the **Inactivity Time Out** option to access the **iCare Site Parameters – Inactivity Time Out** dialog.



Figure 6-32: Sample iCare Site Parameters – Inactivity Time Out dialog

### **Inactivity Time Out**

Select an option from the drop-down list that determines the number of minutes before the application locks the application from further use by the current user.

### **Inactivity Warning Message Time Out**

Select an option from the drop-down list that determine the number of seconds before the Inactivity Warning Message displays.

### **Application Shutdown Time Out (in minutes)**

Select an option from the drop-down list that determines the number of minutes before the application will shutdown.

## 6.9.4 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** window.

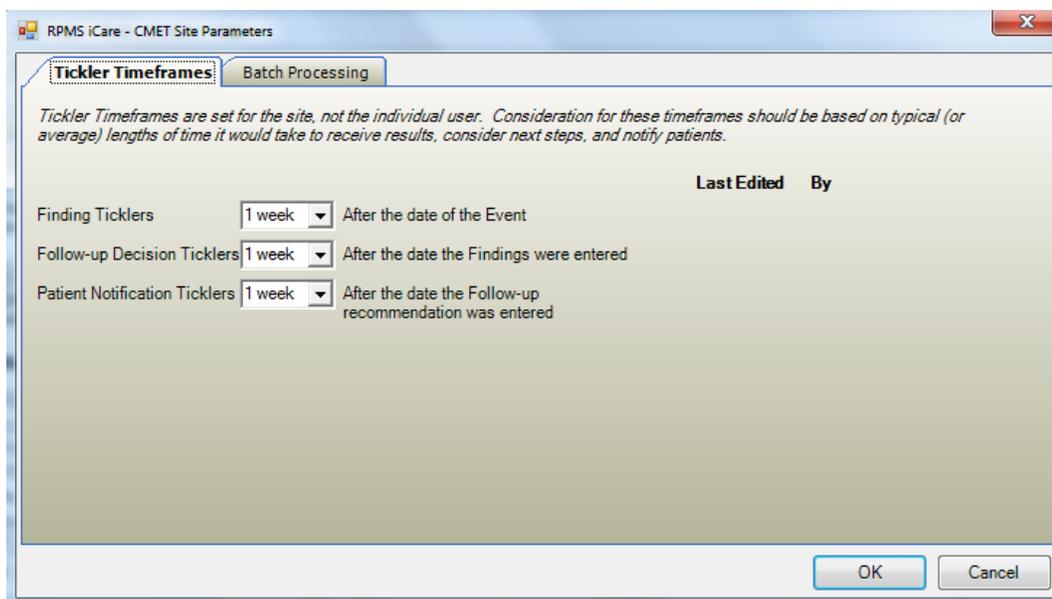


Figure 6-33: Sample RPMS iCare – CMET Site Parameters dialog

### 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**, 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 provides the user with the ability to set 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.

RPMS iCare - CMET Site Parameters

Tickler Timeframes **Batch Processing**

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

Event Name	Timeframe	Notification Type	Last Edited	By
Pap Smear	1 year	LETTER		
Mammogram Screening	2 years	LETTER	6/10/2014	

**Normal Finding for Mammogram Screening**

BI-RAD CATEGORY 1 - NEGATIVE

OK Cancel

Figure 6-34: 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**, 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**.)

## 6.9.5 IPC Site Parameters

Use the IPC Site Parameters option to determine the following IPC parameters: (1) day of month to run IPC data collection, (2) clinics where the patient receives primary care, and (3) microsystem providers.

