Patient Information Management System

(PIMS)

Addendum to User Manual

Version 5.3 Patch 1013
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Office of Information Technology (OIT)
Division of Information Resource Management
Albuquerque, New Mexico
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Preface

The requirements and functionality outlined in the SRS Patient Information Management System Version 5.3 Patch 1013 includes corrections to bugs found after release of PIMS v5.3 Patch 1012 and approved enhancements.

Security

This patch uses the same security keys as described in the Patient Information Management System User Manual version 5.3.
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 1013 provides corrections and enhancements to version 5.3 of the Patient Information Management System.

Modifications

- New Advanced Access Report
- New site parameter for changing the routing slip default
- Add other phone to appointment list
- Modified Month-at-a-Glance to display alphabetically
- Add Day Surgery as a Treating Specialty
- Modify Census reports to reflect Day Surgery
- Field created to capture reason for deleting an admission, add to BDG Deleted Admits bulletin
- Modify workload report to mask SSN and add HRN
- Fix wait list so recall dates sort properly
- Add Wait List as a letter type
- Add option to print letters from Wait List
2.0 Scheduling (SCH)

2.1 Appointment List

SCH > AL

The patient cell phone number (Other Phone) has been added to print on the appointment list. This phone number can be populated in Patient Registration.

You will be prompted to “Include Patient’s Phone #?” the user can enter Y (Yes) or N (No).

Use this option to print a list of scheduled appointments for one of more clinics for a specific date. You can ask for all clinics or by principal clinic. Optional items to include are walk-ins, who made the appointment, patient’s phone number, work phone, current community, and primary care provider assignments.

Select division: CIHA HOSPITAL// 7247
Select another division:
Select clinic: ALL//
For Date: TODAY// (Jul 11, 2011)
For Date:
Include Walk-Ins? YEs//
Include Who Made Appt? NO//
Include Patient’s Phone #? NO//YES
Include Primary Care Information? NO//
Include Current Community? NO//
Include Chart Requests? NO//

Select one of the following:
B  BROWSE ON SCREEN
P  PRINT ON PAPER

Figure 2-1: Selecting an appointment list

<table>
<thead>
<tr>
<th>Appointments for GENERAL clinic on Jul 11, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 PM (15Mins) (Outpatient)</td>
</tr>
<tr>
<td>GOURD, FRED MILLER #167199 1/6/1946 (65Y) (MCR)</td>
</tr>
<tr>
<td>Home Phone: 555-555-5783 Work Phone: Other Phone: 555-555-5711</td>
</tr>
</tbody>
</table>

Enter?? For more actions
Selection Action: Quit//

Figure 2-2: Appointment List Display
2.2 Month-At-A-Glance Display

SCH>MD

The Month-at-a-glance display has been modified to display clinics in an alphabetical order when choosing to display the first available appointment under a principal clinic. The clinic will only display if they have available appointments for the dates selected.

To display availability follow these steps:
1. Select principle clinic which has multiple clinics linked to it.
2. At the next prompt select ‘Display first available for clinics under this grouping’
3. Enter earliest possible appointment date.
4. Enter latest possible appointment date.

Select CLINIC: General
This is a Principal Clinic!
1 Display availability of just this clinic
2 Display first available for clinics under this grouping
Select 1 or 2: (1-2): 2//^  

Select CLINIC: BLUE
1 BLUE FP PRINCIPLE
2 BLUE SAME DAY PRINCIPLE
3 BLUE SPECIALTY PRINCIPLE
CHOOSE 1-3: 1 BLUE FP PRINCIPLE  

This is a Principle Clinic!
1 Display availability of just this clinic
2 Display first available for clinics under this grouping
Select 1 or 2: (1-2): 2//  

Enter EARLIEST POSSIBLE APPT DATE: TODAY// (Jul 15, 2011)
Enter LATEST POSSIBLE APPT DATE: T+15// (Jul 30, 2011)

Figure 2-3: Selecting a principal clinic to display month-at-a-glance

<table>
<thead>
<tr>
<th>Time</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nurse- BLUE/GEN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul 15, 2011 FR 15</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 18, 2011 MO 18</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 19, 2011 TU 19</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 20, 2011 WE 20</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 21, 2011 TH 21</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 22, 2011 FR 22</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 25, 2011 MO 25</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Jul 26, 2011 TU 26</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
2.3 Waiting List

2.3.1 Waiting List Display

SCH>WL

Changes have been made to the waiting list to display the patients in chronological order with the current year displaying first. The dates will also display in order by calendar month. This is when the user selects to display the list by recall date.

2.3.2 Printing Recall Letters

A new option has been added to allow the user to print recall letters for the patients on the wait list. The recall letters can be added or edited in the Supervisor Menu Enter/Edit Letter under (W) Wait List.

