



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

Addendum to User Manual Meaningful Use (MU) User Manual

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Preface

The purpose of this manual is to provide the needed information to use the latest enhancements to the iCare (BQI) population management application that supports the IHS Meaningful Use (MU) initiative.

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

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

- iCare – IHS OIT
Available at <http://www.ihs.gov/cio/ca/icare/>
- iCare Population Management GUI, User Manual Version 2.2 (July 2011).
Available at http://www.ihs.gov/PPMS/PackageDocs/bqi/bqi_022u.pdf
- HHS WebEx recorded training sessions (search for iCare). Available at http://www.ihs.gov/cio/ca/icare/index.cfm?module=dsp_icare_cmet_training
- Join the iCare listserv by sending an e-mail to icare@listserv.ihs.gov

1.0 Introduction

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

The information included in this MU-specific manual covers iCare MU-support functionality enhancements in iCare Version 2.3.3. 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 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.

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 User Desktop (Client) Requirements

iCare software resides on both your facility's RPMS server and on the desktop computer that you use. In order to successfully use iCare, your computer should have the following minimum configuration:

Table 1: Computer configuration for installing iCare

Client PC	Minimum Version
Microsoft Windows (Any Windows OS that supports .NET 2.0 Framework)	Windows XP SP2, Windows 2003 Server, Windows 2000 SP3+, Windows ME, Windows 98/98SE
Microsoft .NET Framework	V2.0
Suggested Client PC Hardware	Processor: Minimum: Pentium III 800MHz; Suggested: Pentium 4 2GHz+ Memory (RAM): Minimum: 256MB; Suggested: 512MB+
Approximate Disk Space Requirements	iCare Application Footprint ~10MB .NET 2.0 Framework ~ 100MB (if not already installed via Windows Updates)

2.0 Meaningful Use (MU) Support in iCare

Meaningful Use (MU) is used to improve the health of the nation. To achieve meaningful use, healthcare providers and hospitals must meet criteria created by the Office of the National Coordinator (ONC) and the Centers for Medicare and Medicaid Services (CMS).

You can find more information about Meaningful Use at the following Web site:
www.ihs.gov/meaningfuluse/

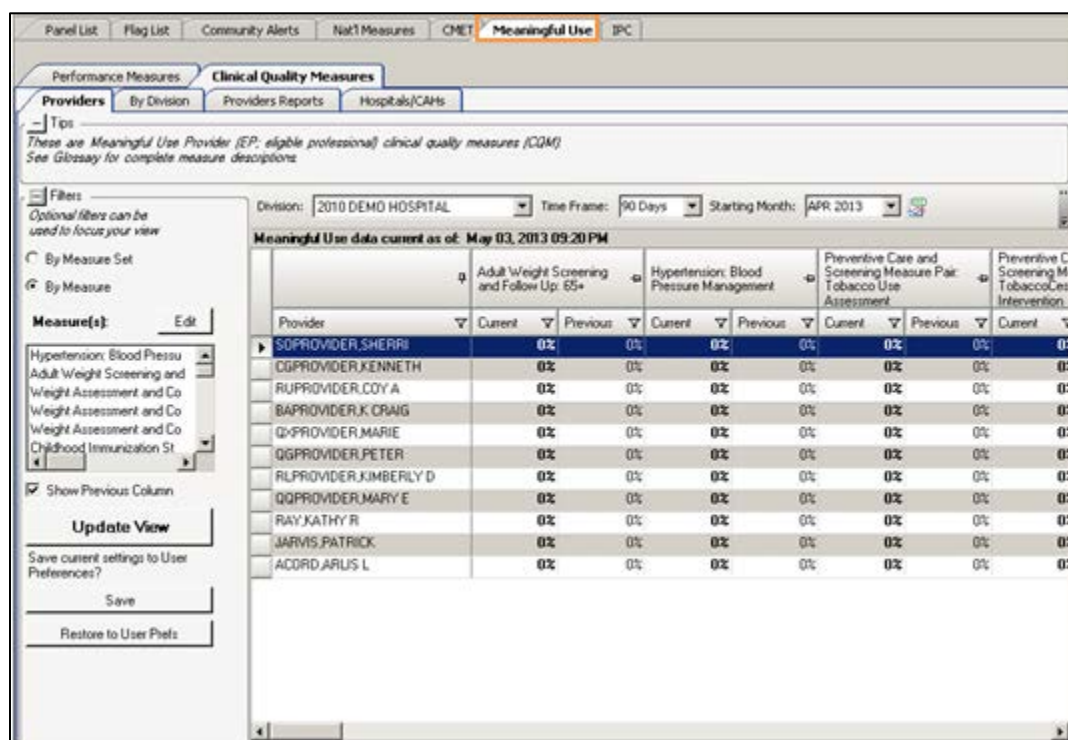


Figure 2-1: Sample Meaningful Use main view (highlighted in red)

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

3.0 User Preferences and Site Parameters

The User Preferences and Site Parameters windows are used to accommodate Meaningful Use support.

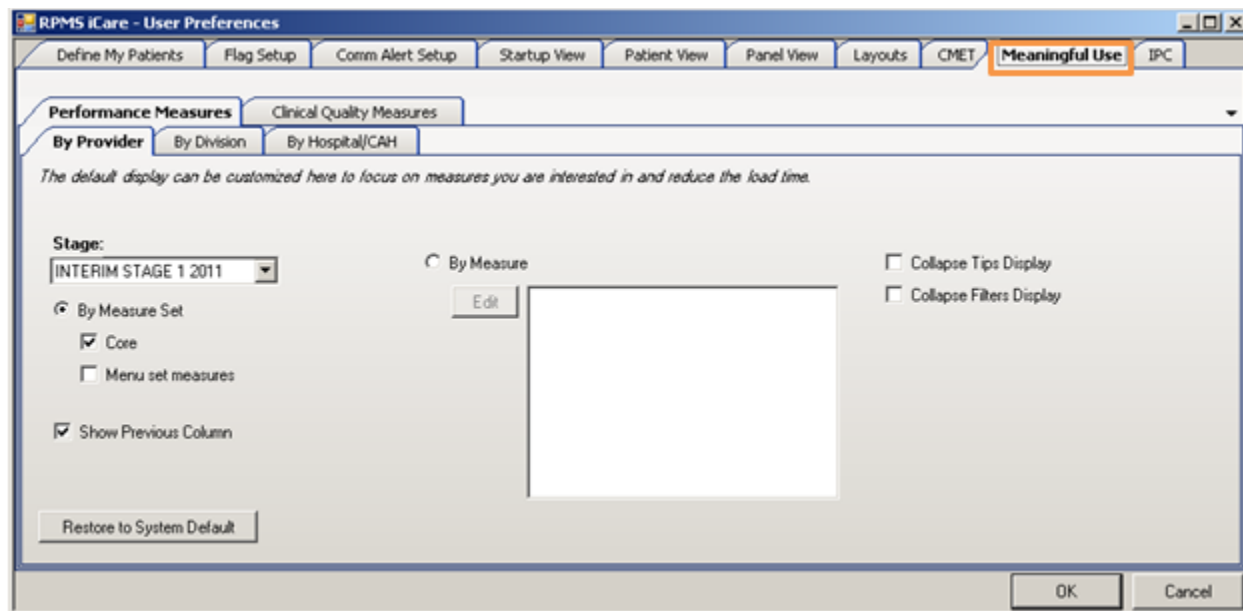


Figure 3-1: Meaningful Use tab on user preferences

After the Meaningful Use tab is complete, click OK to establish the default display for the Meaningful Use window. (Otherwise, click Cancel.)

3.1 Filters for the MU in User Preferences

To define the filters for the MU sub-tabs, you must first select either Performance Measures (PM) or Clinical Quality Measures (CQM).

3.1.1 PM - By Provider Sub-Tab

Select Tools | User Preferences | Meaningful Use tab and then select Performance Measures to access the By Providers sub-tab.

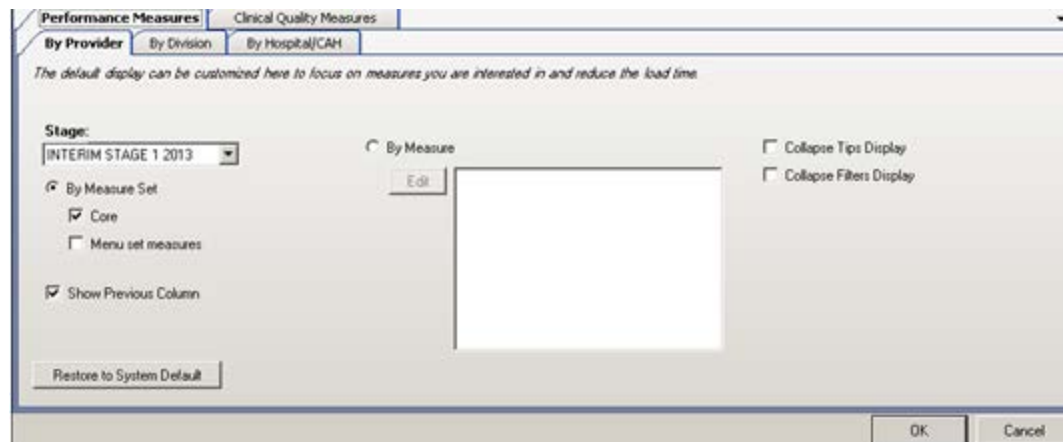


Figure 3-2: Sample By Providers (Performance Measures) user preferences screen

The settings on the By Division and By Hospital/CAH sub-tabs are the same as the By Providers screen (for Performance Measures - PM).

What is selected on this tab is used as the default settings for the filters when using the Performance Measures sub-tab for the Meaningful Use window.

Restore to System Default: click this button to restore the last saved system default

Stage: this determines the stage of the data being displayed. The default is the INTERIM STAGE 1 2013. Select another option from the drop-down list, if needed.

You can select either the “My Measure Set” or the “By Measure” radio button. The selection determines the data being displayed on the Meaningful Use window.

By Measure Set: this determines if the Core and/or Menu set measures are used for the data being displayed.

By Measure: the selections in the field by the Edit button determines the measures data being displayed.

After selecting the By Measure radio button, click Edit to access the Add/Remove MU Providers Measures dialog.

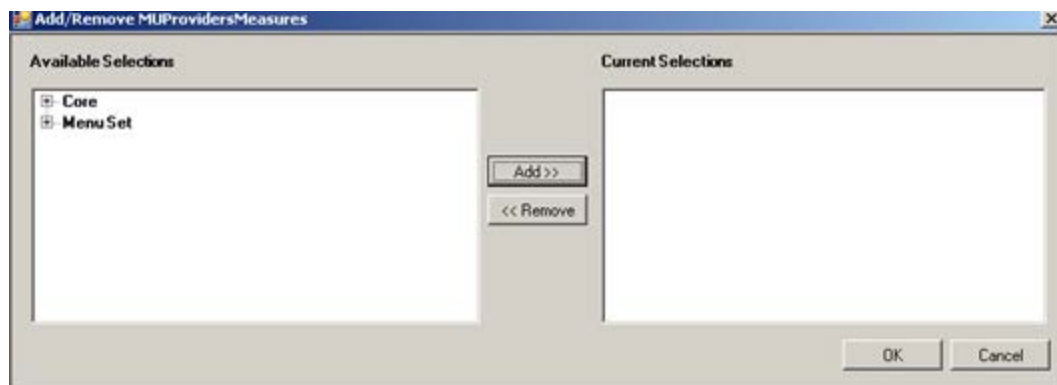


Figure 3-3: Sample Add/Remove MU Providers Measures dialog

You can add options from the Core and/or Menu Set. Expand either selection in order to move items to the Current Selections group box. After the dialog is complete, click OK to have the items in the Current Selections group box populate the By Measure field (on User Preferences for MU).

Show Previous Column: select this check box to show the “Previous” column to display under each measure.

- By selecting this item, both Current and Previous columns will display.
- By not selecting this item, only the Current column will display.

Collapse Tips Display: select this check box to collapse the Tips information on the Meaningful Use window for Performance Measures.

Collapse Filters Display: select this check box to collapse the Filters group box on the Meaningful Use window for Performance Measures.

3.1.2 CQM - Providers

Select Tools | User Preferences | Meaningful Use tab and then select Clinical Quality Measures to access the Providers sub-tab.

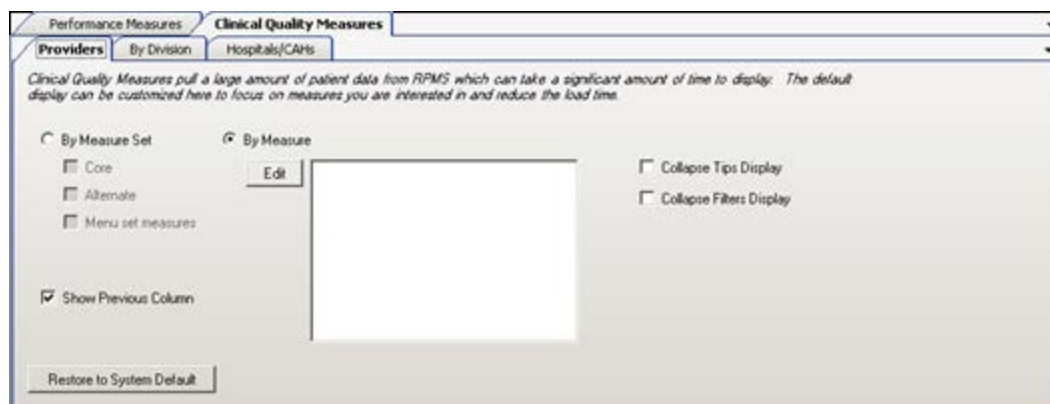


Figure 3-4: Sample Provides (Clinical Quality Measures) sub-tab

The same options display for the By Division sub-tab (for Clinical Quality Measures).

What is selected on this tab is used as the default settings for the filters when using the Clinical Quality Measures sub-tab for the Meaningful Use window.

Return to System Default: click this button to restore the last saved system default.

You can select either the “My Measure Set” or the “By Measure” radio button. The selection determines the data being displayed on the Meaningful Use window.

By Measure Set: this determines if the Core, Alternate, and/or Menu set measures data to be displayed.

By Measure: the selections in the field by the Edit button determines the measures data to be displayed.

After selecting the By Measure radio button, click Edit to access the Add/Remove MU Providers CQ Measures dialog.

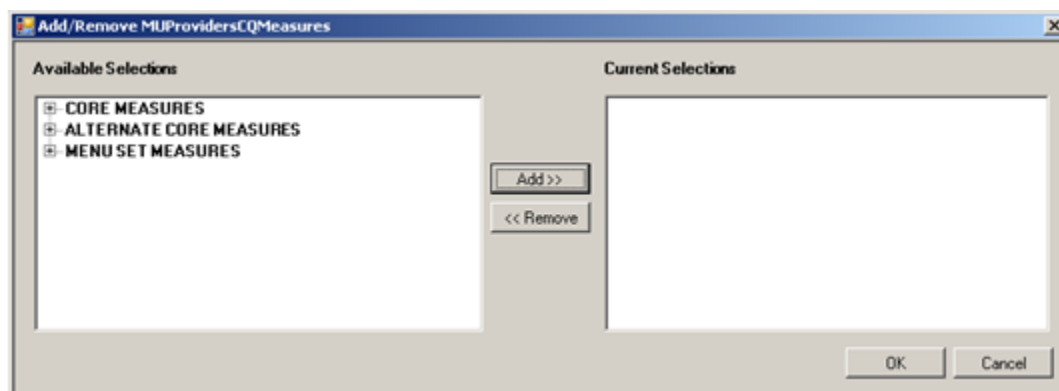


Figure 3-5: Add/Remove MU Providers CQ Measures dialog

You can add options from the Core, Alternate Core Measures, and/or Menu Set Measures. Expand any selection in order to move items to the Current Selections group box. After the dialog is complete, click OK to have the items in the Current Selections group box populate the By Measure field.

Show Previous Column: select this check box to show the “Previous” column to display under each measure.

- By selecting this item, both Current and Previous columns will display.
- By not selecting this item, only the Current column will display.

