RESOURCE AND PATIENT MANAGEMENT SYSTEM

Patient Information Management System (PIMS)

Addendum to User Manual

Version 5.3 Patch 1010
October 2009

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

The requirements and functionality outlined in the SRS Patient Information Management System Version 5.3 Patch 1010 includes corrections to bugs found both before and after release of PIMS v5.3 Patch 1009 and approved enhancements.
SECURITY

This patch uses the same security keys as described in the Patient Information Management System User Manual v5.3.
# Table of Contents

## 1.0 Introduction

1.1 Summary of Changes ...............................................................1

## 2.0 Scheduling

2.1 No Shows ..................................................................................2
2.2 Clinic Setup ............................................................................2
2.2.1 Clinic Set Up Removed Fields .............................................3
2.3 Inactivate Wait List ...................................................................3
2.4 Routing Slip Format .................................................................4

## 3.0 Admission/Discharge/Transfer (ADT)

3.1 UB04 - UB92 ...........................................................................6
3.2 Extended Bed Control (EBC) Service Transfer .......................6
3.3 I Visits .....................................................................................6
3.4 Deleting Discharge Date ............................................................8

## 4.0 Sensitive Patient Tracking (SPT)

4.1 Purge Access logs .................................................................9

## 5.0 Report Changes

5.1 PIMS Reports ..........................................................................11
5.1.1 Frequent no-shows ...............................................................11
5.1.2 List Appointments Made by Clinic (LAM) ............................12
5.1.3 Address Insurance Update (AIU)........................................14
5.1.4 Default Division .................................................................15
5.1.5 Clinic Profiles for ALL Clinics ............................................15
5.1.6 Health Summary Reports ..................................................16
5.1.7 Date/Time on A SHEET .....................................................17
5.2 ADT Reports ..........................................................................19
5.2.1 Form Feeds ........................................................................19
5.3 SPT Reports ............................................................................19
5.3.1 Sort by User’s Service ........................................................19

## 6.0 Contact Information .................................................................23
1.0 Introduction

Please review these changes, and add a copy of them to any printed documents that you site may be using for PIMS v5.3. These changes will be integrated into future versions of the software and user manuals and will no longer be considered an addendum at the time of the next release. This addendum contains those patch changes that are relevant to the user. To see a list of all changes, please refer to the patch notes for each of the respective patches.

1.1 Summary of Changes

Patch 1010 provides corrections and enhancements to v5.3 of the Patient Information Management System. It is inclusive of modifications implemented by previous patches and contains the following functional and report changes:

In the PIMS Scheduling application, No-Show date is displayed per patient, check out date and time is included in the PCC Visit File, and waiting lists can be inactivated. In Clinic Setup the Principal Clinic and Clinic Name can no longer be the same. A logic check is done in regards to the site parameter values of ROUTING SLIP FORMAT and PRINT EXTRA RS FOR CHART.

In the PIMS ADT application, Admission Type and Source field labels have been changed from UB92 to UB-04.

The Frequent No-Show Report can now be sorted by patient and clinic code. A new report LAM, lists the number of appointments made and who made those appointments. Additional data appears on the AIU Form which includes Number in Household, Household Income and Parent Employers. More printing features have been included to output profiles for all clinics, different health summaries and print date and time on the A SHEET. Extra form feeds should no long occur.
2.0 Scheduling

2.1 No Shows

a. SCH > AM > Patient Name or Chart Number > MA > CLINIC

When making an appointment, if the patient has had a previous No-Show you will be asked if you would like to display No-Show information for that patient.

Enter Y (YES) or N (NO) at the prompt “DISPLAY NO SHOWS?” the default is NO.

Figure 2-1: This information will only print if the patient has been a previous NO SHOW for an appointment.

2.2 Clinic Setup

Principal Name and Clinic Name

When setting up a clinic set up an error message will be displayed when trying to enter the same name in Clinic Name and Principal Name.
SCH > SCS > SET > ClinicName >

Figure 2-2: Page 1 of 4 – Clinic Set Up

2.2.1 Clinic Set Up Removed Fields

Two fields were removed from the Clinic Setup Screen (4 of 4). They were TRIAGE CLINIC AND PYXIX LOCATION. These fields were not deleted from the database and their values can still be accessed via FileMan.