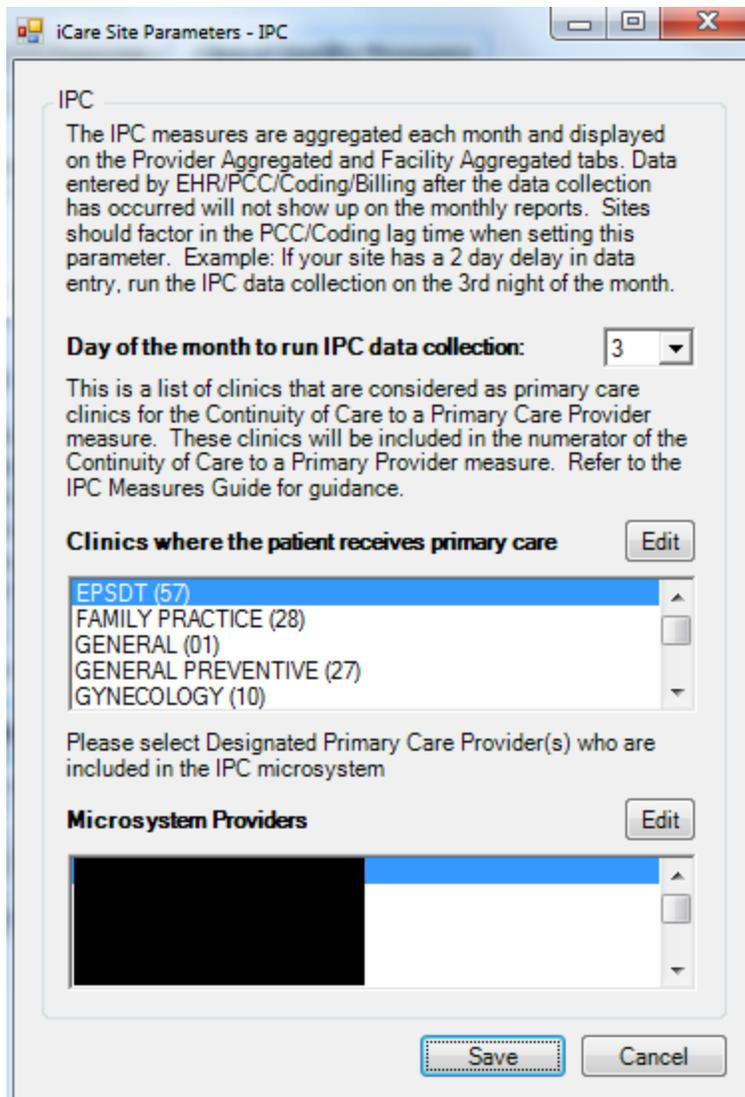


Figure 6-35: Sample iCare Site Parameters – IPC dialog

### **Day of month to run IPC data collection**

Select from the drop-down list the option that specifies the day of the month on which to run the iCare IPC data collection.

### **Clinics where the patient receives primary care**

This field determines the type of local clinics to be designated as primary care. Click **Edit** to access the **Add/Remove Visit Clinics** dialog.

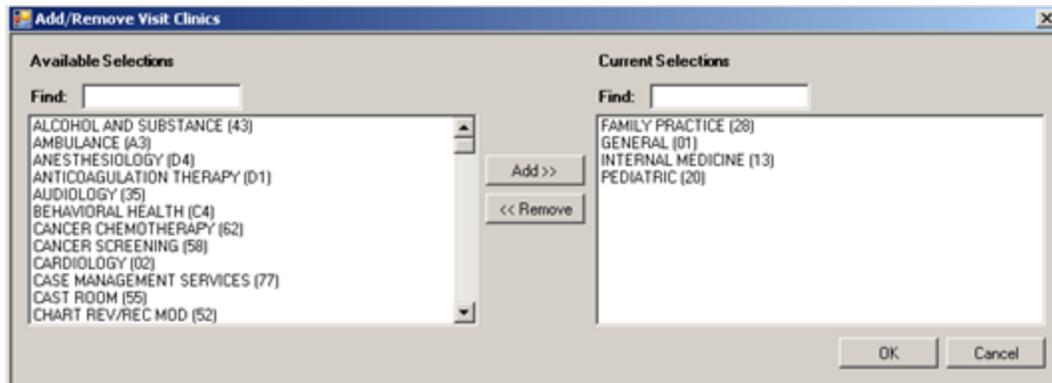


Figure 6-36: Sample Add/Remove Visit Clinics dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box populates the “Clinics where the patient receives primary care” field.

### Microsystem Providers

This field determines the names of specific providers that can be included by users in the site’s microsystem(s). Click the **Edit** button to access the **Add/Remove DPCPs** dialog.