Collapse Tips Display: select this check box to collapse the Tips information on the Meaningful Use window for Clinical Quality Measures for Providers/Divisions.

Collapse Filters Display: select this check box to collapse the Filters group box on the Meaningful Use tab for Clinical Quality Measures for Providers/Divisions.

3.1.3 CQM – Hospitals/CAHs Sub-Tab

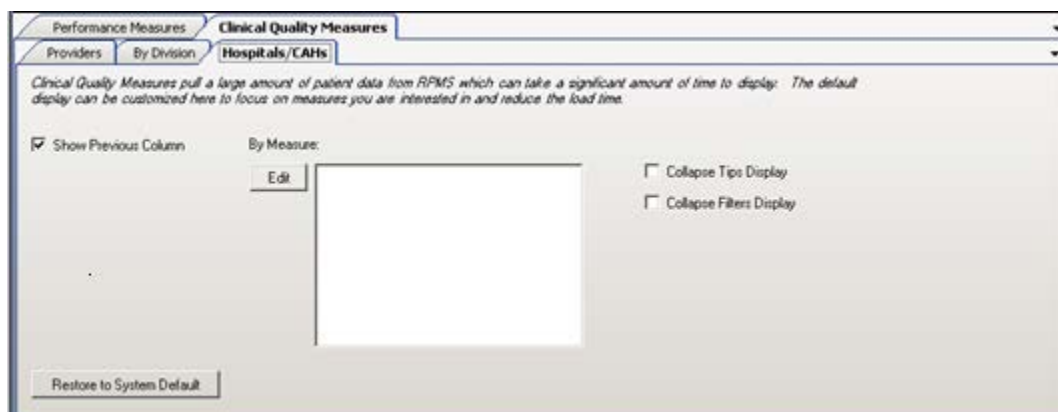


Figure 3-6: Sample Hospitals/CAHs (Clinical Quality Measures) sub-tab

Return to System Default: click this button to restore the last saved system default.

By Measure: the selections in the field determines the measures data to be displayed.

Click Edit by the By Measures field to access the Add/Remove MU Hospital CQM Measures dialog.

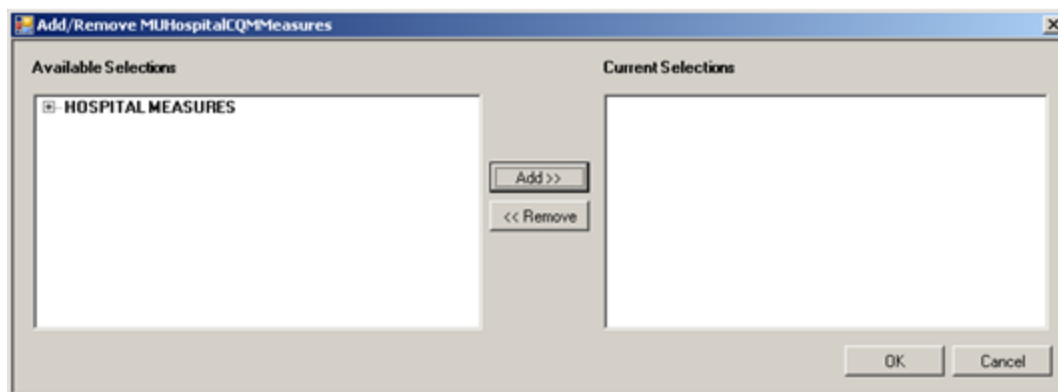


Figure 3-7: Sample Add/Remove MU Hospital CQM Measures dialog

You can add options from the Hospital Measures. Expand the selection in order to move items to the Current Selections group box. After the dialog is complete, click OK to have the items in the Current Selections group box populate the By Measure field.

Show Previous Column: select this check box to display the Previous column in the measures.

- By selecting this item, both Current and Previous columns will display.
- By not selecting this item, only the Current column will display.

Collapse Tips Display: select this check box to collapse the Tips information on the Meaningful Use window for Clinical Quality Measures for Hospitals/CAHs.

Collapse Filters Display: select this check box to collapse the Filters group box on the Meaningful Use window for Clinical Quality Measures for Hospitals/CAHs.

3.2 Site Parameters

The MU Package Manager can access the MU Site Parameters screen by selecting Tools | iCare Site Parameters | MU Site Parameters.

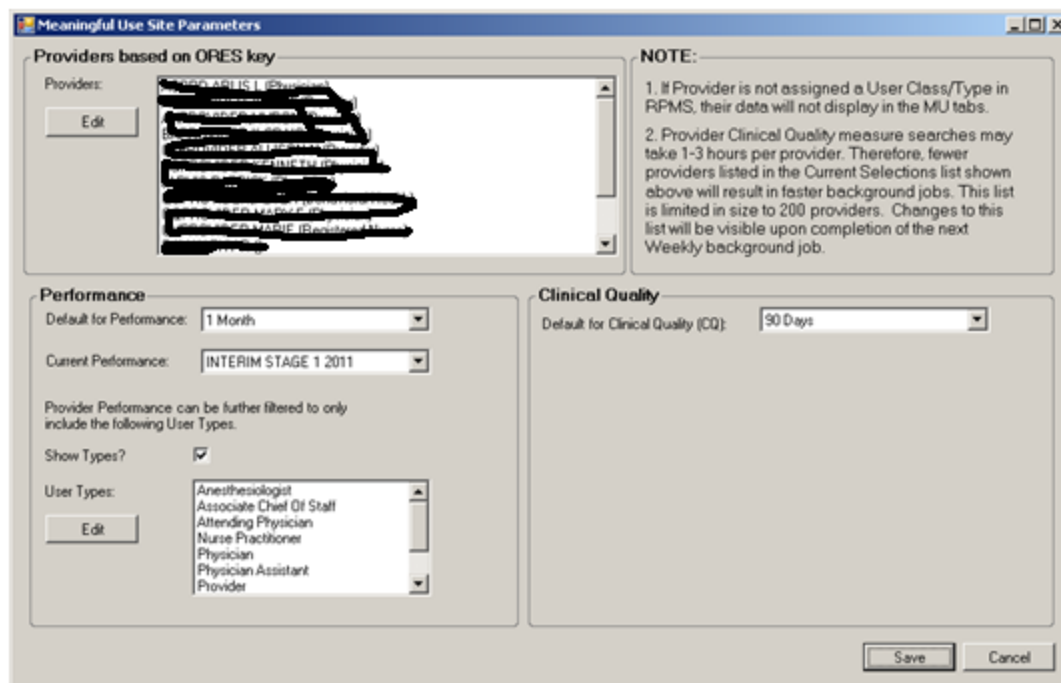


Figure 3-8: MU Site Parameters screen

The user with the ORES security key can do the following:

- Customize the list of Providers that is listed on the By Providers sub-tab of the Meaningful Use window.
- Set the default timeframes for displaying performance and clinical quality (CQ).
- Select whether or not to show the user type and which user types will be displayed on the PM - By Providers and CQM – Providers sub-tabs.

Section 6.9.6 provides information about using the features of the MU Site Parameters screen.

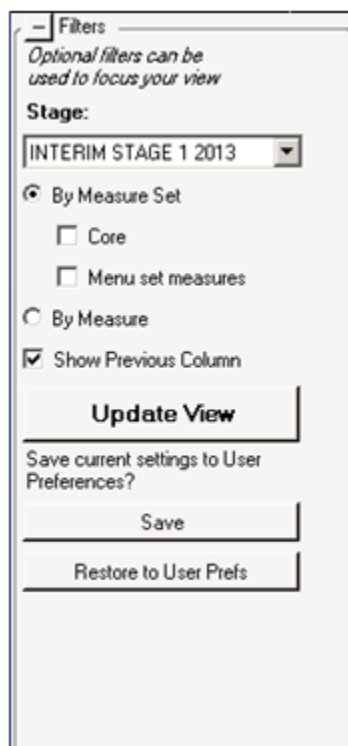
4.0 Meaningful Use Layout

Each sub-tab of the Meaningful Use window will be discussed in this section.

Select either the Performance Measures (PM) or the Clinical Quality Measures (CQM) before selecting the sub-tabs above the grid of data.

4.1 Filters Group Box

The following provides information about the Filters group box.



Filters

Optional filters can be used to focus your view

Stage:

INTERIM STAGE 1 2013

☒ By Measure Set

☐ Core

☐ Menu set measures

☐ By Measure

☒ Show Previous Column

Update View

Save current settings to User Preferences?

Save

Restore to User Prefs

Figure 4-1: Filters group box

Stage

Select an option from the drop-down list to determine the Stage of the data being displayed.

By Measure Set radio button

If you select the “By Measure Set” radio button, you must select the “Core” and/or “Menu set measures” to determine the measurements displayed in the grid of data.

By Measure radio button

If you select the “By Measure” radio button, you must define the measurements to be displayed in the grid of data.



Figure 4-2: By Measure radio button option

After selecting the By Measure radio button, click Edit to access the Add/Remove MU Measures dialog.

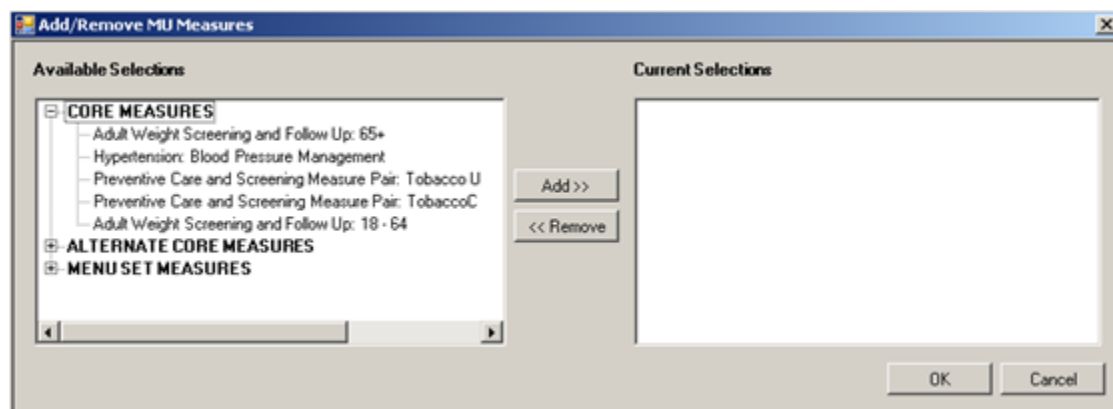


Figure 4-3: Sample Add/Remove Measures dialog

You can add items from the Core, Alternate Core Measures, and/or Menu Set. Measures to the Current Selections group box by clicking Add. After the dialog is complete, click OK to have the items in the Current Selections group box populate the Measure(s) field (on the Filter group box).

Show Prev Column Check box

Select the “Show Prev Column” check box to cause the “Previous” column to display under each measure.

Update View Button

Click Update View to cause the data in the right panel to be updated.

Save Button

You can save the current filter selections and have them saved in your User Preferences by clicking Save.

Restore to User Prefs Button

Click Restore to User Prefs to have the user preferences restored to the last saved ones.

4.2 PM – By Provider Sub-Tab

The list in the Provider column are the meaningful use providers.

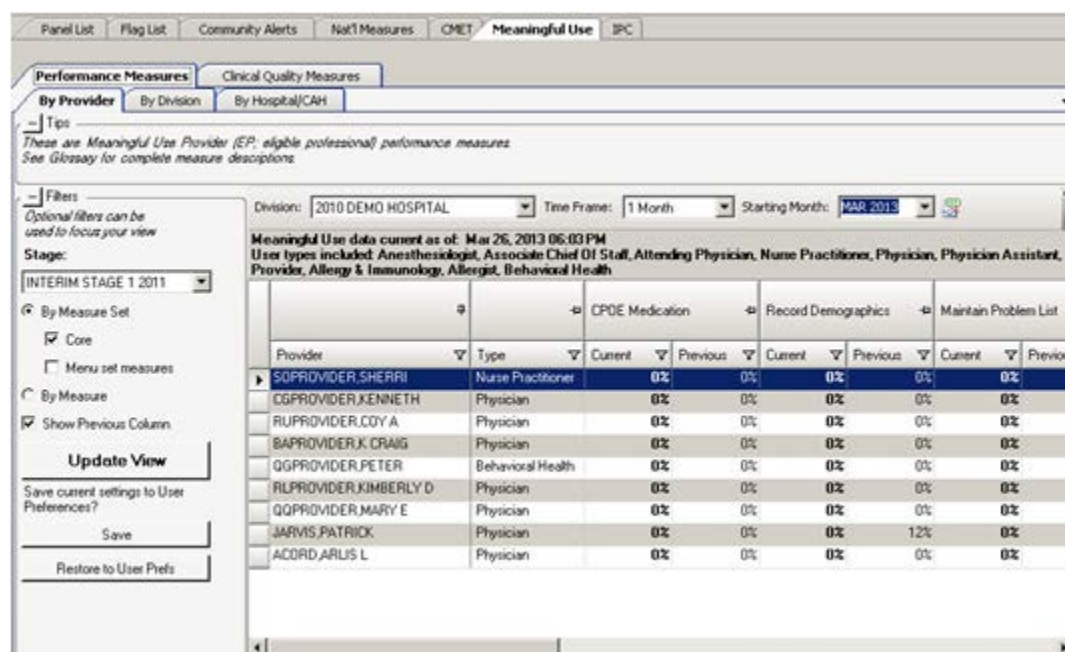



Figure 4-4: Sample By Providers (Performance Measures) sub-tab

The data displayed in the grid is determined by the Division, Time Frame, and Starting Month fields as well as the options in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.1 provides information about the user preferences for this sub-tab.

Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Once the Filters have been established, you can save them as the current settings to User Preferences by clicking Save. Likewise, you can return to the last saved user preferences by clicking Return to User Prefs.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides information about using the features on the pop-up window.

4.3 PM – By Division Sub-Tab

The date displayed above the grid is from the most recent background job.

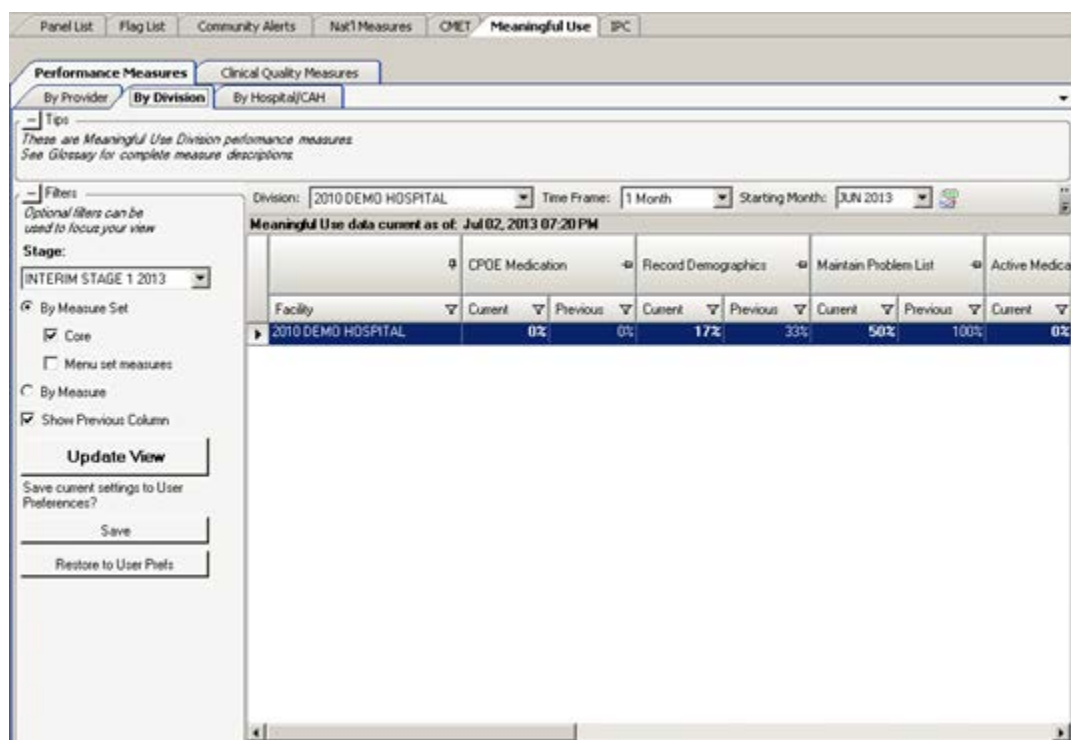



Figure 4-5: Sample By Division (Performance Measures) sub-tab

The data is determined by the Division, Time Frame, and Starting Month fields as well as the options selected in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.1 provides information about the user preferences for this sub-tab.

Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides more information about using the features of the pop-up window.

4.4 PM – By Hospital/CAH Sub-Tab

The date displayed above the grid is from the most recent background job.

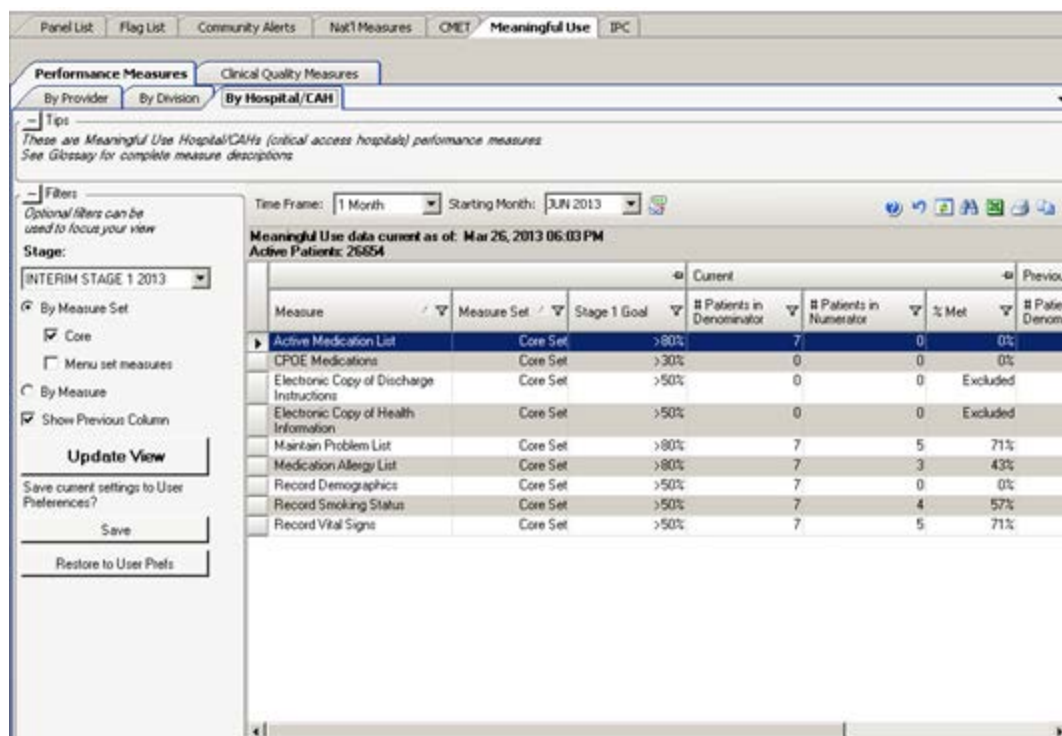



Figure 4-6: Sample By Hospital/CAH (Performance Measures) sub-tab

The data displayed in the grid is determined by the Time Frame and Starting Month fields as well as the options selected in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.1 provides information about the user preferences for this sub-tab.

Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides more information about using the features of the pop-up window.

The buttons on the right-side of the window operate like those on other iCare windows. Section 6.11 provides information about using these buttons.

4.5 CQM - Providers Sub-Tab

The date displayed above the grid is from the most recent background job.

Meaningful Use data current as of: May 03, 2013 09:20 PM

Provider	Adult Weight Screening and Follow Up: 65+	Hypertension: Blood Pressure Management	Preventive Care and Screening Measure Pair: Tobacco Use Assessment	Preventive Care and Screening Measure Pair: Tobacco Cessation Intervention	Adult Weight Score and Follow Up: 18
CGPROVIDER.KENNETH	0%	0%	0%	0%	0%
RUPROVIDER.COY A	0%	0%	0%	0%	0%
BAPROVIDER.K CRAIG	0%	0%	0%	0%	0%
QPROVIDER.MARIE	0%	0%	0%	0%	0%
QPROVIDER.PETER	0%	0%	0%	0%	0%
RLPROVIDER.KIMBERLY D	0%	0%	0%	0%	0%
QPROVIDER.MARY E	0%	0%	0%	0%	0%
	0%	0%	0%	0%	0%
	0%	0%	0%	0%	0%
	0%	0%	0%	0%	0%


Figure 4-7: Sample CQM layout for Providers

The data displayed in the grid is determined by the Division, Time Frame, and Starting Month fields as well as the options selected in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.2 provides information about the user preferences for this sub-tab.

Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

The columns can be sorted and/or filtered. You cannot move the columns from one objective to another, however. But you can move the columns within one objective. For example, you could move the Current and Previous columns under the CPDE Medication objective.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides more information about using the features of the pop-up window.

The buttons on the right-side of the window operate like those on other iCare windows. Section 6.11 provides information about using these buttons.

4.6 CQM - By Division Sub-Tab

The CQM – By Division sub-tab displays the clinical quality measures by division.

Panel List

Flag List

Community Alerts

Nat'l Measures

CHET

Meaningful Use

IPC

Performance Measures

Clinical Quality Measures

Providers

By Division

Providers Reports

Hospitals/CAHs

Tips

Divison: 2010 DEMO HOSPITAL

Time Frame: 90 Days

Starting Month: APR 2013

Meaningful Use data current as of: May 03, 2013 09:20 PM


	Adult Weight Screening and Follow Up: 65+	Hypertension: Blood Pressure Management	Preventive Care and Screening Measure Pair: Tobacco Use Assessment	Preventive Care and Screening Measure Pair: Tobacco Cessation Intervention	Adult Weight Screening and Follow Up: 18					
Facility	Current	Previous	Current	Previous	Current	Previous	Current	Previous	Current	Previous
2010 DEMO HOSPITAL	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Figure 4-8: Sample CQM - By Divisions sub-tab

The data displayed in the grid is determined by the Division, Time Frame, and Starting Month fields as well as the options selected in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.2 provides information about the user preferences for this sub-tab.

Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides more information about using the features of the pop-up window.

The buttons on the right-side of the window operate like those on other iCare windows. Section 6.11 provides more information about these buttons.

4.7 CQM - Providers Reports Sub-Tab


This sub-tab show the MU provider clinical quality measures.

Provider	Adult Weight Screening and Follow Up: 65+	Adult Weight Screening and Follow Up: 18 - 64	Preventive Care and Screening Measure Pair: Tobacco Cessation Intervention	Preventive Care and Screening Measure Pair: Tobacco Use Assessment	Hypertension: Blood Pressure Management
AAPROVIDER.LADSON	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.EUGENIA	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.LADSON D	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.LADSON D	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.EUNICE ENS	NDA	NDA	NDA	NDA	NDA
ACORD ARLIS L (Physician)	NDA	NDA	NDA	NDA	NDA
ACPROVIDER.CORY A	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.GAYLE W	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.JAMES D	NDA	NDA	NDA	NDA	NDA
ABPROVIDER.EUNICE ENSLEY	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.LUCINDA SUE	NDA	NDA	NDA	NDA	NDA
ADPROVIDER.LISA	NDA	NDA	NDA	NDA	NDA
AAPROVIDER.JERRI RENEE	NDA	NDA	NDA	NDA	NDA

Figure 4-9: Sample Providers Reports sub-tab

You must select the providers in the Provider(s) group box of the Parameters panel. Also, you must specify the Starting Date, as well as select the By Measure Set or By Measure radio button. Section 4.8 provides information about using the Parameters panel.

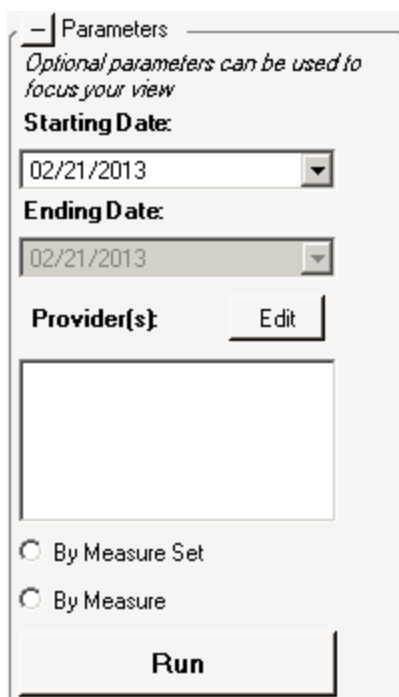
Hover help is available for each of the measures. Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides information about using the features of the pop-up window.

The buttons on the right-side of the window operate like those on other iCare windows. Section 6.11 provides information about using these buttons.

4.8 Parameters Panel

The parameters panel defines the optional parameters that can be used to focus the data displayed on the Provider Reports sub-tab. This feature is similar to the Filters panel on other sub-tabs.



Parameters

Optional parameters can be used to focus your view

Starting Date:
02/21/2013

Ending Date:
02/21/2013

Provider(s): Edit

☐ By Measure Set

☐ By Measure

Run

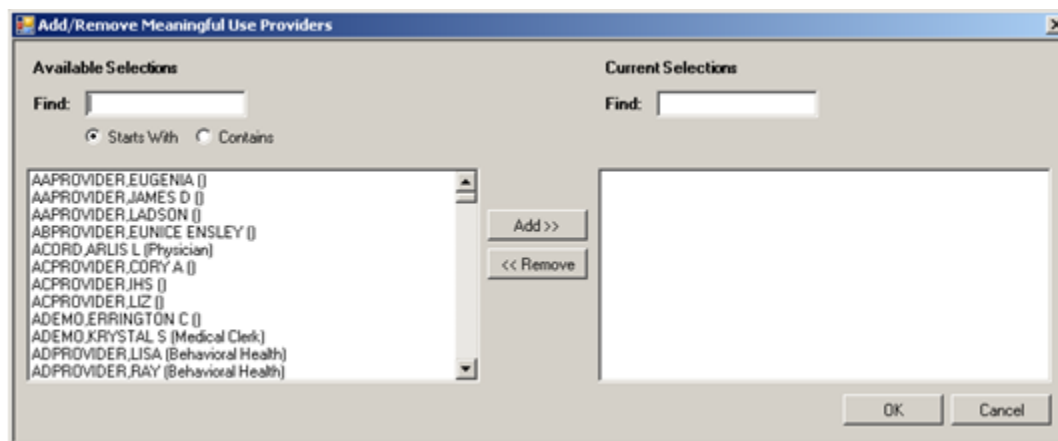
Figure 4-10: Sample Parameters panel

4.8.1 Starting Date

The Starting Date and Ending Date define the date range for the data on the Providers Reports sub-tab. Change the Starting Date by selecting a date from the calendar on the drop-down list.

4.8.2 Provider(s)

This field determines the providers to be used on the data for the Providers Reports sub-tab. Click Edit to access the Add/Remove Meaningful Use Providers dialog.



Add/Remove Meaningful Use Providers

Available Selections

Find:

☒ Starts With ☐ Contains

AAPROVIDER,EUGENIA ()
 AAPROVIDER,JAMES D ()
 AAPROVIDER,LADSON ()
 ABPROVIDER,EUNICE ENSLEY ()
 ACORD,ARLIS L (Physician)
 ACPROVIDER,CORY A ()
 ACPROVIDER,JHS ()
 ACPROVIDER,LIZ ()
 ADEMO,ERRINGTON C ()
 ADEMO,KRYSTAL S (Medical Clerk)
 ADPROVIDER,LISA (Behavioral Health)
 ADPROVIDER,RAY (Behavioral Health)

Current Selections

Find:

Add >> << Remove

OK Cancel

Figure 4-11: Sample Add/Remove Meaningful Use Providers dialog

The names displayed below the Available Selections field are Meaningful Use provides with clinical quality measures.

You can add one or more selected names from the Available Selections group box to the Current Selections group box by clicking Add. In addition, the Find field in the Available Selections area provides filters for searching for the provider name.

After the dialog is complete, click OK to have the names in the Current Selections group box populate the Provider(s) field (on the Parameters panel).

4.8.3 Radio Buttons

You can use either the By Measure Set or the Measure Set radio button.

4.8.3.1 By Measure Set

By Measure Set: this determines if the Core, Alternate, and/or Menu Set Measures are used for the data to be displayed.

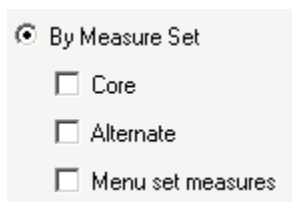


Figure 4-12: Options for By Measure Set radio button

4.8.3.2 By Measure

By Measure: the selections in the field by the Edit button determines the measures data to be displayed.

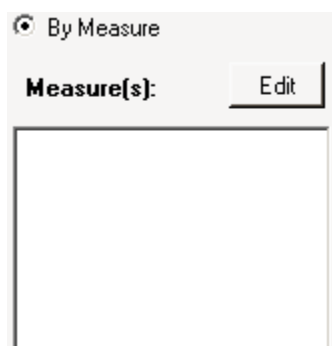


Figure 4-13: By Measure radio button selection

After selecting the By Measure radio button, click Edit to access the Add/Remove MU Measures dialog.

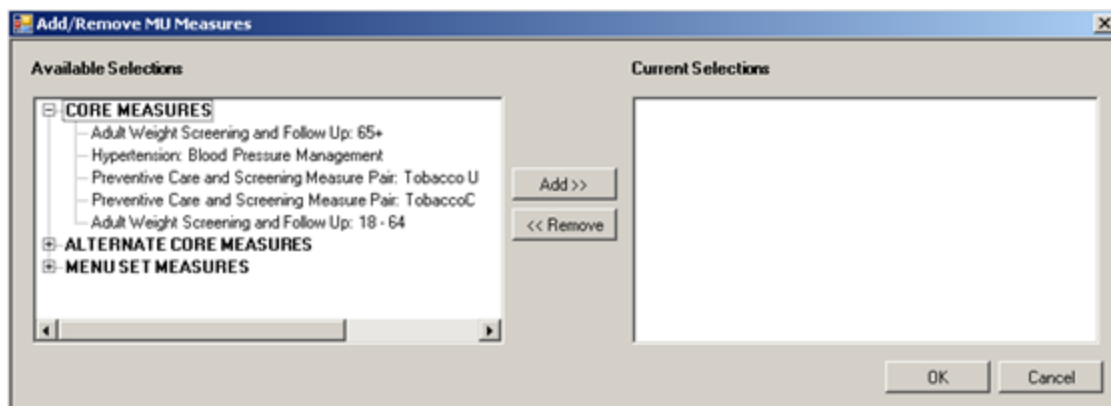


Figure 4-14: Sample Add/Remove MU Measures dialog

You can add items from the Core, Alternate Core Measures, and/or Menu Set. Measures to the Current Selections group box by clicking Add. After the dialog is complete, click OK to have the items in the Current Selections group box populate the Measure(s) field (on the Parameters panel).

4.8.4 Run

After the Parameters panel is complete, click Run to run the providers reports. The application displays the “Running Report” message indicating that the report is being processed. The data will display in the right panel of the Providers Reports window.

4.9 CQM - Hospitals/CAHs Sub-Tab

The date displayed above the grid is from the most recent background job.