2.3 Inactivate Wait List

SCH > SCS > IWL

At the prompt enter the name of a clinic or enter “??” for a list of available. Select the clinic you When the field INACTIVE is set to YES the Waiting List will not be accessible, when the field INACTIVE is set to NO the Waiting List will be accessible.
2.4 Routing Slip Format

\[ SCH > SCS > ACM > ESP > \]

When ROUTING SLIP FORMAT is set to Duplicate PRINT EXTRA ROUTING SLIP FOR CHART must be set to NO. When ROUTING SLIP FORMAT is set to Short or Long, PRINT EXTRA ROUTING SLIP FOR CHART can be set to YES or NO.
Figure 2-5: Example of Error Routing Slip Format cannot equal to Duplicate, while Print extra routing slip is Yes
3.0 Admission/Discharge/Transfer (ADT)

3.1 UB04 - UB92

ADMISSION TYPE-UB92 has been changed to ADMISSION TYPE-UB-04.
ADMISSION SOURCE-UB92 has been changed to ADMISSION SOURCE-UB-04.
This update does not affect the list of choices or previously entered data.

ADT > PatientName > Select Admission Date@Time

3.2 Extended Bed Control (EBC) Service Transfer

ADT>BC>PCH and ADT>BC>TTX

Extended Bed Control will allow editing past service or provider transfers for all admissions in the Provider Change (PCH) and the Treating Specialty Transfer (TTX) menus.

3.3 I Visits

Enter I Visits in ADT > IC > CODE. Access the incomplete chart by entering the patient name associated with the chart. To ADD/MODIFY PCC Data enter 2 at the prompt.
Figure 3-1: Select option 5

Figure 3-2: Enter Add at the prompt and hit enter. Enter the IMMUNIZATION name and LOT. Hit enter to return back to the patient record.
3.4 Deleting Discharge Date

If a patient has been discharged in the database and is still in the hospital, the date of discharge will need to be deleted. When the date of discharge is deleted the Incomplete Chart Record (V HOSPITAL ENTRY) will also be deleted. When the actual discharge date is entered the Incomplete Chart Record will be available.

If a DAY SURGERY needs to be deleted, the DAY SURGERY VISIT will also be deleted.
4.0 Sensitive Patient Tracking (SPT)

4.1 Purge Access logs

The application will allow users to purge access logs of non-sensitive records. The users will be prompted for a begin date and end date.

SPT > PPAT > Y > Begin Date > End Date

Listed below is an example of this functionality:

*****************************************
*        INDIAN HEALTH SERVICE          *
*   SENSITIVE PATIENT TRACKING MODULE   *
*             VERSION 5.3              *
*****************************************

NOT-A-REAL FACILITY

DUA    Display User Access to Patient Record
EAR    Enter/Edit Access Restrictions
EPL    Enter/Edit Patient Security Level
LSP    List Sensitive Patients
PAU    Display All Patients Accessed by a User
PLOG   Purge Record of User Access from Security Log
PPAT   Purge Non-sensitive Patients from Security Log
UAR    User Access Report
USP    Update Security Parameters
XSO    Sensitive Patient Tutorial

Select Sensitive Patient Tracking Option: PPAT  Purge Non-sensitive Patients from Security Log

Use this option to purge patients from the DG SECURITY LOG file if the patient’s security level is non-sensitive.

Are you sure you want to purge all non-sensitive patients? No// Y  (Yes)
Begin Date: 0101  (JAN 01, 2009)
End Date: T  (AUG 18, 2009)

Do you want to print patients as they are purged? No// Y  (Yes)

DEVICE: HOME// <ENTER> VIRTUAL Right Margin: 80// <ENTER>

Purge Non-sensitive Patients from Security Log started AUG 18, 2009@14:30.
...HADGAS, GLADYS M (100282)
...LAA, DARLENE R (102209)
...LAA, DEONAKA LEE (103152)
...MONNALL, DELPHINE V (106459)
...LAA, BETTE A (111092)

Purge completed AUG 18, 2009@14:30. Number of records purged: 5
Press ENTER to continue: <ENTER>
5.0 Report Changes

5.1 PIMS Reports

5.1.1 Frequent no-shows

The Frequent No-Show Report was not providing the sort by Patient and by Clinic code. It has now been corrected.

SCH > SCR > NSR > 2 > DIVISION(S) > CLINIC(S) > DATE RANGE > Number of No-Shows that defines FREQUENT > CATEGORY > Include OTHER INFO?

The category types include: F (facility), P (principal clinic), C (clinic), N (patient), O (clinic code).