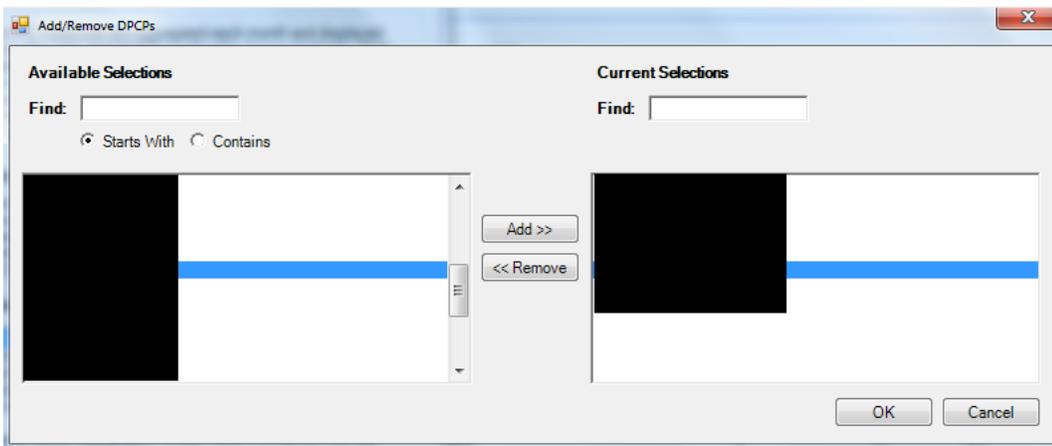


Figure 6-37: Sample Add/Remove DPCPs dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box populates the **Microsystem Providers** field. (Otherwise, click **Cancel**.)

## 6.9.6 MU Site Parameters

Use the MU Site Parameters option to determine the Meaningful Use site parameters based on the following: (1) providers based on ORES key, (2) performance, and (3) clinical quality. Select the MU Site Parameters option to access the Meaningful Use Site Parameters dialog.

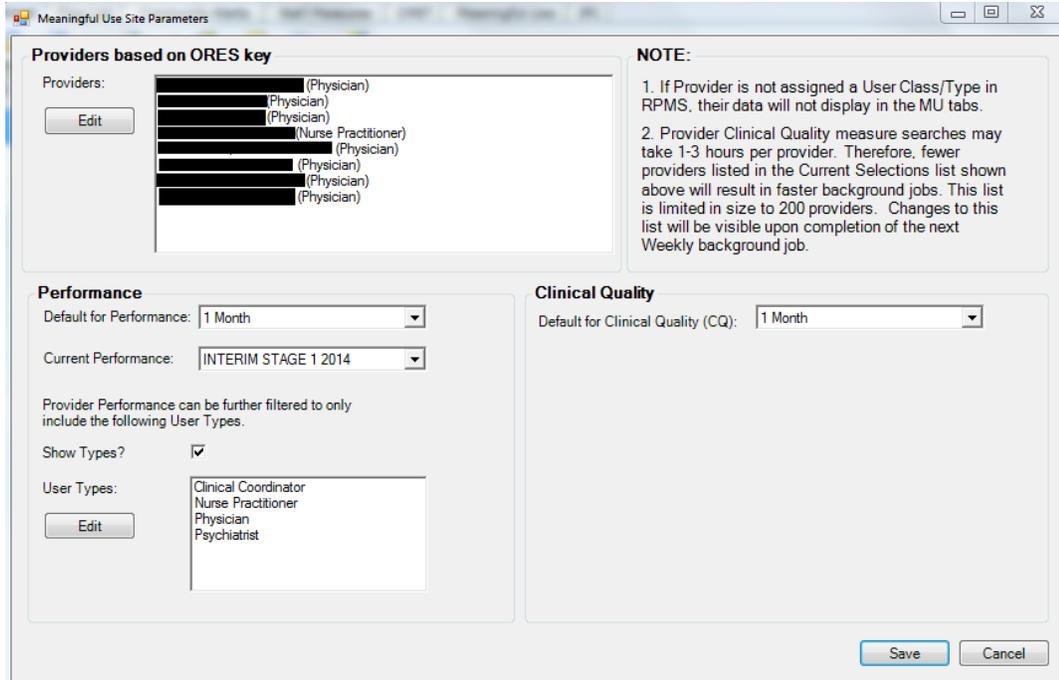


Figure 6-38: Sample Meaningful User Site Parameters dialog

When the **Meaningful User Site Parameters** dialog is complete, click **Save** to save the MU site parameters. (Otherwise, click **Cancel**.)