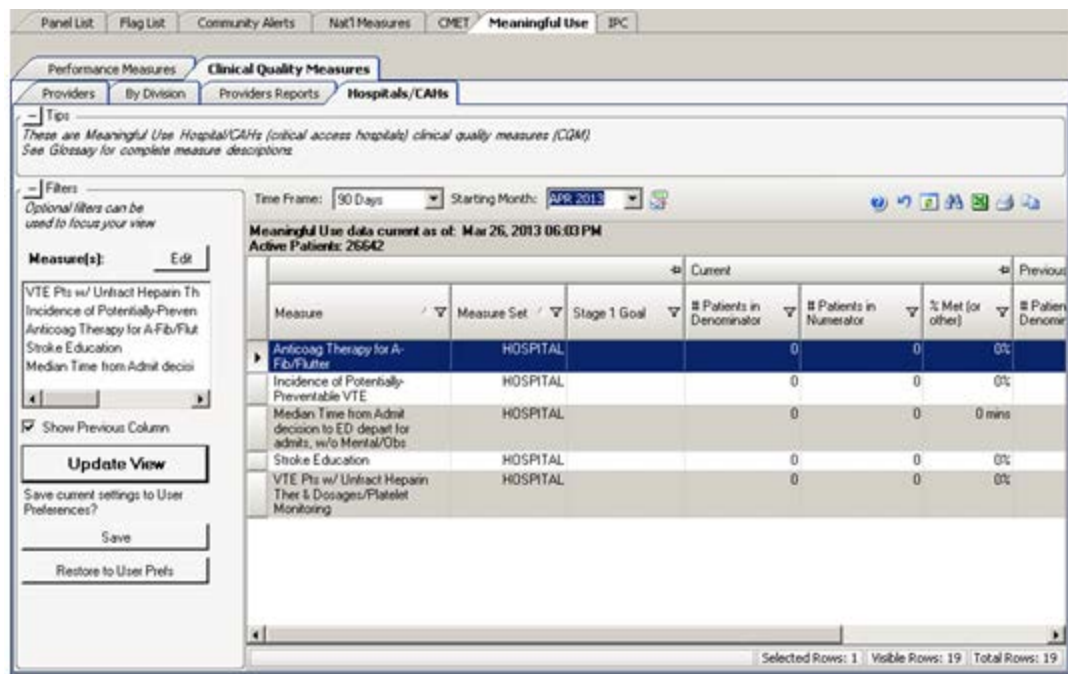



Figure 4-15: Sample CQM Hospitals/CAHs sub-tab

The data is determined by the Time Frame and Starting Month fields and the filters selected in the Filters group box. Section 4.1 provides information about using the Filters group box.

Section 3.1.3 provides information about the user preferences for this sub-tab.

Hover help displays for each measure (in the Measure column). Select Help | Meaningful Use Glossary to access the glossary that provides information about the measures.

Click the Background Jobs  button (or select File | Background Jobs) to display the Background Jobs pop-up. Section 6.3 provides more information about this pop-up.

The buttons on the right-side of the window operate like those on other iCare windows. Section 6.11 provides more information about these buttons.

4.10 MU Glossary

The MU Glossary provides information about each of the measurements displayed on the various MU sub-tabs.

Select Help | Meaningful Use Glossary to view the information.

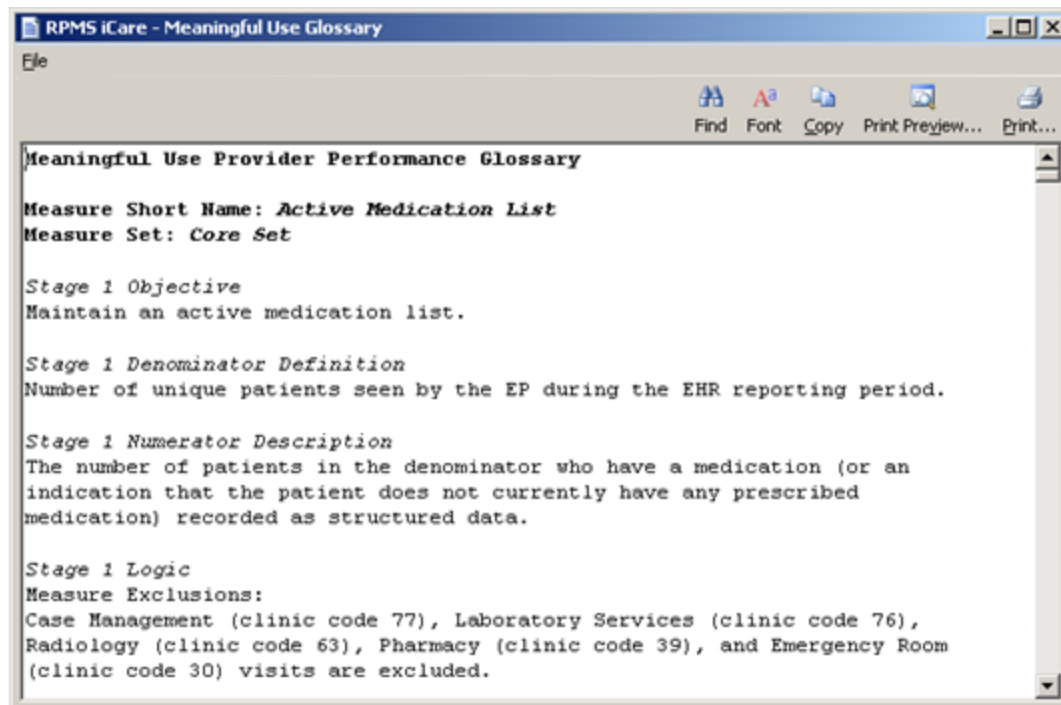


Figure 4-16: Meaningful Glossary information

5.0 Meaningful Use Menus

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

5.1 File Menu

Below are the options on the File menu:

Meaningful Use: The sub-menus for this option contain the following actions for each sub-tab:

- Glossary is used to access the National Measures Glossary. Section 6.2 provides information about the glossary window.
- Reset View is used to return the current view to the default view. You 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 2.3 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 Meaningful Use window 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 pane. 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:

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 Meaningful Use glossary. This is the same as selecting Help | Meaningful Use 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.

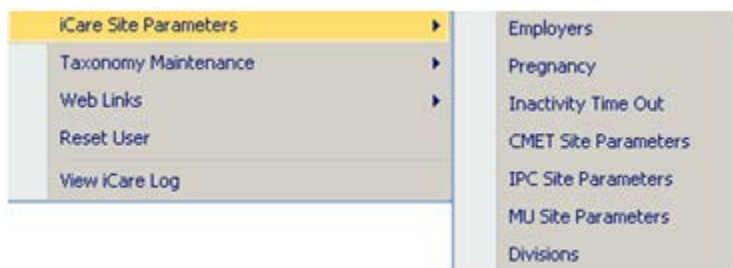


Figure 5-1: iCare Site Parameters options

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 Meaningful Use

The following provides information about using the iCare features for the Meaningful Use view.

6.1 User Preferences

This section focuses on the user preferences that are used by the Meaningful Use window.

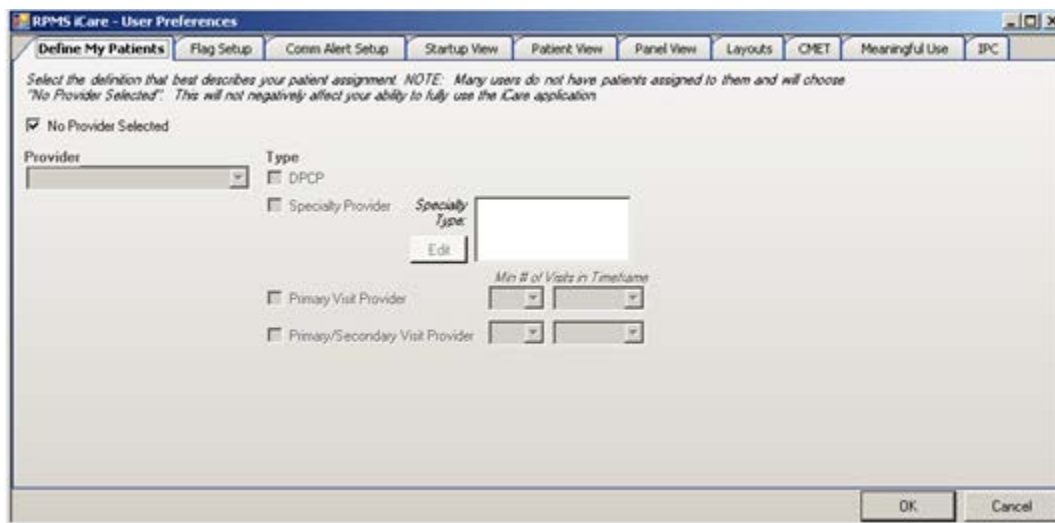


Figure 6-1: Sample User Preferences window

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

6.1.1 Meaningful Use Tab

Section 3.1 provides information about the Meaningful Use tab of User Preferences.

6.1.2 Startup View

You can determine the startup view when opening iCare. Select the Meaningful Use radio button and then determine two other options.

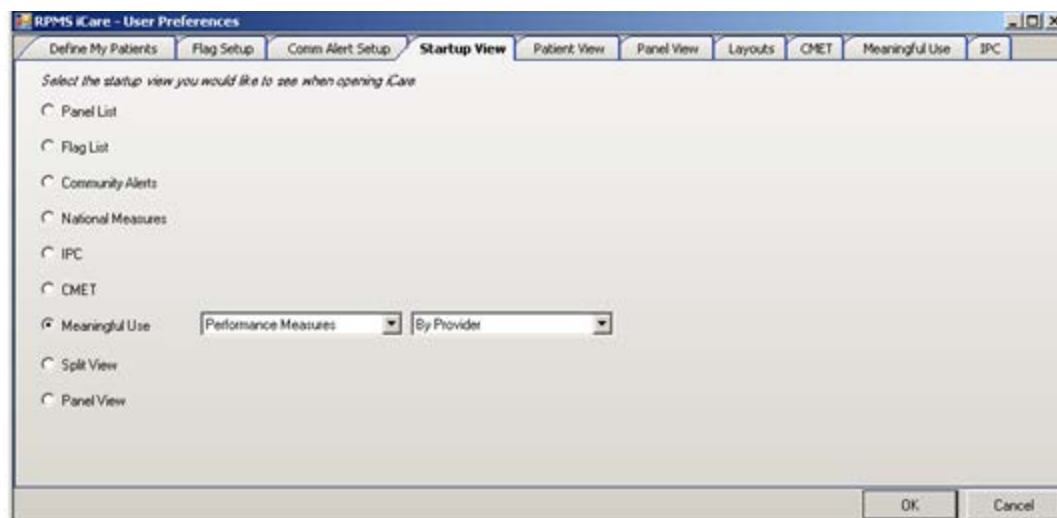


Figure 6-2: Options for the Meaningful Use that determines the startup view

The first option for Meaningful Use contains the following selections: Performance Measures or Clinical Quality Measures.

The second option for Meaningful Use varies according to what is selected in the first option.

- If Performance Measures is selected for the first option, then the selections for the second option are: By Provider, By Hospital/CAH, or By Division.
- If the Clinical Quality Measures is selected for the first option, then the selections for the second option are: Providers, Hospital/CAH, Providers Reports, or By Division.

6.2 Meaningful Use Glossary

This pop-up provides information about each of the measures.

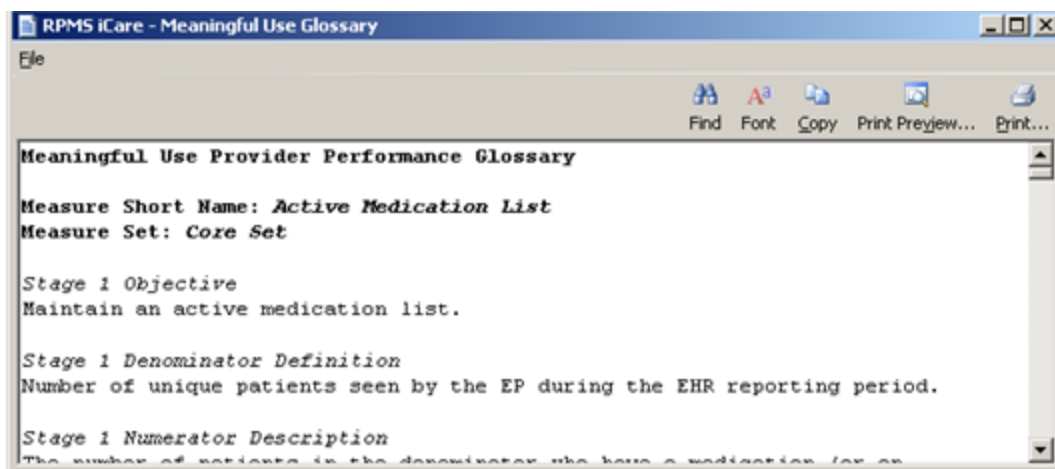



Figure 6-3: Meaningful Use Glossary pop-up window

Section 6.7 provides information about using the controls on the pop-up window.

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
NIGHTLY	Best Practice Prompts	Apr 12, 2011 10:07 AM	Apr 12, 2011 10:07 AM		Apr 13, 2011 04:00 PM
	Care Mgmt Update	Apr 12, 2011 10:07 AM	Apr 12, 2011 10:07 AM		Apr 13, 2011 04:00 PM
	CMET Data Mining	Apr 12, 2011 10:07 AM	Apr 12, 2011 10:15 AM		Apr 13, 2011 04:00 PM
	Comm Alerts	Apr 12, 2011 09:34 AM	Apr 12, 2011 09:52 AM		Apr 13, 2011 04:00 PM
	Diagnostic Tags	Apr 12, 2011 09:52 AM	Apr 12, 2011 09:52 AM		Apr 13, 2011 04:00 PM
	Flags	Apr 12, 2011 09:26 AM	Apr 12, 2011 09:34 AM		Apr 13, 2011 04:00 PM
WEEKLY	Natl Measures	Apr 12, 2011 09:52 AM	Apr 12, 2011 10:07 AM		Apr 13, 2011 04:00 PM
	Panel Autopopulate	Apr 12, 2011 10:15 AM	Apr 12, 2011 10:16 AM		Apr 13, 2011 04:00 PM
	Reminders	Apr 12, 2011 10:07 AM	Apr 12, 2011 10:07 AM		Apr 13, 2011 04:00 PM
	Best Practice Prompts	Apr 08, 2011 09:00 PM	Apr 09, 2011 06:21 AM		Apr 15, 2011 09:00 PM
	Care Mgmt Update	Apr 06, 2011 09:00 PM	Apr 07, 2011 05:59 AM		Apr 13, 2011 09:00 PM
	Diagnostic Tags	Apr 12, 2011 09:26 AM	Apr 12, 2011 11:13 AM		Apr 18, 2011 08:00 PM
WEEKLY	Meaningful Use Update	Apr 12, 2011 09:28 AM	Apr 12, 2011 12:11 PM		Apr 23, 2011 10:00 PM
	Natl Measures	Apr 12, 2011 11:13 AM	Apr 12, 2011 01:09 PM		Apr 18, 2011 08:00 PM
	Reminders	Apr 07, 2011 07:00 PM	Apr 08, 2011 07:05 AM		Apr 14, 2011 07:00 PM

Figure 6-4: 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 is used to output the data in 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.

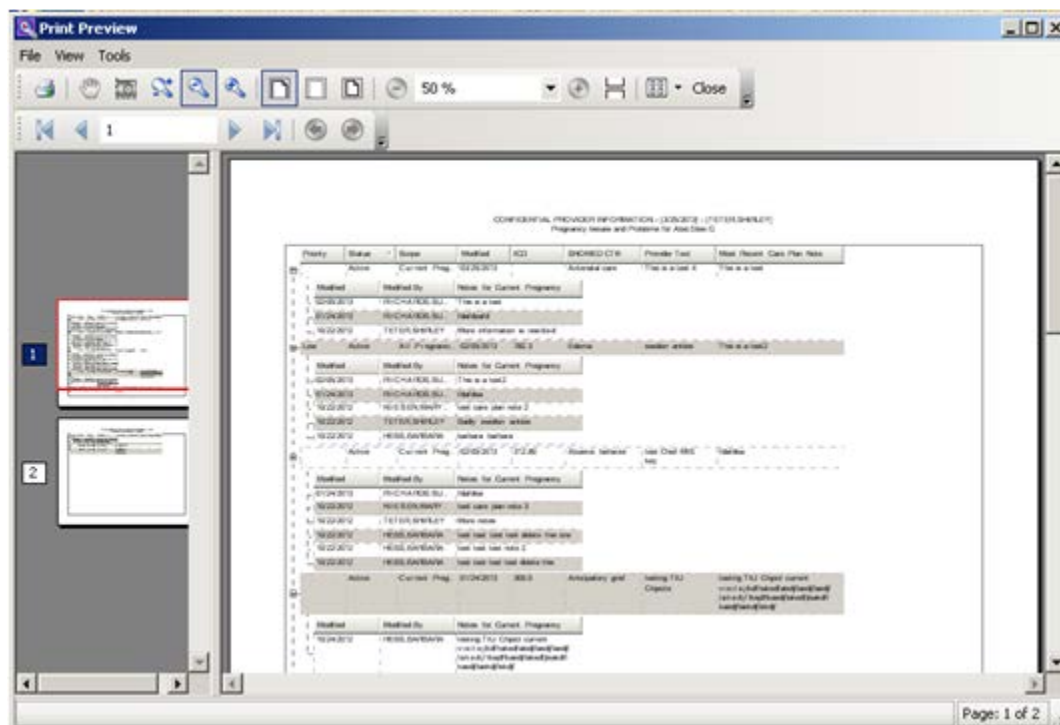















Figure 6-5: Sample Print Preview dialog

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.
	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.