Figure 5-1: Example of a Frequent No-Show Report by category of Patient Name.
5.1.2 List Appointments Made by Clinic (LAM)

A new report has been added to the PIMS Scheduling application. The report provides a Listing of Appointments Made by Users during a Date Range or a Listing of the Number of Appointments Made by a User by clinic during date range.

SCH > SCS > LAM > Report Type > DIVISION(S) > CLINIC(S) > DATE RANGE

The report types include: 1 (List Appointments), 2 (List Users with Counts).
Figure 5-3: Example of an Appts Made By Users Report (Report Type=1).

Figure 5-4: Example of a Number of Appts Made By Users Report (Report Type=2).
5.1.3 Address Insurance Update (AIU)

5.1.3.1 Number in Household and income

The AIU Form that can be accessed through the PIMS Scheduling application has been updated. The AIU form that is printed and provided to patients now includes Number in Household and Household Income information.

SCH > SCR > AIU > PatientName

Figure 5-6: Example: First page of the Address/Insurance Update form.

5.1.3.2 Parent Employment Information

The AIU Form that can be accessed through the PIMS Scheduling application has been updated. The AIU form that is printed and provided to patients now includes Parent Employment information.

SCH > SCR > AIU > PatientName
5.1.4 Default Division

The division name displayed for the user signed in is the default name in the DIVISION field in Scheduling.

When accessing reports, the DIVISION will default to the site the user is signed in under.

5.1.5 Clinic Profiles for ALL Clinics

Under the Supervisor Menu in Scheduling, one has the ability to print a Clinic profile of a particular clinic. A user can now print multiple clinics or all clinics.
5.1.6 Health Summary Reports

5.1.6.1 Extra Form Feeds
Extra form feeds have been removed when printing health summary and routing slips.

SCH > SCR > HSC > Date > Division(s) > Clinic(s) > By Patient Name > Yes > Health Summary Type > Device

5.1.6.2 Printing a different Health Summary
Users have the option to choose different health summaries when running the Health Summaries by clinic report.

SCH > SCR > HSC > Date > Division(s) > Clinic (s) > Sort > Health Summary Type
Select Reports Menu (Scheduling) Option: HSC  Health Summaries by Clinic
Print Health Summaries for Which Date:  T-1  (JUL 28, 2009)
Select division: WHITE EARTH HEALTH CENTER//  <ENTER>
Select another division: SELLS HOSP
Select another division: <ENTER>
Select clinic: ALL//  <ENTER>

Select one of the following:

C    BY CLINIC NAME
P    BY PRINCIPAL CLINIC
T    BY TERMINAL DIGIT
N    BY PATIENT NAME

HEALTH SUMMARIES SORT ORDER: P// <ENTER> BY PRINCIPAL CLINIC
Do you want to also print other forms? YES// NO
Select Health Summary: ??

Choose from:
ADULT REGULAR
AUDIOLOGY
BEHAVIORAL HEALTH
CHR
DENTAL
DIABETES STANDARD
DMS DIABETES LAB REPORT
DMS DIABETIC FLOWSHEET
DMS LAB REPORT
IMMUNIZATION
PATIENT MERGE (COMPLETE)
PEDIATRIC
PRENATAL
PROBLEM LIST
SAMPLE
VPR LABS
VPR MINI
VPR REMINDERS
VPR VISITS

Select Health Summary:

5.1.7 Date/Time on A SHEET

The A SHEET is a report that is accessible through the PIMS ADT application. The Print Date and Time now appears on the A SHEET when it is printed or reprinted.

There are multiple ways to print an A SHEET, following are three examples:

a. ADT > IC > CODE > Select patient > Select a visit > 6
b. ADT > IC > ICF > 4
c. ADT > RM > AFM > 4
The Print Date Time field is under Item 52 on the A Sheet, bottom line at left.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-73-44</td>
<td>Soc Sec No</td>
</tr>
<tr>
<td>INDIAN/ALAS</td>
<td>Classif.</td>
</tr>
<tr>
<td>61</td>
<td>Facility Code</td>
</tr>
<tr>
<td>08/09/1947</td>
<td>Birthdate</td>
</tr>
<tr>
<td>F</td>
<td>Sex</td>
</tr>
<tr>
<td>AKU504</td>
<td>Admit Srvc &amp; Code</td>
</tr>
<tr>
<td>FP 17</td>
<td>Admit Date</td>
</tr>
<tr>
<td>SOUTH</td>
<td>Community Code</td>
</tr>
<tr>
<td>HENRY,JOANN</td>
<td>Admtg Provider</td>
</tr>
<tr>
<td>JOLYN,UDELL J.</td>
<td>Person to Notify</td>
</tr>
<tr>
<td>MOTHER</td>
<td>Relationship</td>
</tr>
<tr>
<td>CHEST PAIN</td>
<td>Admitting Diagnosis</td>
</tr>
<tr>
<td>27 POA</td>
<td>ICD9</td>
</tr>
<tr>
<td>28 Established DX</td>
<td>30 DX</td>
</tr>
<tr>
<td>31 Op &amp; Selec Procedures</td>
<td>32 Infect Date</td>
</tr>
<tr>
<td>33</td>
<td>Discharge Type</td>
</tr>
<tr>
<td>35 Facility Transferred To</td>
<td>39 # Consults</td>
</tr>
<tr>
<td>42&amp;43 E-Codes &amp; Place of Occurrence</td>
<td>47 Underlying Cause of Death &amp; Code</td>
</tr>
<tr>
<td>50 Attending Physician</td>
<td>Date</td>
</tr>
<tr>
<td>HENRY,JOANN</td>
<td>50a Phys. Code</td>
</tr>
<tr>
<td>51</td>
<td>Date &amp; Time Printed</td>
</tr>
</tbody>
</table>

Select Incomplete Chart Menu Option: ICF Incomplete Chart Forms
Choose Form To Print: (1-5): 4 (Final A Sheet/Bill Prep Worksheet)
Select Patient: JOLYN, MEREDITH E  F 08-09-1947 XXX-XX-6403 WE 107344
Select Report to Print: 2/ 1 (A Sheet Only)
Print How Many Copies: (1-10): 1/ <ENTER>
DEVICE: HOME// <ENTER> VIRTUAL
5.2 ADT Reports

5.2.1 Form Feeds

Extra form feeds have been removed from the print function for ADT reports.

Note: that if you try to print a Health Summary from the menu option HSR, if your Clinic parameter has been set to NO then your printer will print a blank sheet as it opens the printer device before it can determine the parameters that have been set.

5.3 SPT Reports

5.3.1 Sort by User’s Service

There is a new report that provides a listing of users’ SERVICE entry.

The user will need to be entered first using EAR before that user will display when running the User Access Reports (UAR). You will be unable to select yourself.

Select ADT Menu Option: SPT  Sensitive Patient Tracking

***********************************************************************
*          INDIAN HEALTH SERVICE          *
*     SENSITIVE PATIENT TRACKING MODULE    *
*        VERSION 5.3                       *
***********************************************************************

NOT-A-REAL FACILITY

DUA    Display User Access to Patient Record
EAR    Enter/Edit Access Restrictions
EPL    Enter/Edit Patient Security Level
LSP    List Sensitive Patients
PAU    Display All Patients Accessed by a User
PLOG   Purge Record of User Access from Security Log
PPAT   Purge Non-sensitive Patients from Security Log
UAR    User Access Report
USP    Update Security Parameters
XSO    Sensitive Patient Tutorial

Select Sensitive Patient Tracking Option: EAR  Enter/Edit Access Restrictions

Use this option to restrict a user from accessing specific patient records. Restrictions can be lifted, either for a specific period of time or permanently. This option is to be used when a patient requests that particular staff or providers are not to view his/her record at all.
User's Access Restrictions  Sep 29, 2009 08:05:27  Page: 1 of 1
User: CRESPIN-RICHARDS,KIM
Last Signed on MAY 22, 2009@14:54:33

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Chart #</th>
<th>Restriction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO RESTRICTED RECORDS FOUND</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Enter ?? for more actions
1 Add Restricted Record  3 Lift Restriction
2 View Restricted Record  4 Resume Restriction
Select Action: Quit//  1 Add Restricted Record

Select RESTRICTED RECORD PATIENT NAME: LAA,BETTE

User's Access Restrictions  Sep 29, 2009 08:05:51  Page: 1 of 1
User: CRESPIN-RICHARDS,KIM
Last Signed on MAY 22, 2009@14:54:33

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Chart #</th>
<th>Restriction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 LAA,BETTE A</td>
<td>111092</td>
<td>RESTRICTED ACCESS</td>
</tr>
</tbody>
</table>

Enter ?? for more actions
1 Add Restricted Record  3 Lift Restriction
2 View Restricted Record  4 Resume Restriction
Select Action: Quit//  QUIT