### Providers based on ORES key

The **Providers** field contains the list of Providers that is listed on the **Providers Performance** tab (of MU). Click **Edit** to access the **Add/Remove Meaningful Use Providers** dialog.

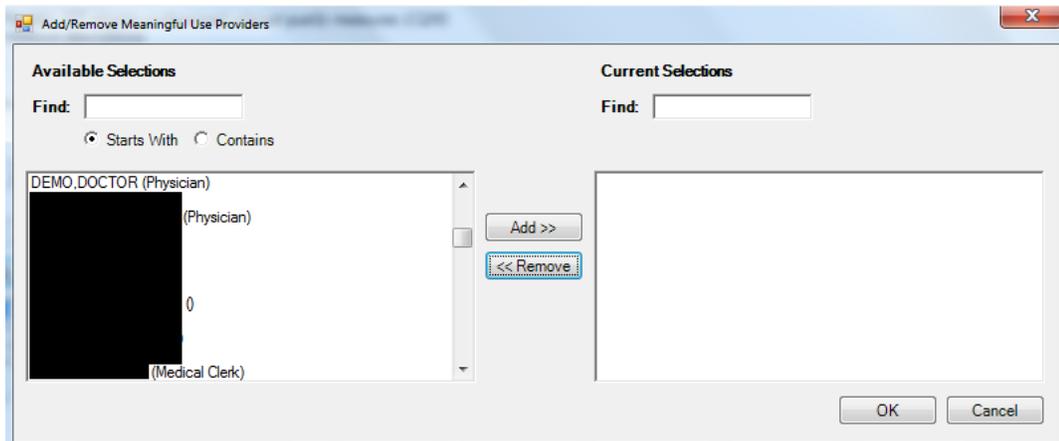


Figure 6-39: Sample Add/Remove Meaningful Use Providers dialog

When the **Add/Remove** dialog is complete, click **OK** and the names in the **Current Selections** group box populate the **Providers** field for the “Providers Based on ORES key” group box. (Otherwise, click **Cancel**.)

## Performance group box

Use the **Performance** group box to set the default timeframes for displaying MU performance and CQI measures data.

### Default for Performance

Select an option from the drop-down list to determine the default timeframe.

### Current Performance

Select an option from the drop-down list the determines the current performance stage.

### Show Types?

Select this check box to display the “Type” column on the Providers Detail tab of the MU window.

### User Types

This field contains the user classes for the performance measures. Click **Edit** to access the **Add/Remove User Classes** dialog.

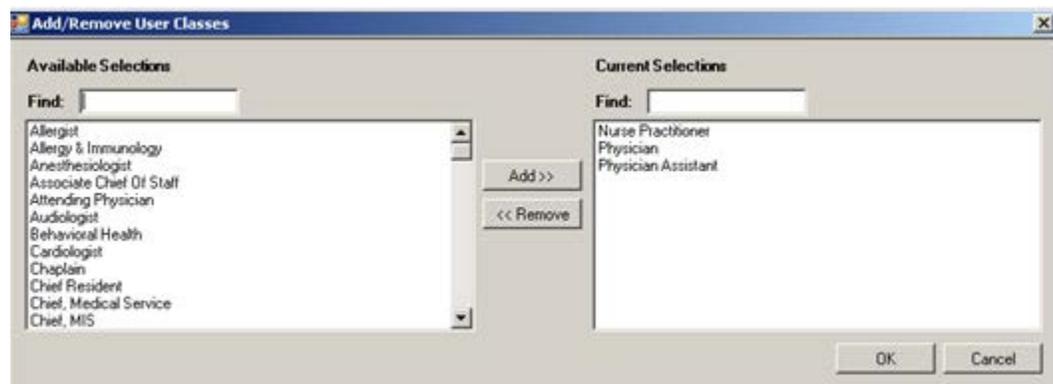


Figure 6-40: Sample Add/Remove User Classes dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box will populate the **User Types** field in the **Performance** group box. (Otherwise, click **Cancel**.)

## Clinical Quality

Select an option from the drop-down list that determine the default clinical quality time for the Clinical Quality measure searches.

### 6.9.7 Divisions

Use the Divisions option to determine the divisions for your site. Select the **Divisions** option to access the **iCare Site Parameters – Divisions** dialog.