Button	Description
	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 6-6: 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.

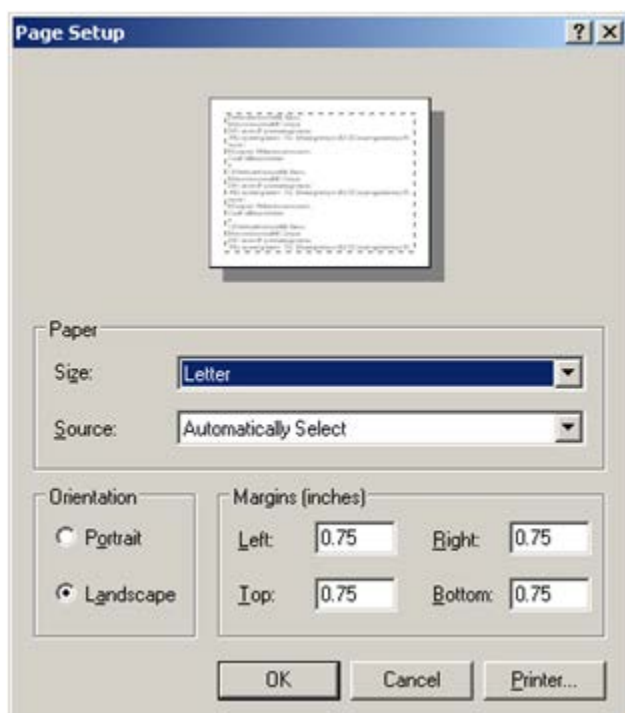


Figure 6-7: Sample Page Setup dialog

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 6-8: iCare Package Manager Functions

6.5.1 iCare User Access Management

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

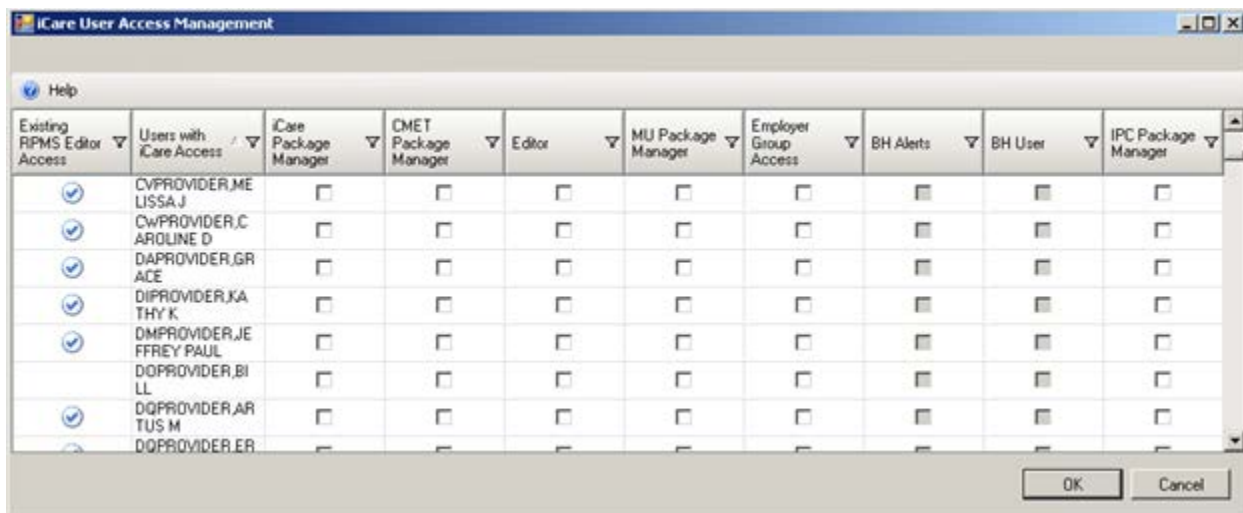


Figure 6-9: Sample iCare User Access Management dialog

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


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 Alerts and BH User columns 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 "Users 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:

- PCC Historical Data Entry
- Care Management data
- Family History and Reproductive Factors (Snapshot)
- Designated Specialty Provider Management system (DSPM)
- Problem List
- 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.

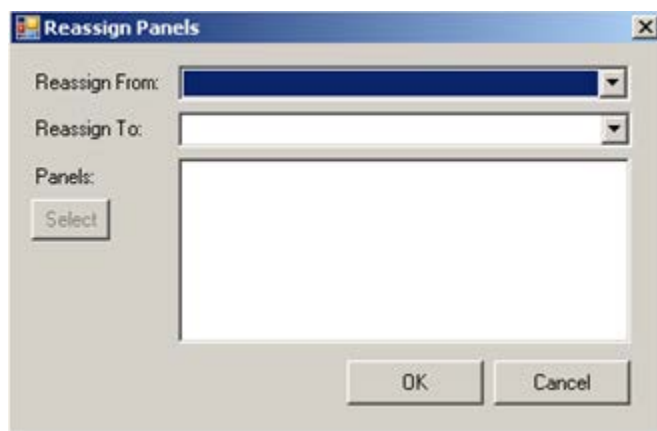


Figure 6-10: Reassign Panels Dialog

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.

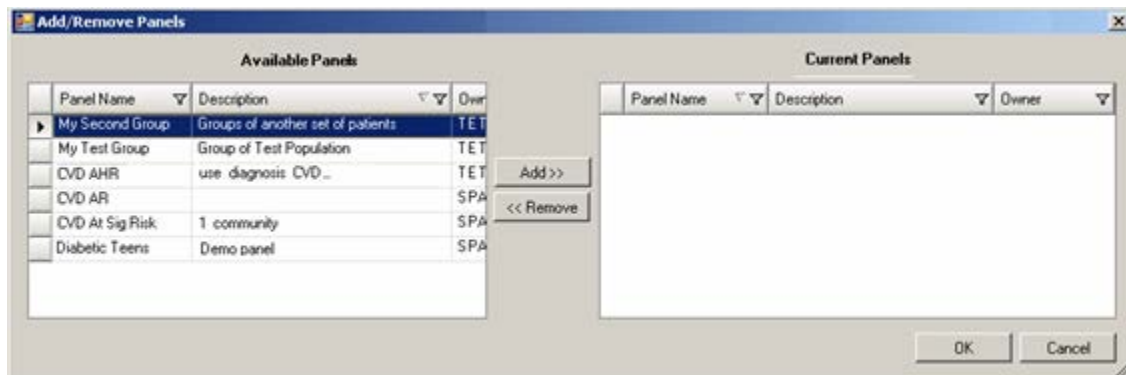


Figure 6-11: Sample Add/Remove Panels dialog

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 Panels 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 6-12: 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.

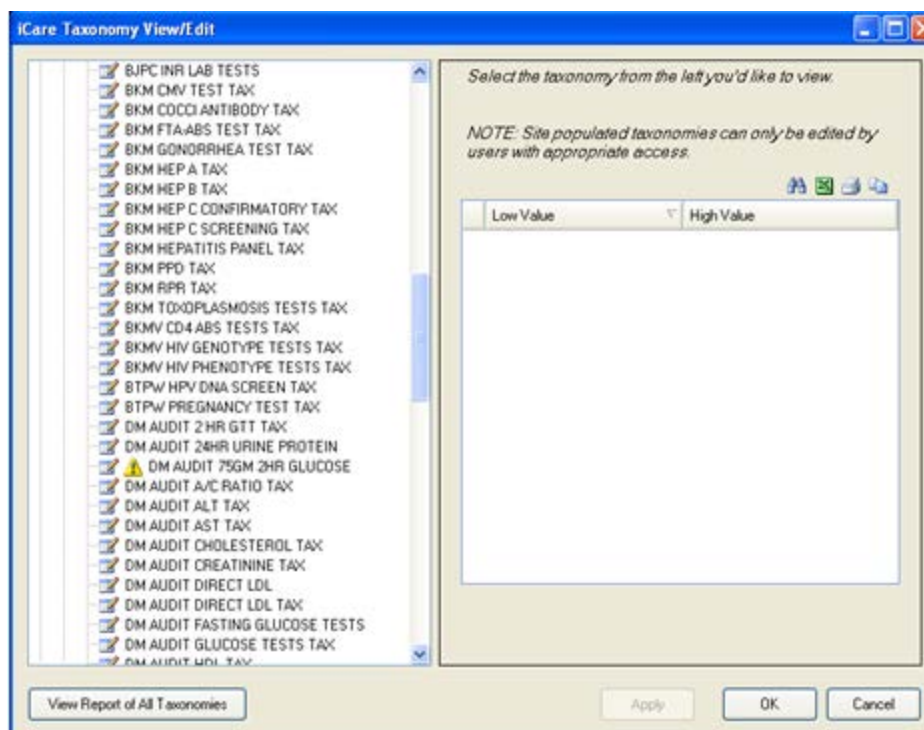


Figure 6-13: Sample iCare Taxonomy View/Edit dialog

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.

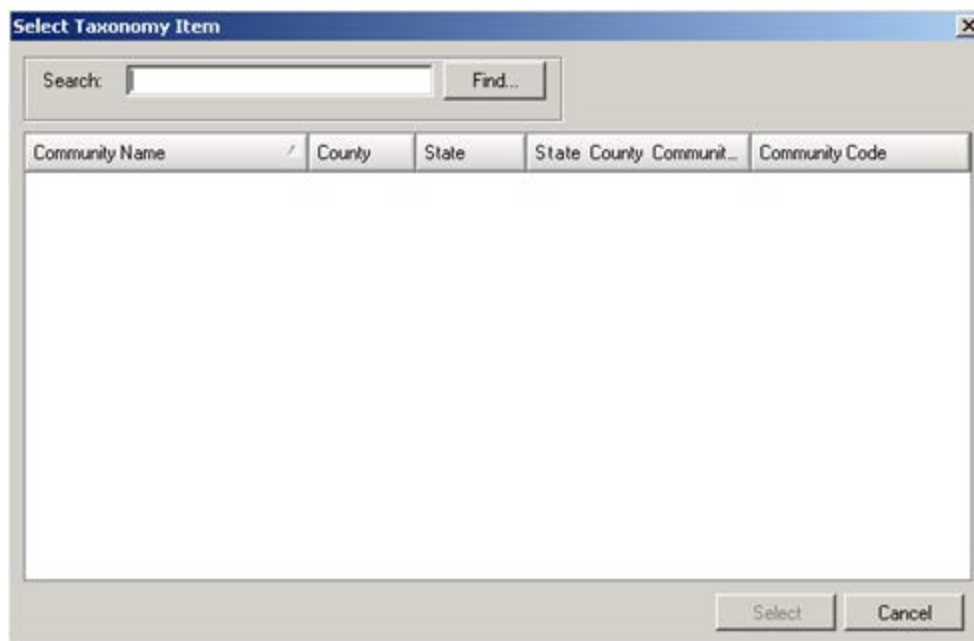


Figure 6-14: Select Taxonomy Item dialog

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.

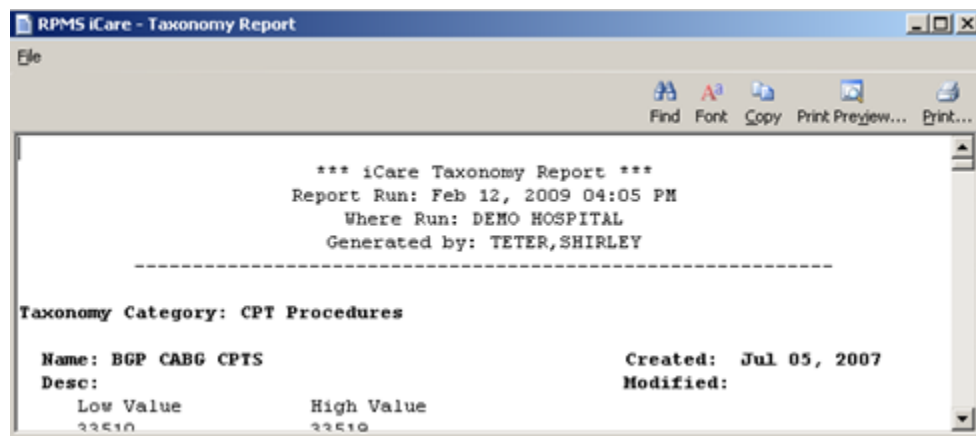


Figure 6-15: Taxonomy Report

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

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

6.6.2 Taxonomy User Access

Editing site populate 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.

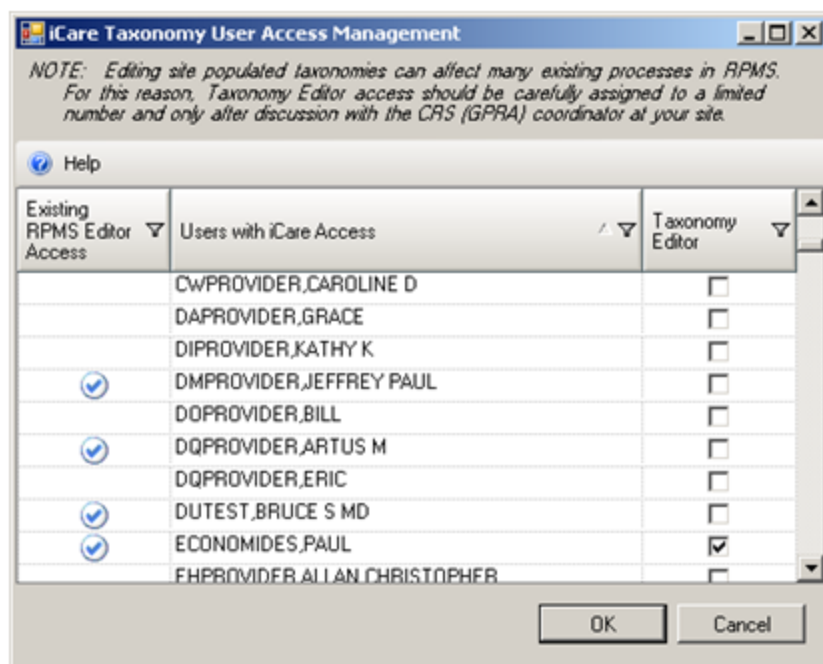


Figure 6-16: Sample iCare Taxonomy User Access Management dialog

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.