Select USER: HENRY ??
Answer with NEW PERSON NAME, or INITIAL, or SSN, or VERIFY CODE, or NICK NAME, or SERVICE/SECTION, or DEA#, or VA#, or CODE, or IHS LOCAL CODE, or IHS ADC INDEX, or ALIAS, or NPI
Do you want the entire NEW PERSON List? N (No)

Select an active user. Cannot select yourself.
Select USER: <ENTER>

DUA Display User Access to Patient Record
EAR Enter/Edit Access Restrictions
EPL Enter/Edit Patient Security Level
LSP    List Sensitive Patients  
PAU    Display All Patients Accessed by a User  
PLOG  Purge Record of User Access from Security Log  
PPAT  Purge Non-sensitive Patients from Security Log  
UAR   User Access Report  
USP   Update Security Parameters  
XSO   Sensitive Patient Tutorial  

Select Sensitive Patient Tracking Option: UAR User Access Report  

Select one of the following:  
M    MAIL CODE  
S    SERVICE SECTION  

Sort By : M// MAIL CODE  
DEVICE: HOME// <ENTER> VIRTUAL Right Margin: 80// <ENTER>  

Sensitive Patient Tracking - Users Access by MAIL CODE Date: Sep 29, 2009  

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Mail Code</th>
<th>Service/Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRESPI-RICHARDS, KIM</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>REBIEJO, WANDA</td>
<td>N/A</td>
<td>BUSINESS OFFICE</td>
</tr>
<tr>
<td>VIGIL-GOMEZ, THELMA</td>
<td>N/A</td>
<td>BUSINESS OFFICE</td>
</tr>
<tr>
<td>WILLIAMS, MARK</td>
<td>N/A</td>
<td>MENTAL HEALTH</td>
</tr>
</tbody>
</table>

DUA   Display User Access to Patient Record  
EAR   Enter/Edit Access Restrictions  
EPL   Enter/Edit Patient Security Level  
LSP   List Sensitive Patients  
PAU   Display All Patients Accessed by a User  
PLOG  Purge Record of User Access from Security Log  
PPAT  Purge Non-sensitive Patients from Security Log  
UAR   User Access Report  
USP   Update Security Parameters  
XSO   Sensitive Patient Tutorial  

Select Sensitive Patient Tracking Option: UAR User Access Report  

Select one of the following:  
M    MAIL CODE  
S    SERVICE SECTION  

Sort By : M// SERVICE SECTION  
Service/Section: BUSINESS OFFICE BUS  
DEVICE: HOME// <ENTER> VIRTUAL Right Margin: 80// <ENTER>  

Sensitive Patient Tracking - Users Access by SERVICE SECTION Date: Sep 29, 2009  

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Service Section</th>
<th>Mail Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>REBIEJO, WANDA</td>
<td>BUSINESS OFFICE</td>
<td>N/A</td>
</tr>
<tr>
<td>VIGIL-GOMEZ, THELMA</td>
<td>BUSINESS OFFICE</td>
<td>N/A</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>DUA</td>
<td>Display User Access to Patient Record</td>
<td></td>
</tr>
<tr>
<td>EAR</td>
<td>Enter/Edit Access Restrictions</td>
<td></td>
</tr>
<tr>
<td>EPL</td>
<td>Enter/Edit Patient Security Level</td>
<td></td>
</tr>
<tr>
<td>LSP</td>
<td>List Sensitive Patients</td>
<td></td>
</tr>
<tr>
<td>PAU</td>
<td>Display All Patients Accessed by a User</td>
<td></td>
</tr>
<tr>
<td>FLOG</td>
<td>Purge Record of User Access from Security Log</td>
<td></td>
</tr>
<tr>
<td>PPAT</td>
<td>Purge Non-sensitive Patients from Security Log</td>
<td></td>
</tr>
<tr>
<td>UAR</td>
<td>User Access Report</td>
<td></td>
</tr>
<tr>
<td>USP</td>
<td>Update Security Parameters</td>
<td></td>
</tr>
<tr>
<td>XSO</td>
<td>Sensitive Patient Tutorial</td>
<td></td>
</tr>
</tbody>
</table>

Select Sensitive Patient Tracking Option:  <ENTER>
6.0 Contact Information

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

Phone: (505) 248-4371 or (888) 830-7280 (toll free)
Fax: (505) 248-4363
Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm
Email: support@ihs.gov