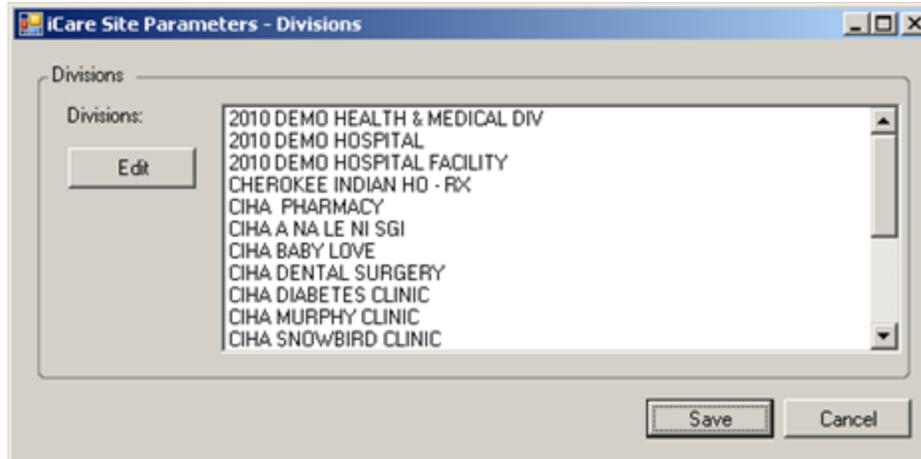


Figure 6-41: Sample iCare Site Parameters – Divisions dialog

The listed divisions are those used by your site. Click **Edit** to access the **Add/Remove Divisions** dialog.

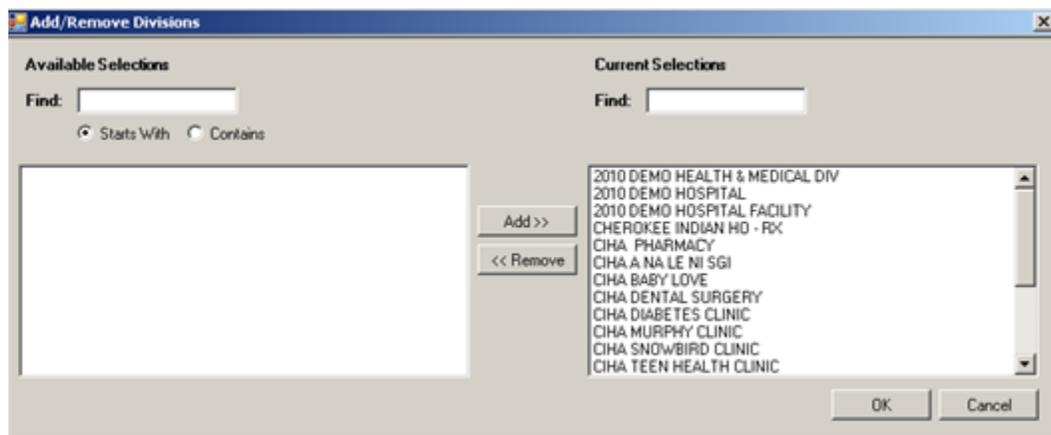


Figure 6-42: Sample Add/Remove Divisions dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box will populate the **Divisions** field on the **iCare Site Parameters – Divisions** dialog. (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.