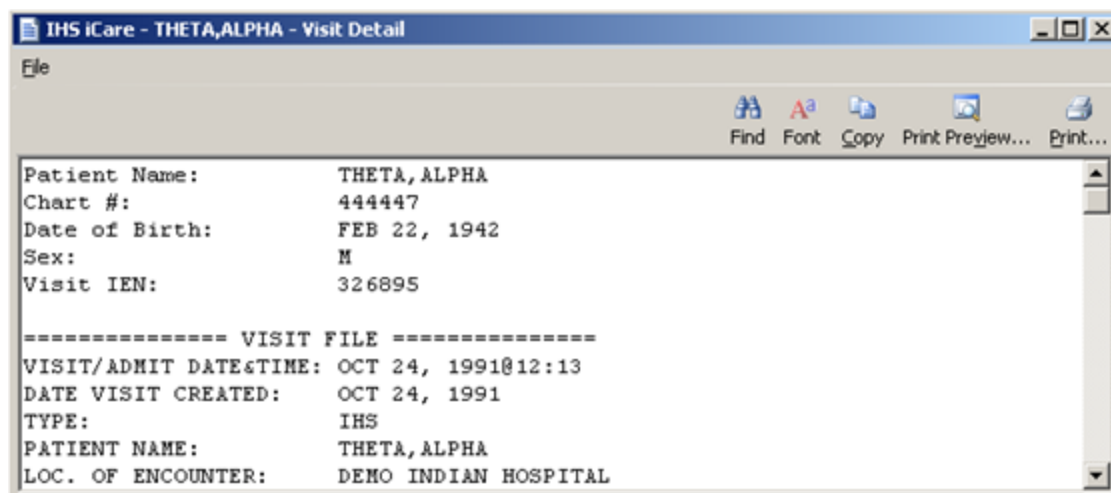




Figure 6-17: Sample Visit Detail Pop-up

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.

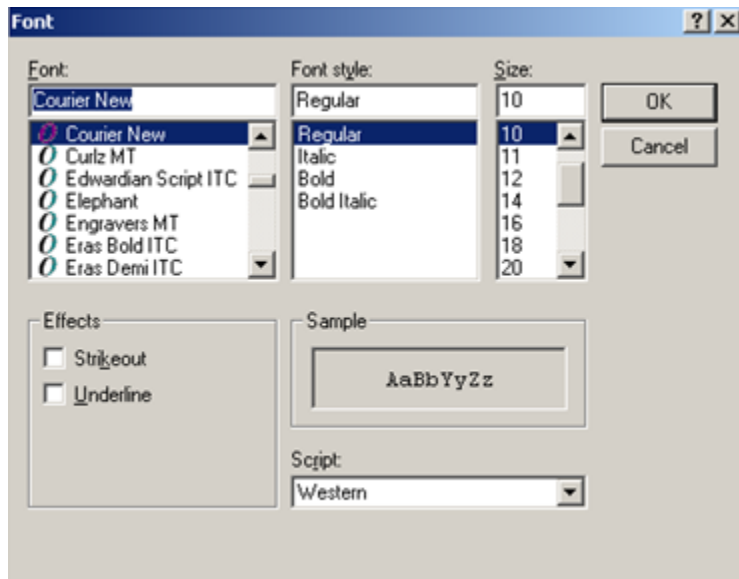





Figure 6-18: Font Dialog

Use the Font dialog to 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 to display the text in another language and that language pack is installed on your computer. If the language pack is not installed, the display does not change by selecting another script.

Click OK to apply the 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 2.3 Login dialog.

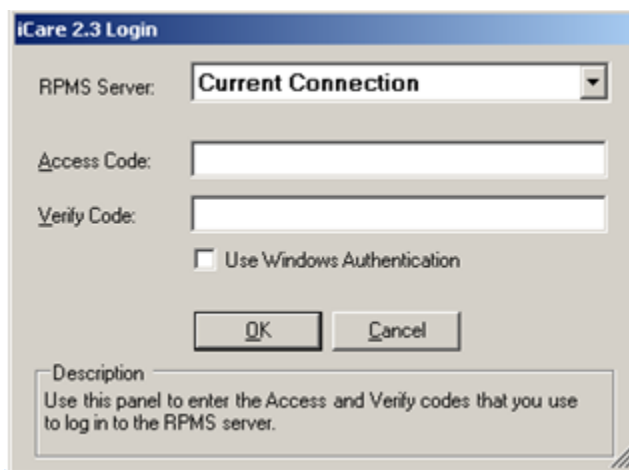


Figure 6-19: Sample iCare 2.3 Login dialog

RPMS Server

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

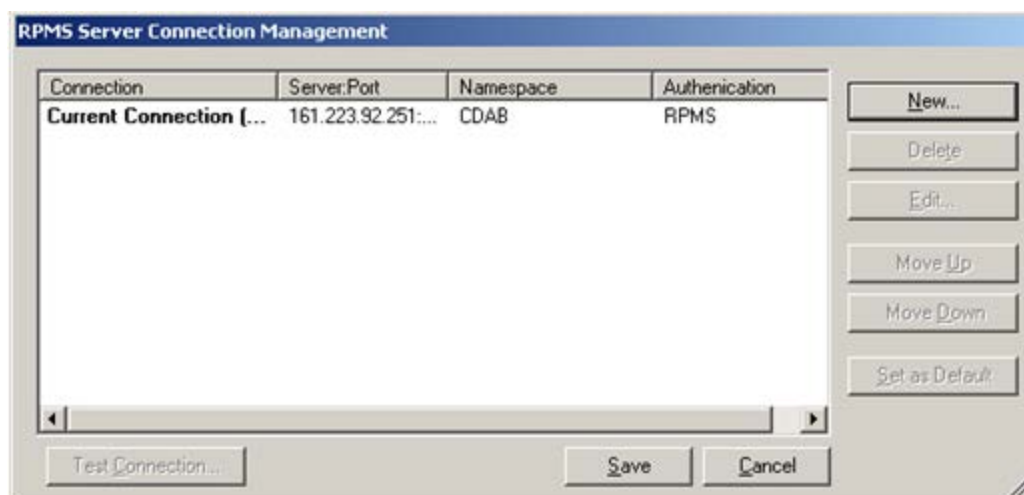


Figure 6-20: Sample RPMS Server Connection Management dialog

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.

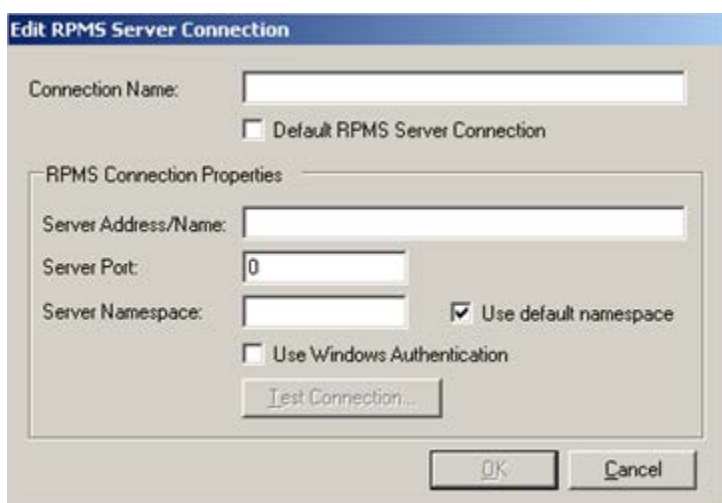


Figure 6-21: Edit RPMS Server Connection dialog

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 displays 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.

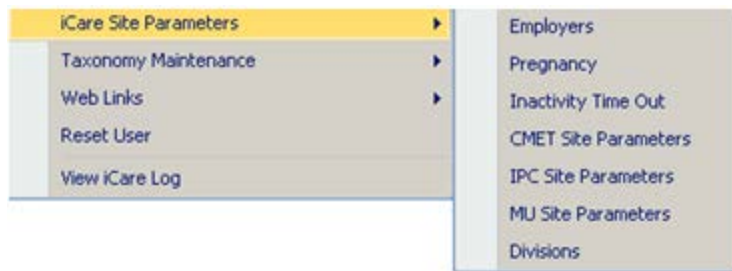


Figure 6-22: iCare Site Parameter options

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.

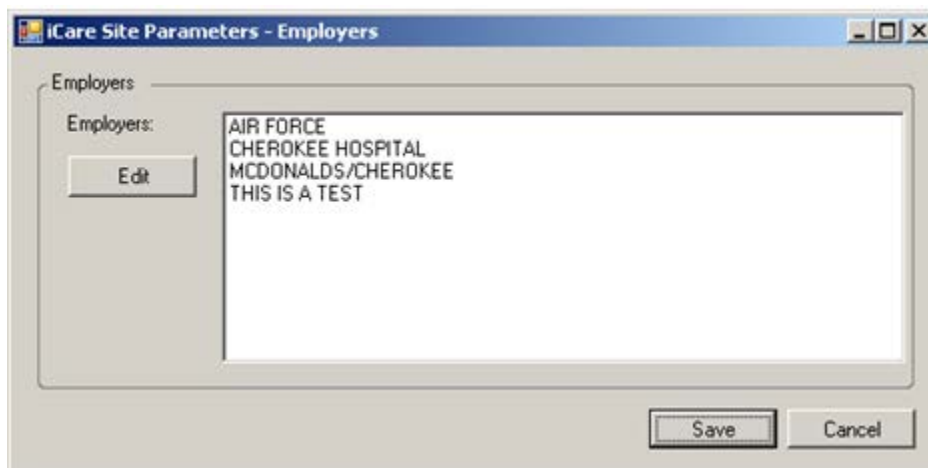


Figure 6-23: Sample iCare Site Parameters – Employers dialog

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.

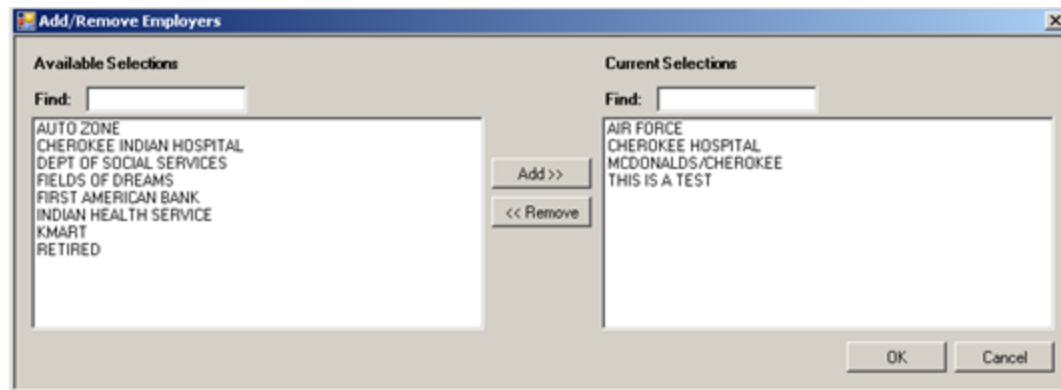


Figure 6-24: Sample Add/Remove Employers dialog

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.

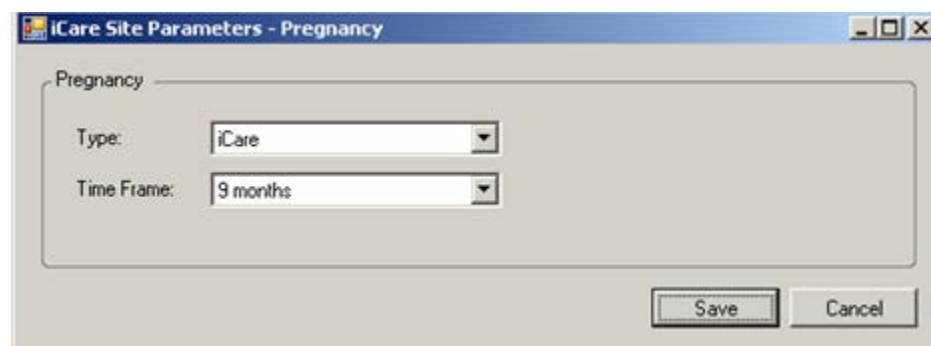


Figure 6-25: Sample iCare Site Parameters – Pregnancy dialog

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” option 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 6-26: 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.

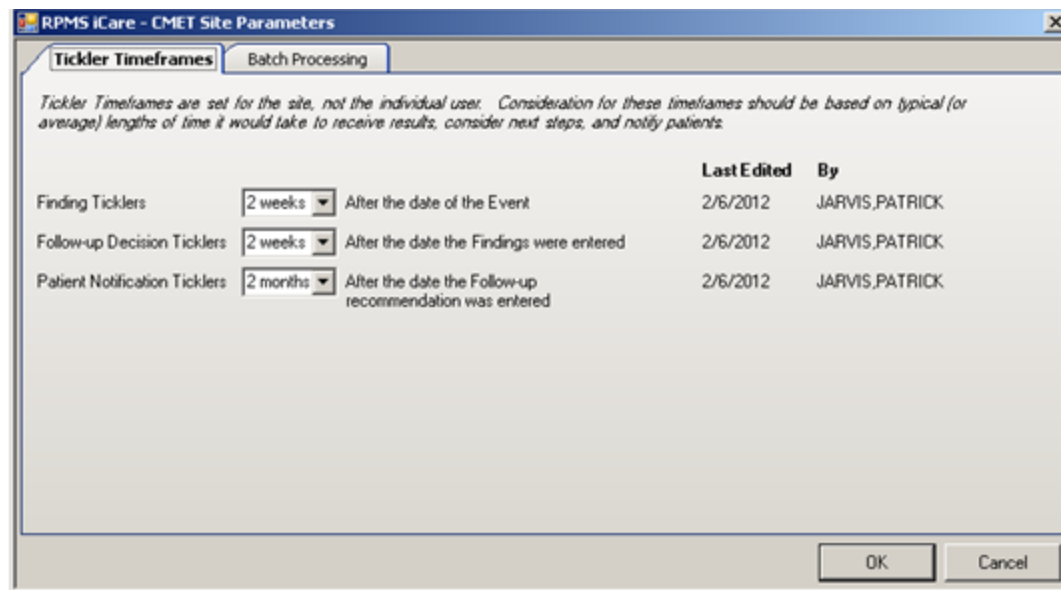


Figure 6-27: Sample RPMS iCare – CMET Site Parameters dialog

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 Tickers. 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.

The screenshot shows a window titled "RPMS iCare - CMET Site Parameters" with two tabs: "Tickler Timeframes" and "Batch Processing". The "Batch Processing" tab is active. Inside the tab, there is a text box with the following text: "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." Below this text is a table with columns: "Event Name", "Timeframe", "Notification Type", "Last Edited", and "By". The table has two rows: "Pap Smear" and "Mammogram Screening". For "Pap Smear", the "Timeframe" is "1 year" and the "Notification Type" is "LETTER". For "Mammogram Screening", the "Timeframe" is "1 year" and the "Notification Type" is "LETTER". Below the table, there is a section titled "Normal Finding for Mammogram Screening" with a dropdown menu showing "BI-RAD CATEGORY 1 - NEGATIVE". At the bottom right of the window are "OK" and "Cancel" buttons.

Event Name	Timeframe	Notification Type	Last Edited	By
Pap Smear	1 year	LETTER		
Mammogram Screening	1 year	LETTER		

Normal Finding for Mammogram Screening

BI-RAD CATEGORY 1 - NEGATIVE

Figure 6-28: 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.

IPC

The IPC measures are aggregated each month and displayed on the Provider Aggregated and Facility Aggregated tabs. Data entered by EHR/PCC/Coding/Billing after the data collection has occurred will not show up on the monthly reports. Sites should factor in the PCC/Coding lag time when setting this parameter. Example: If your site has a 2 day delay in data entry, run the IPC data collection on the 3rd night of the month.

Day of the month to run IPC data collection: 1

This is a list of clinics that are considered as primary care clinics for the Continuity of Care to a Primary Care Provider measure. These clinics will be included in the numerator of the Continuity of Care to a Primary Provider measure. Refer to the IPC Measures Guide for guidance.

Clinics where the patient receives primary care Edit

- FAMILY PRACTICE (28)
- GENERAL (01)
- INTERNAL MEDICINE (13)
- PEDIATRIC (20)

Please select Designated Primary Care Provider(s) who are included in the IPC microsystem

Microsystem Providers Edit

- RAY, KATHY R
- KELSEY, JOANNA
- JARVIS, PATRICK
- ACORD, ARLIS L
- MYLES, SOKENUNESE

Save Cancel

Figure 6-29: 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.