The printed letter will include the recall date and the name of the wait list clinic/ward.
Figure 2-6: Printing Recall Letters
3.0 Admission/Discharge/Transfer (ADT)

3.1 Treating Specialty

ADT>SM>SYS>SAF

This setup option presents all official IHS inpatient services and their IHS code in alphabetical order. The display also includes abbreviations, hospital service, and whether or not this treating specialty is set up as an active admitting service at your facility. Only those set up correctly may be chosen when admitting a patient.

Day Surgery has now been added as a treating specialty in ADT. This option will need to be set up properly in the Setup ADT Files. The census reports have also been modified to include Day Surgery.

The Day Surgery treating specialty should only be used when the patient is located in the inpatient area. An exception to this would be if the facility set up a separate ward for all ambulatory care surgical services. This would allow the facility to use ADT for both the inpatient (xxx) and (xx) the outpatient delivery areas. The provider can select the service of “DS” and then select either an inpatient ward or the new ward. The advantage is that the provider only has to remember one way to admit patients; further, delayed orders can be used on Day Surgery patients as well.

<table>
<thead>
<tr>
<th>NAME: DAY SURGERY</th>
<th>IHS CODE: 23</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABBREVIATION: DS</td>
<td></td>
</tr>
<tr>
<td>SPECIALTY: GENERAL SURGERY</td>
<td></td>
</tr>
<tr>
<td>HOSPITAL SERVICE: AMBULATORY CARE</td>
<td></td>
</tr>
<tr>
<td>ADMITTING SERVICE? YES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Active?</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN 1, 2011</td>
<td>YES</td>
</tr>
</tbody>
</table>

Exit  Save  Refresh
Enter a command or '^^' followed by a caption to jump to a specific field

Figure 3-1: Setup ADT File

3.2 Extended Bed Control (EBC)

ADT>BC>EBC

A new field has been added which requires the user to enter a reason that an admission is being deleted.
Once the admission is deleted, all recipients who receive the BDG Deleted Admits bulletin through mailman will all see this same reason on their notification.

```
CHOOSE FROM:
1 - Admit Patient
2 - Transfer Patient
3 - Discharge Patient
Select Option: 1 ADMIT PATIENT
ADMISSION DATE: Jun 20, 2011@11:27:36//@

Are you sure you want to delete this movement? No// Y (Yes)
Select one of the following:
A  Admit Error
P  Patient Refused
L  Left Without Being Seen
O  Other
Delete Reason:  Patient Refused

Updating automated team lists...completed.
Updating appointment status...completed.
...Inpatient Medication check...
...discontinuing Inpatient Medications order...done...
```

Figure 3-2: Deleting an Admission
4.0 Sensitive Patient Tracking (SPT)

4.1 Display User Access

SPT>DUA

This option will display who accessed a particular patient record over a given date range. You can view just one user's access or that of all users who accessed the record. The report descriptions have been modified to increase the number of characters visible in this field to show more information about the user access. (Please remember we are not able to adjust the descriptions to be more explicit those would have to come from the EHR package. We can only increase the field size so that you can see and print more of the description.)

This report will only print if Sensitive Patient Tracking is turned on and there are patients marked as “Sensitive”. The Option/Protocol column on the report should give you a description as to what the user accessed. Only holders of the DG Security Officer key can access this report.

<table>
<thead>
<tr>
<th>USER</th>
<th>DATE ACCESSED</th>
<th>OPTION/PROTOCOL USED</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRONSON, GINNY</td>
<td>JUN 07, 2011@15:57</td>
<td>Appointment Management</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>AUG 04, 2011@10:12</td>
<td>Extended Bed Control</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>JUL 11, 2011@13:40</td>
<td>EDIT a patient’s file</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>JUL 11, 2011@13:39</td>
<td>Make Appointment</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>JUN 06, 2011@14:19</td>
<td>Extended Bed Control</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>May 25, 2011@14:31:10</td>
<td>Extended Bed Control</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>May 25, 2011@14:31</td>
<td>Extended Bed Control</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>May 25, 2011@14:28</td>
<td>Admit a Patient</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>May 19, 2011@16:16</td>
<td>Admit a Patient</td>
</tr>
<tr>
<td>SMITH, CHERYL</td>
<td>May 19, 2011@14:49</td>
<td>View Admission History</td>
</tr>
</tbody>
</table>

Enter ?? for more actions
Select Action: Quit//

Figure 4-1: Display User Access Report
5.0 Report Changes

5.1 PIMS Reports

5.1.1 Advanced Access Report

The Advanced Access Report can be utilized to assess the internal and external demand for appointments. The report may be evaluated on a daily basis to adjust the providers’ schedules so that patients have better access to health care.