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

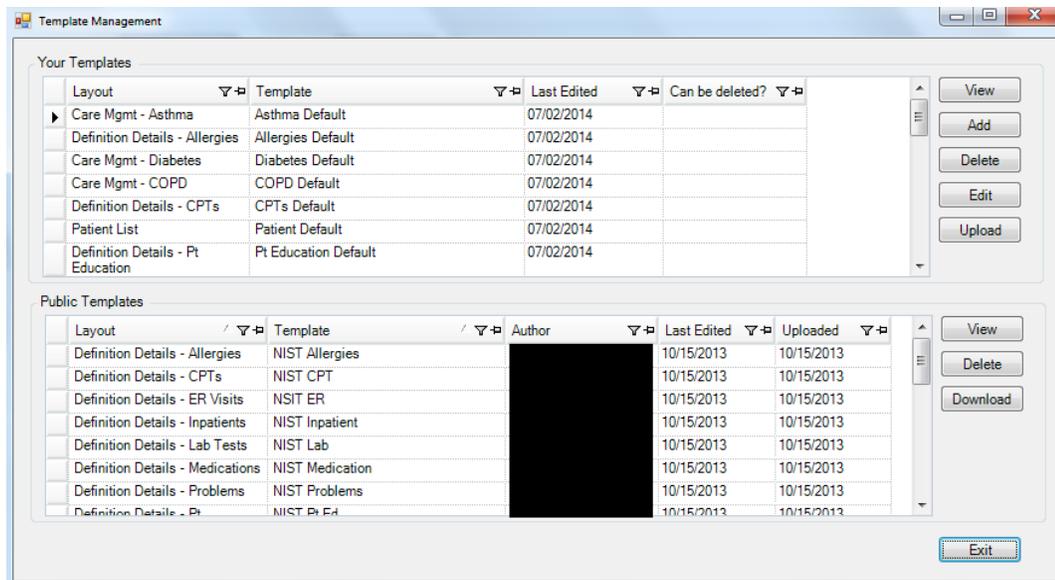


Figure 6-43: Sample Template Management dialog

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 display 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 6.10.6 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.