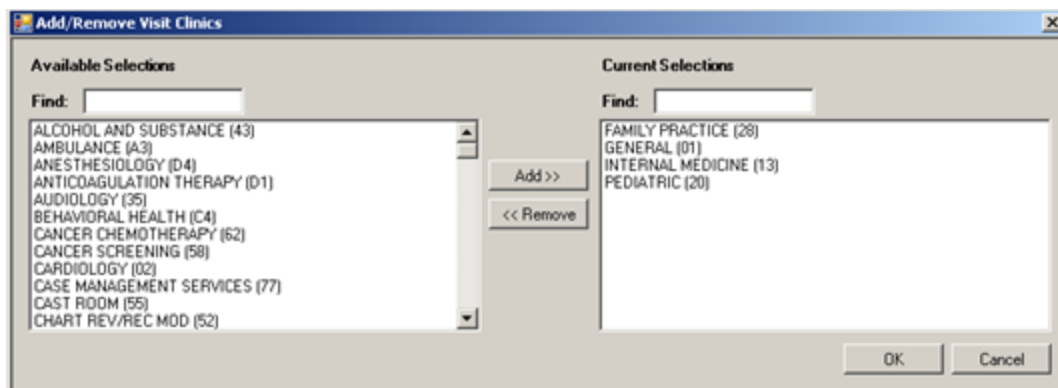


Figure 6-30: Sample Add/Remove Visit Clinics dialog

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.

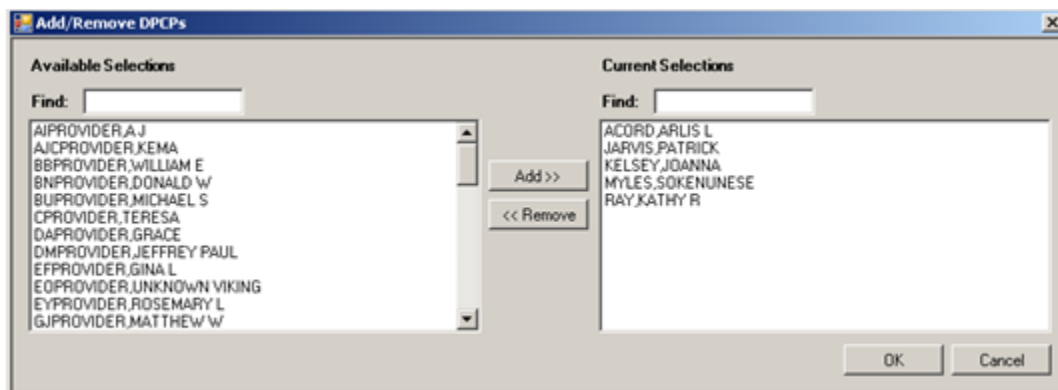


Figure 6-31: Sample Add/Remove DPCPs dialog

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.

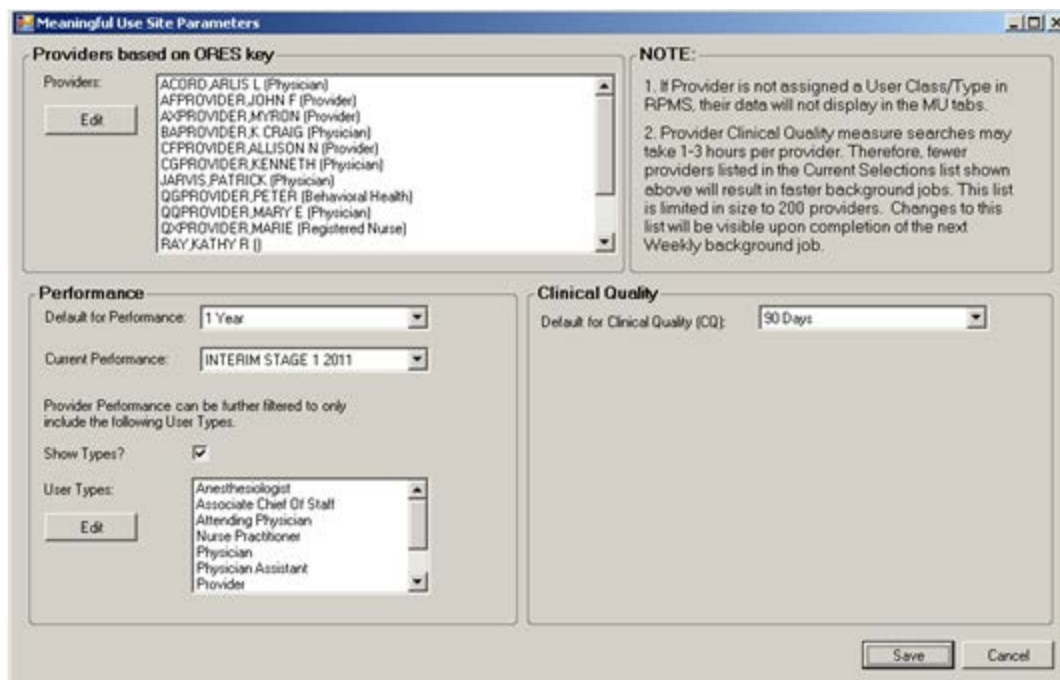


Figure 6-32: Sample Meaningful User Site Parameters dialog

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 PM – By Providers, CQM – Providers, and CQM – Providers sub-tabs. Click Edit to access the Add/Remove Meaningful Use Providers dialog.

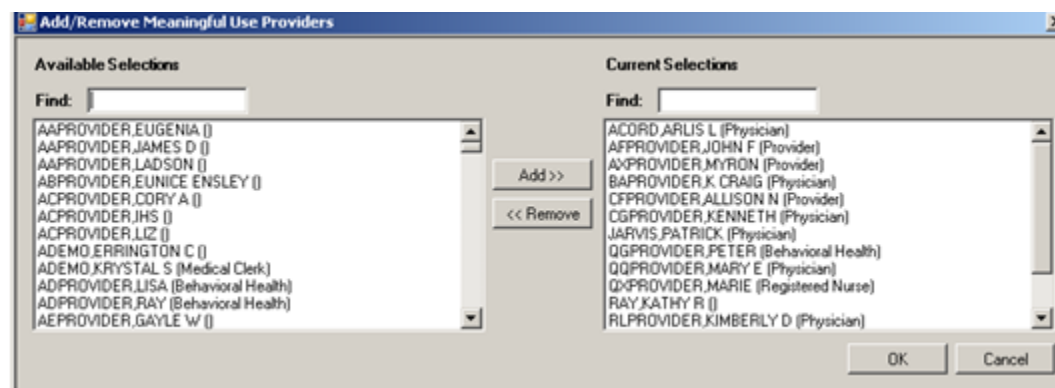


Figure 6-33: Sample Add/Remove Meaningful Use Providers dialog

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 PM – By Providers sub-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.

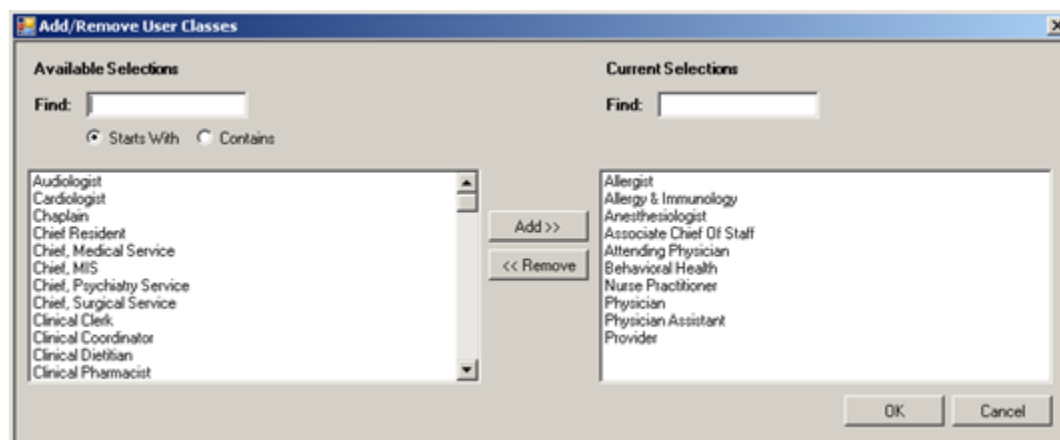


Figure 6-34: Sample Add/Remove User Classes dialog

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.

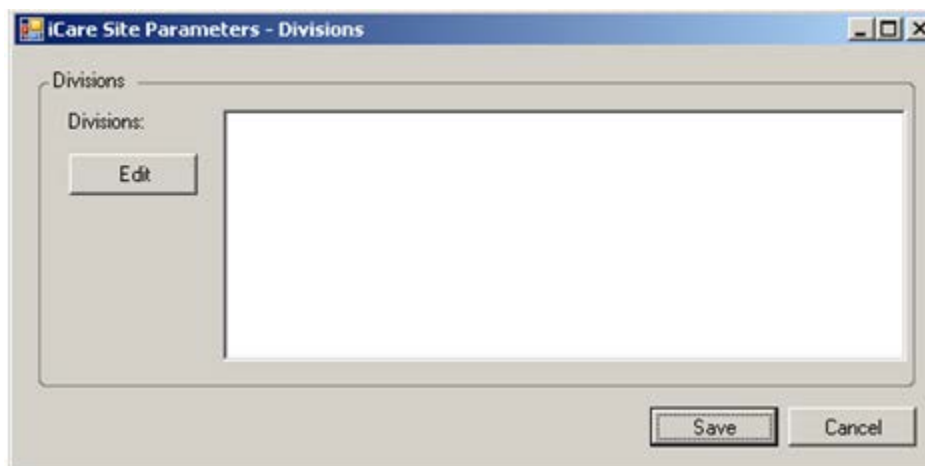


Figure 6-35: Sample iCare Site Parameters – Divisions dialog

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

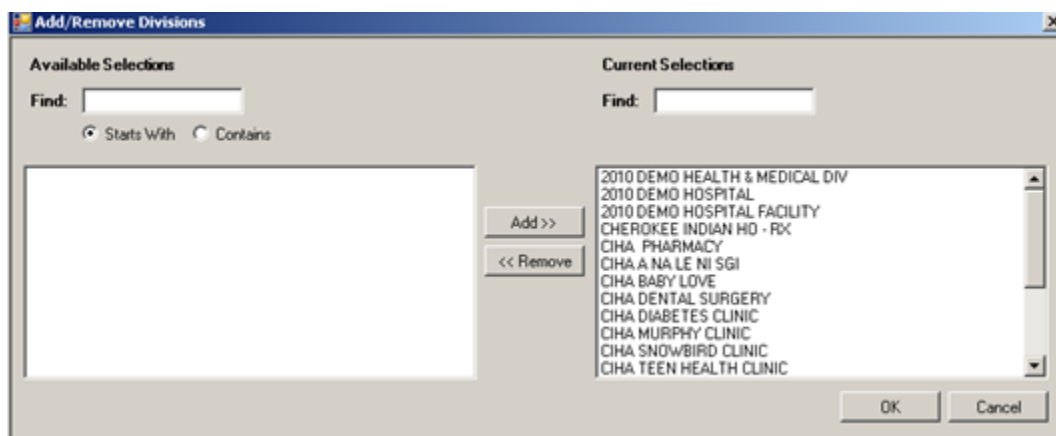


Figure 6-36: Sample Add/Remove Divisions dialog

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.

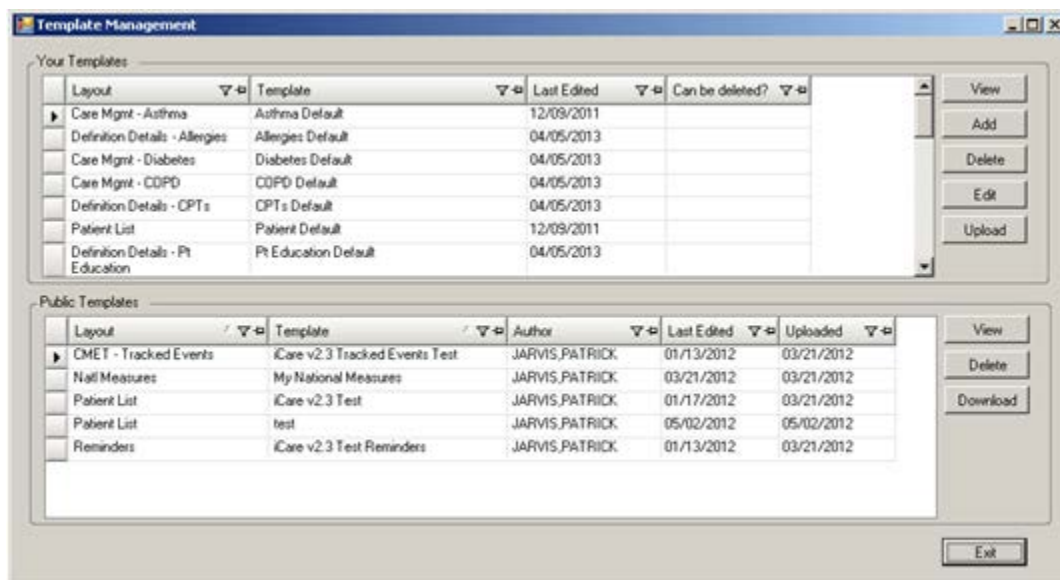


Figure 6-37: Sample Template Management dialog

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 the name of the person who executed the Upload action.

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, the name of the person who executed the Download action 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.

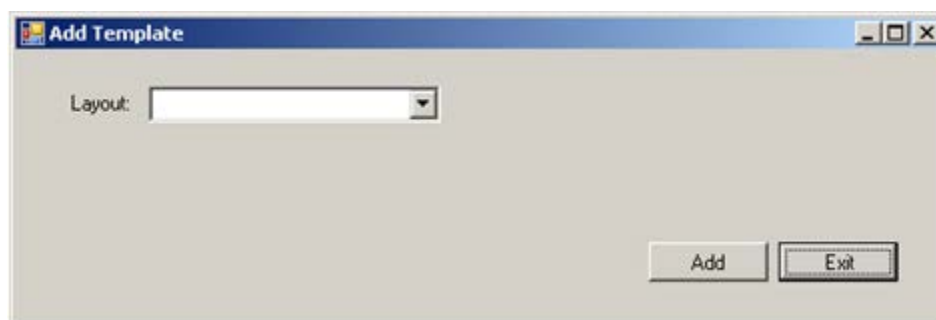


Figure 6-38: Add Template dialog

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.

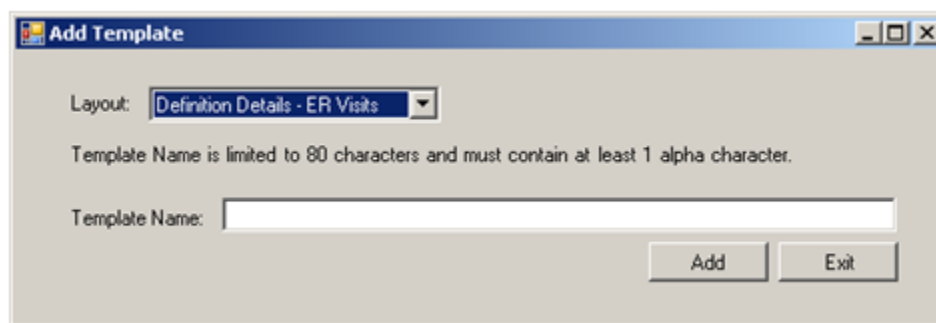


Figure 6-39: Add Template dialog with added field

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.)