SCH > SCR > WSR > 8

Select one of the following:
- C Clinic
- P Principal Clinic
- V Provider
- T Team

Subtotal Report by: Clinic
Select division: CIHA HOSPITAL// 7247
Select another division:
Would you like a preexisting Clinic Taxonomy?? NO/
Select clinic: ALL//ANTICOAGULATION
Select another clinic:
Would you like to save this clinic list as a Taxonomy?? NO/
Select First date to Search: 06012011 (JUN 01, 2011)
Select Last Date to Search: T (AUG 04, 2011)

Select one of the following
- I Include ALL Patients
- E Exclude DEMO Patients
- O Include ONLY DEMO Patient

Demo Patient Inclusion/Exclusion: E//Include ALL Patients

Figure 5-1: Example of how to generate Advanced Access Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Category</th>
<th>External Appt</th>
<th>Demand WI</th>
<th>Internal FU</th>
<th>Unmet WL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 07, 2011</td>
<td>ANTICOAGULATION</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>External Demand Subtotal</td>
<td>4</td>
<td>FU Subtotal</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun 09, 2011</td>
<td>ANTICOAGULATION</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>External Demand Subtotal</td>
<td>0</td>
<td>FU Subtotal</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug 04, 2011</td>
<td>ANTICOAGULATION</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>External Demand Subtotal</td>
<td>2</td>
<td>FU Subtotal</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5.1.2 Routing Slips

A new option has been added to allow the user to select “All Routing Slips” when printing the routing slips.

SCH > SCS > RS

Routing Slips FOR WHICH DIVISION: CIHA HOSPITAL//
DO YOU WANT ROUTING SHEET FOR A SINGLE PATIENT? No// (No)

Select one of the following:

A  All Routing Slips
O  Only Add-Ons

Select ALL Routing Slips (A) or Only Add-ons (O): ALL Routing SlipsLL

ROUTING SHEETS
Select one of the following:

1  TERMINAL DIGIT
2  CLINIC NAME
3  PRINCIPLE CLINIC
4  PATIENT NAME

Choose Sort Order: 2 CLINIC NAME
PRINT ROUTING SLIPS FOR WHAT DATE: 08042011 (AUG 04, 2011)
Select Clinic: ALL//ANTICOAGULATION
Select another clinic:
Would you like to save this clinic list as a Taxonomy?? NO// NO

DEVICE PRTEGI//

Figure 5-3: Example on printing "All-Routing-Slips"

5.1.3 Workload/Statistical Report

The clinic workload report has been modified to display the last four digits of the Social Security Number (SSN) dependent on whether the user has the SSN key. The Health Record Number has also been added to the report.

SCH > SCR > WSR > 5

Select division: CIHA HOSPITAL// 7247
Select another division:

***** Date Range Selection****
Beginning DATE: 07012011 (JUL 01, 2011)
5.1.4 Print Letter Tracking by Patient

A new option has been added to allow users to track the number of letters that have been printed for individual patients. The report will print the name of the letter printed, the last date a letter was printed, and the number of times each letter was printed for that patient. The site has the option to turn on/off this option in the Scheduling Parameters.

To turn on/off the letter tracking option:

SCH>SCS>ACM>ESP
TRACK LETTER PRINTING: YES

Choose from:
0     NO
1     YES

SCH>SCR>LETT

LETT  Print Letter Tracking By Patient
RCL Restricted Clinic List by Division

Select Report Menu (Scheduling) Option: LETT Print Letter Tracking By Patient
Select Patient:  DMEO, BOBBIE

F **SENSITIVE** CI 176224

***WARNING***
***RESTRICTEDRECORD***

DEVICE: HOME// VT Right Margin: 80//

Patient Letter Tracking for: DEMO, BOBBIE Date Printed: 311080

<table>
<thead>
<tr>
<th>Letter</th>
<th>Last Date Printed</th>
<th>Number of Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPD Pre-Appt (Blue)</td>
<td>JUL 01, 2011</td>
<td>2</td>
</tr>
<tr>
<td>GENERAL WAIT LIST</td>
<td>JUL 15, 2011</td>
<td>12</td>
</tr>
</tbody>
</table>

Figure 5-6: Example: Letter Tracking by Patient

5.2 ADT Reports

5.2.1 ADT Statistical Reports

An option has been added to allow the user to select day surgery patients only when generating the Inpatient Statistics by Ward and Inpatient Statistics by Service Reports.

ADT > RM > ASR
Use this option to review ADT census and other statistics by ward or by service. Each report gives you a different view of the ADT activity at your facility.

1 Average Daily Patient Load (ADPL)
2 Inpatient Statistics by Ward
3 Inpatient Statistics by Service
4 On-line Help (Report Descriptions)

Choose report from List: (1-4): 2
Select Beginning Date: 01012011 (JAN 01, 2011)
Select Ending Date: T (Aug 08, 2011)
Include INACTIVE WARDS? NO//

Select one of the following:
1 Inpatients Only
2 Observation Patients Only
3 Day Surgery Patients Only
4 ALL
Select Patient Type: ALL// 3 Day Surgery Patients Only
DEVICE: HOME//

Figure 5-7: Example of how to generate the Inpatient Statistics by Ward Report
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](http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm)

**Email:** support@ihs.gov