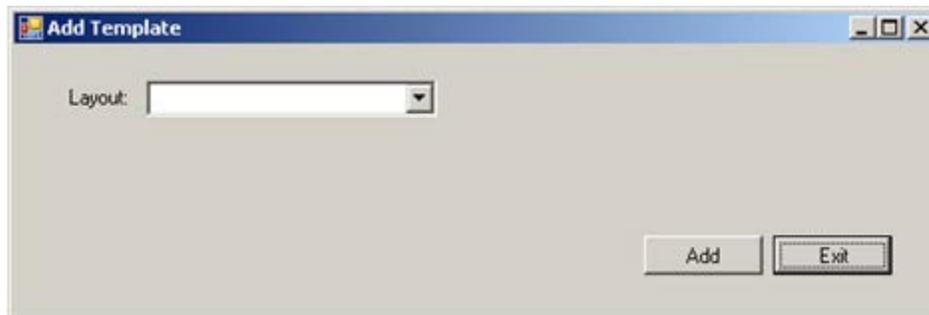


Figure 6-44: Add Template dialog

**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.

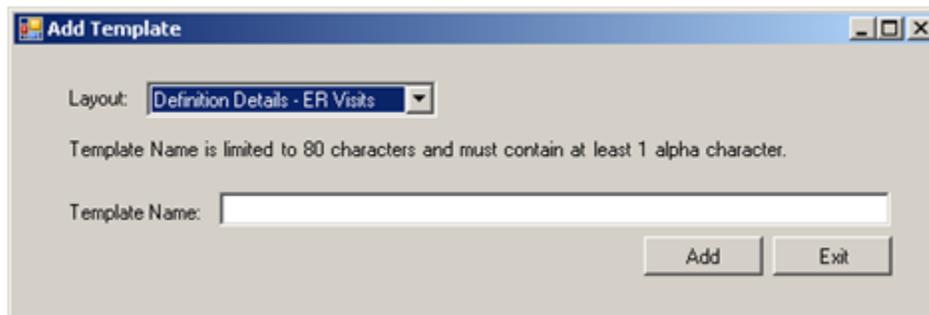


Figure 6-45: Add Template dialog with added field

**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**.)

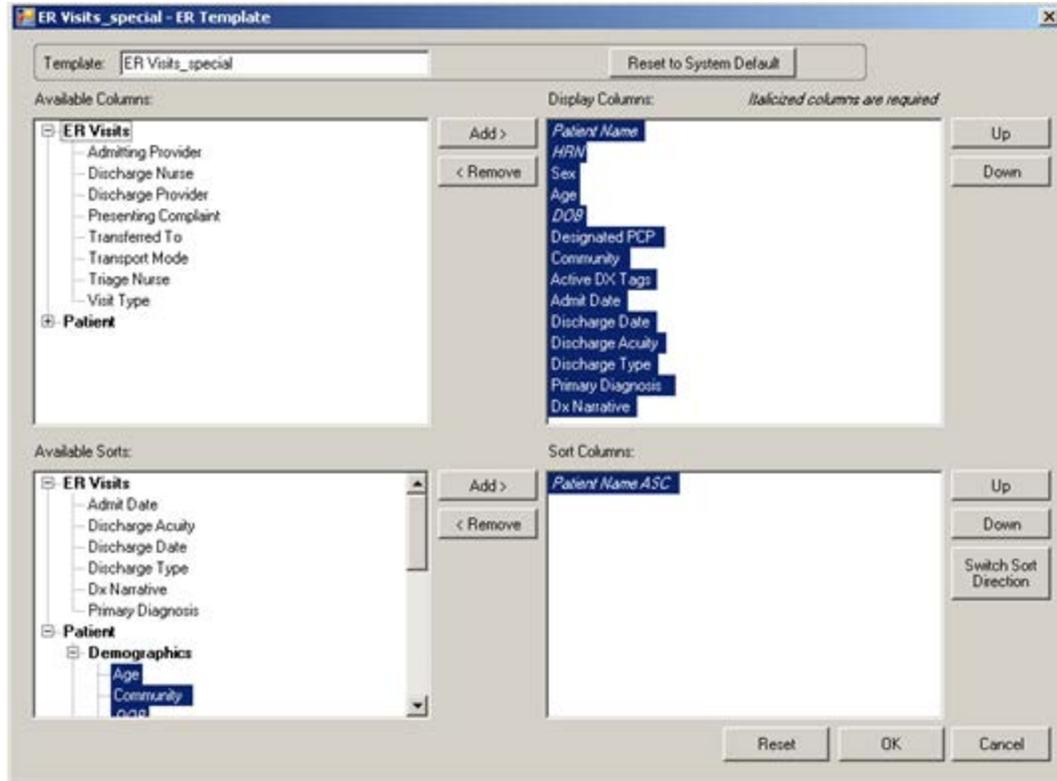


Figure 6-46: Sample template for new template created

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

If you changed several things 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.

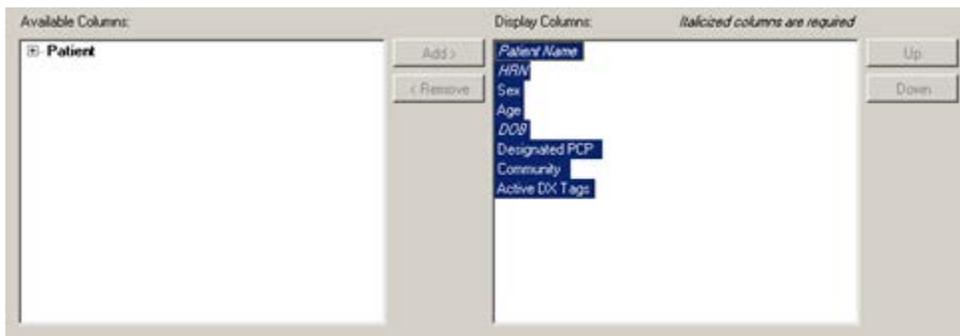


Figure 6-47: Sample Display and Available columns

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 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 alpha-numeric order.

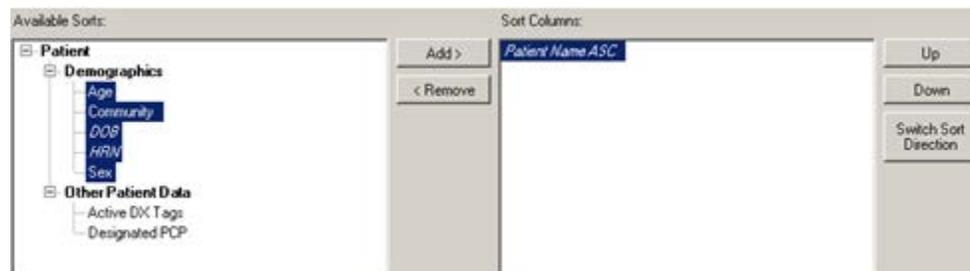


Figure 6-48: Sample Available Sorts and Sort Columns area

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.

## Panel List

The list of patient panels owned by the user.

## 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.

Within RPMS, the term “provider” has different specific meanings. See definitions for Designated Primary Care Provider (DPCP); Primary Provider; Visit Providers.

## 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

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
GUI	Graphical User Interface
HHS	Health and Human Services
IHS	Indian Health Service
OIT	Office of Information Technology
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](mailto:support@ihs.gov)