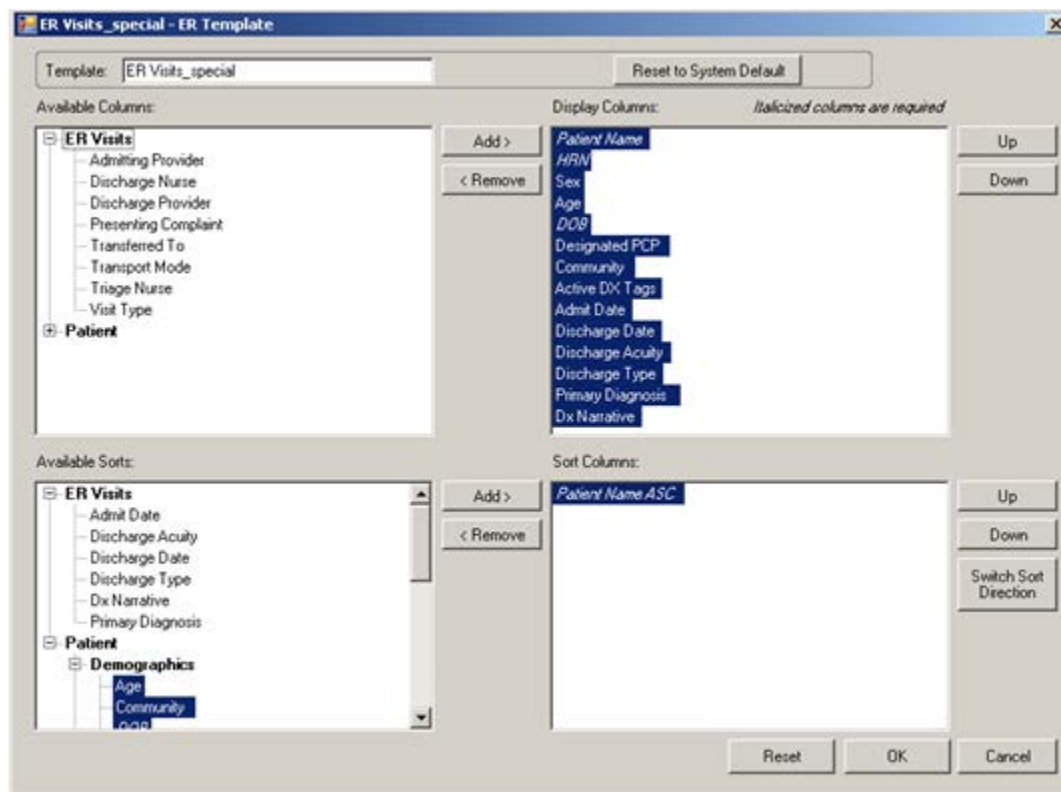


Figure 6-40: Sample template for new template created

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

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

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

6.10.6.1 Display and Available Columns

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



Figure 6-41: Sample Display and Available columns

The listing in the Display Columns area shows the columns that will be displayed for your template. The column names in italics are required and cannot not be removed.

To move a highlighted column name in the Available Columns area to the list in the Display Columns area, click Add. This moves the column name from the left panel to right panel.

Likewise, you can remove a highlighted column name in the Display Columns area and move it to the Available Columns area by clicking Remove. This moves the column name from the right panel to the left panel.

Note: You cannot remove any column names in italics.

You can determine the order the columns display in the Display Columns area by using the Up and Down buttons. Highlight a column name and click the appropriate button. You might have to click the button more than once to move it to the desired location.

6.10.6.2 Columns to Sort

Sorting a column means you want to arrange the items in the column in alpha-numeric order.

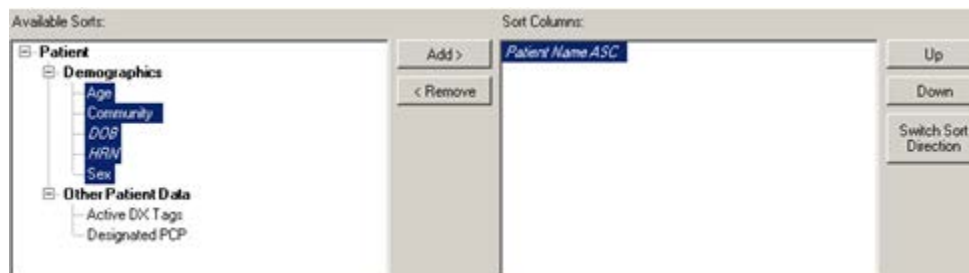


Figure 6-42: Sample Available Sorts and Sort Columns area

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.

6.11 Buttons on Right Side of Window

The buttons on the right side of any iCare window have the same functionality on any window.




Figure 6-43: Buttons on right side of window

These buttons might not be visible; in that case, click the drop-down list  button.


The application provides hover help for each button.

Some iCare windows might not have the mail merge and glossary buttons.


6.11.1 Reset View

Click the Reset View  button (or select Tools | Reset View) to return the current view to the default view. You 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.

6.11.2 Refresh

Click the Refresh  button (or select Tools | Refresh) 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.

6.11.3 Search

You can search for data in the current grid by clicking the Search  button (or by selecting Tools | Search or by using the Ctrl+F key combination) to display the Search dialog.

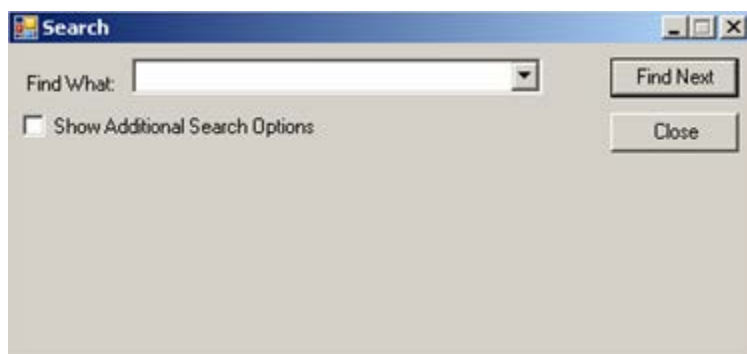


Figure 6-44: Search dialog

If you DO NOT select the “Show Additional Search Options” check box, the search looks in all columns for a match.

If you select the “Show Additional Search Options” check box, the Search dialog changes to show more options for the search.

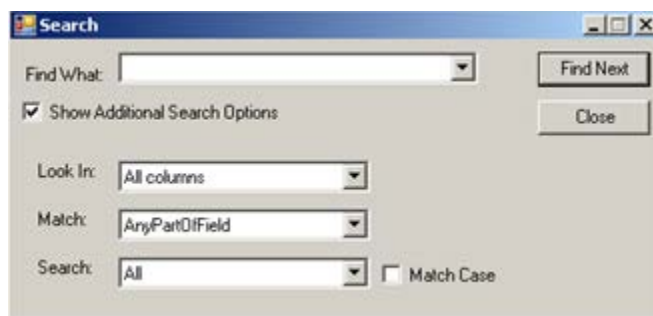


Figure 6-45: Search dialog with additional search options

Type what you want to search for in the “Find What” Free Text field. The remaining fields determine the criteria for the search.

If you check the “Match Case” check box, that will cause the search to match the case of the text in the Find What field.

6.11.3.1 Look In Field

Click the drop-down list for the Look In field to view the options for that field. The highlighted option determines what part of the window to search.

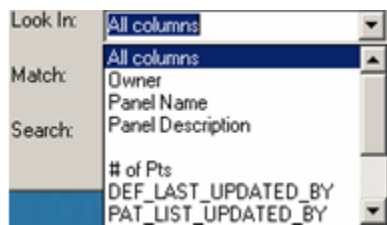


Figure 6-46: Sample drop-down list options for Look In field

What you have highlighted in the upper part of the list determines the options in the lower part of the list. For example, if Look In field contained All columns, then the list of the column names would appear in the lower part of the drop-down list.

6.11.3.2 Match Field

Click the drop-down list for the Match field to view the options for that field. The highlighted option determines what part of the Find What field will be matched in the search.

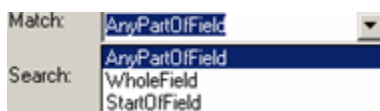


Figure 6-47: Sample drop-down list options for Match field

6.11.3.3 Search Field

Click the drop-down list for the Search field to view the options for that field. The highlighted option determines the direction of the search.



Figure 6-48: Sample drop-down list options for Search field

After all fields are populated with the search criteria, click the Find Next button. (Otherwise, click Cancel.)

If a match is found, the matching text will be highlighted (in the grid). If you want to continue the same search, click the Find Next button again; repeat this process as needed.


If a match is not found, the Datagrid Search Results message displays.



Figure 6-49: Sample Datagrid Search Results

Click OK to close the message and to return to the Search dialog.

6.11.4 Export to Excel

You can export the information in a grid to Excel by clicking the Export to Excel  button (or by selecting Tools | Export to Excel or by using the Ctrl+E key combination).

The application displays the warning message about the export.

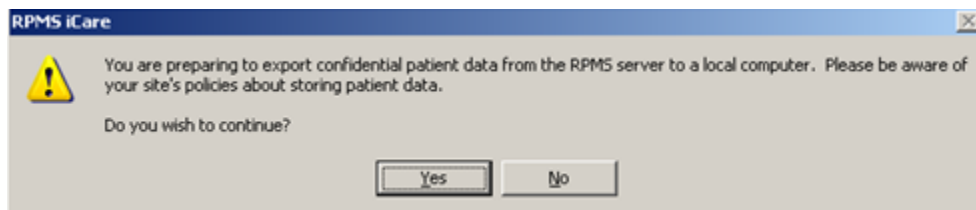


Figure 6-50: Warning message about exporting the patient data

Click No to dismiss the warning and to exit the export process.

Click Yes to continue the export process and to display the Save As dialog.

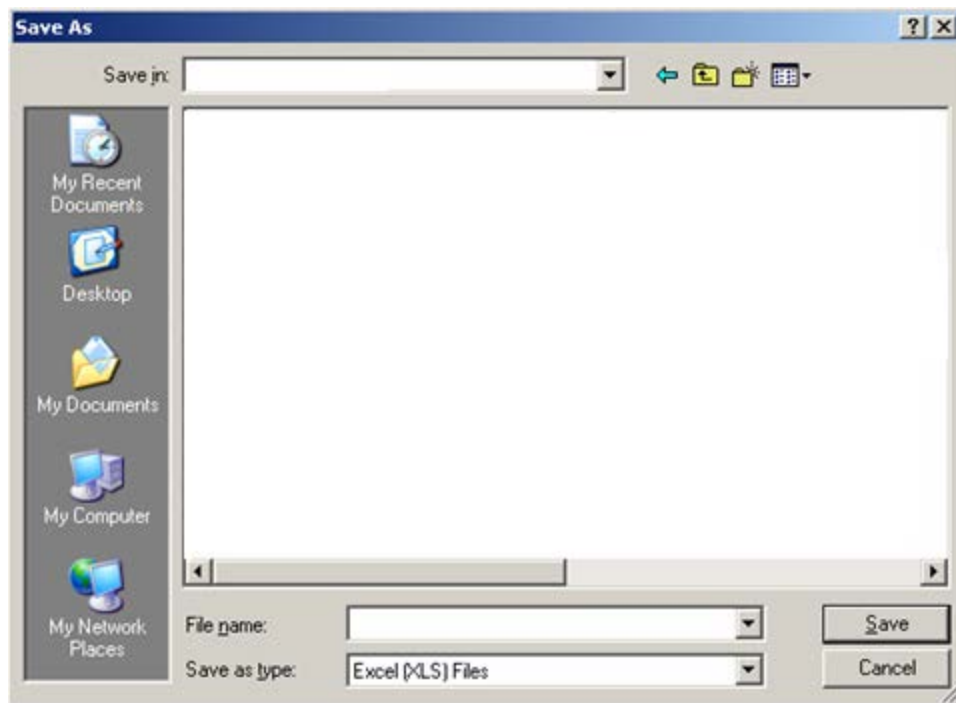


Figure 6-51: Sample Save As dialog

Make sure the location where you want to save the file displays in the Save in field.

Type the name in the “File name” field. The system will add XLS extension to the field name (automatically).


Click Save. (Otherwise, click Cancel.) If you use Save, the Export Panel message “Excel export has been created.” displays when the Save command is complete; click OK to dismiss the message.

When you view the Excel document, the application provides a Confidential Patient Information header in the document.

6.11.5 Mail Merge

The iCare application provides the capability to export patient demographic data in a format that can be used by word processing mail merge files. This is a Demographic Data Export for Letter Generation function.

Follow these steps:

1. Select the patients that you want to include in the mail merge process.
2. Click the Mail Merge  button (or select Tools | Mail Merge) to display the Mail Merge Export dialog.

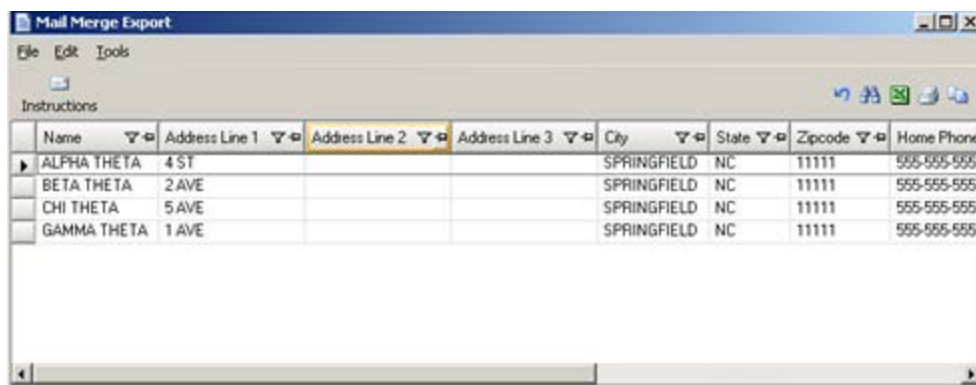



Figure 6-52: Sample Mail Merge Export Dialog

Section 6.11 provides information about how to use the buttons on the right side of the toolbar.

3. Click the Mail Merge Instructions  button to display the Mail Merge Instructions pop-up. Here will be the instructions for completing the mail merge process.

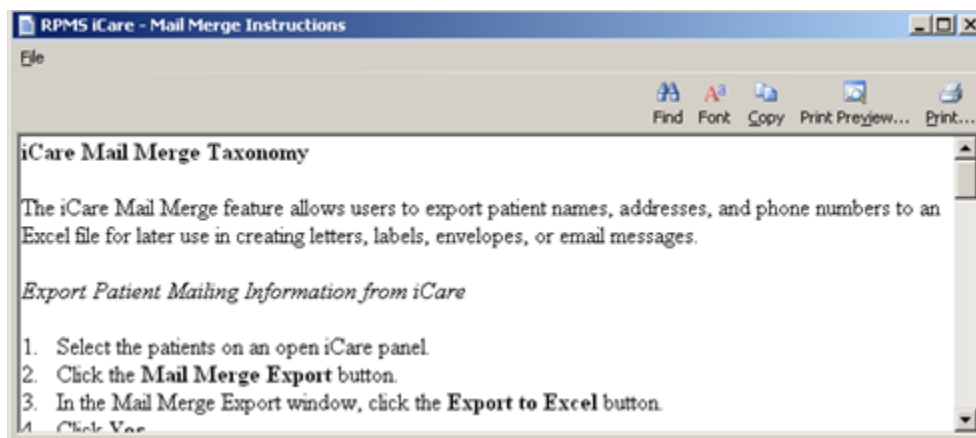



Figure 6-53: Mail Merge Instructions dialog

Note that you can print the contents by clicking the Print button or by selecting File | Print.

Section 6.7 provides information about using the controls on the pop-up.

6.11.6 Glossary

Click the Glossary  button (or select the particular glossary from the Help) to display the particular Glossary pop-up. The name of the glossary pop-up varies according to the part of iCare that you are using. For example, if you are on the Reminders tab, the Reminders Glossary pop-up would display.

Glossary

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.

Meaningful Use

Electronic health records can provide many benefits for providers and their patients, but the benefits depend upon how they are used. Meaningful use is the set of standards defined by the Center for Medicare and Medicaid Services Initiative Programs that govern the use of electronic health records and allows providers and hospitals to earn incentive payment by meeting specific criteria. The goal of meaningful use is to promote the spread of electronic health records to improve healthcare in the United States. More information can be found at:

www.ihs.gov/meaningfuluse/

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/Hover Help

A common GUI element used to provide additional information to users. To display a Tooltip, hover the mouse pointer, without clicking, over a column heading or field.

Acronym List

BQI	Namespace for iCare
CAHs	Critical Access Hospitals
GUI	Graphical User Interface
HHS	Health and Human Services
IHS	Indian Health Service
MU	Meaningful Use
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