RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

Addendum to User Manual
Panel View User Manual

Version 2.3, Patch 4
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Office of Information Technology
Division of Information Technology
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Preface

The purpose of this manual is to provide you with the information you need to use the latest enhancements to the Panel List window in the iCare (BQI) population management application.

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

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

- iCare – IHS OIT
  Available at http://www.ihs.gov/cio/ca/icare/
- iCare Population Management GUI, User Manual Version 2.2 (July 2011). Available at http://www.ihs.gov/RPMS/PackageDocs/bqi/bqi_022u.pdf
- HHS WebEx recorded training sessions (search for iCare). Available at https://ihs-hhs.webex.com/mw0306lb/mywebex/default.do?siteurl=ihs-hhs&service=7

  or 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.

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

1.1 Background

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

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

1.2 iCare Graphical User Interface

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

iCare can help IHS providers by:

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

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

1.3 Who Should Use iCare?

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

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

1.4 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 use iCare successfully, 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 Panel View Window

The Panel View window displays data about the patients in a selected panel. You access this window by using the Open function or by double-clicking a record on the Panel List window.

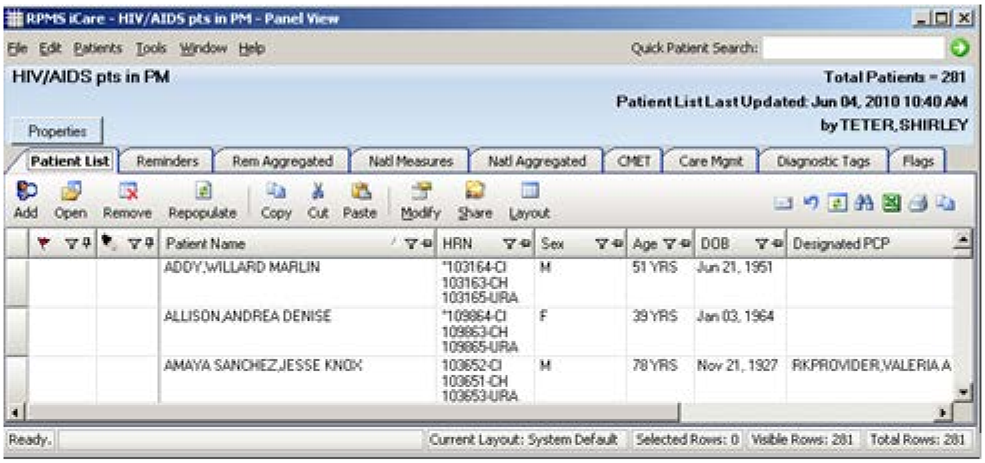


Figure 2-1: Sample Panel View window

NOTE: the Repopulate button will not display on the Panel View window if the patients in the panel were added manually (that is, the panel has no predefined logic).

The application displays the loading progress (in percentage) in the status bar when the panel contains a large number of patients. This feature applies to the Patient List (when you first access the Panel View window), Reminders, Natl Measures, CMET, Care Management, and Diagnostic Tags tabs.

Figure 2-2: Loading Progress Information

You can cancel the load by clicking Cancel; the application displays the “Cancel display of data?” dialog confirming that you want to cancel the loading process. Click Yes to cancel the load (otherwise, click No).

iCare allows for more than one user to open the same shared panel simultaneously. The second and subsequent users to open the same panel will have “read only” access to the panel content, similar to Word or Excel functionality. If the first user closes the panel, the second user will be notified that the panel is now available for “edit” access, unless the user only has Shared Read Only access by the panel creator.

2.1 Information on Toolbar

The following data displays in the panel information area located between the menu bar and the Panel View tabs:

- Panel Name and Panel Description: both data items are user-defined.
- Owner Name (only displayed if you are not the creator of the panel): Name of the user who created the panel and shared it with you.
- Total Patients: Number of patients in the panel.
- Patient List Last Updated: Date and time the Patient List was last repopulated, either manually or auto-repopulated.
- By: Name of user who last repopulated the Patient List.

> **Note**: If the panel has been shared with others who have read/write access, the displayed Owner and By fields might contain different names.

2.2 Properties

Click the Properties button located above the tabs in the Panel Information area (or select File | Panel Properties) to view the properties about the current panel. Click OK to dismiss the pop-up.

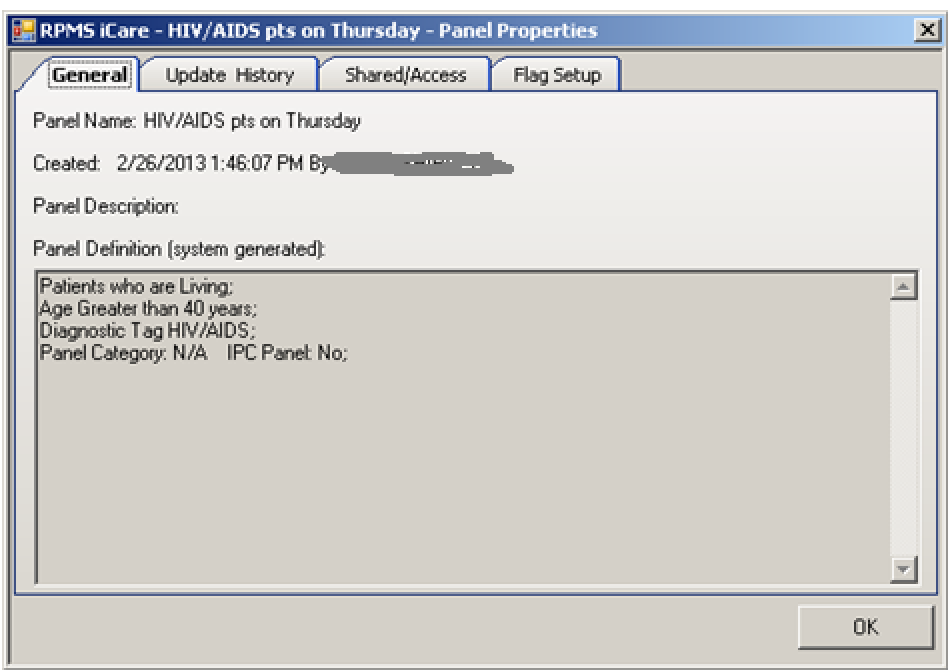


Figure 2-3: Sample Panel Properties pop-up

- The General tab provides information about the panel name, when the panel was created and who created it, the panel description, and any filters used to create the panel.
- The Update History tab provides information about the auto repopulate status of the panel, when the panel definition was last modified and who modified it, when the patient list was last populated and who modified it, and when the patient list was manually updated.
- The Shared/Access tab provides information about the shared users for the current panel and their access rights.
- The Flag Setup tab provides information about the timeframes for the flag types (defined in User Preferences).

Click OK to dismiss the pop-up.

3.0 Patient List Tab

The Patient List tab of the Panel View window displays data about the patients in the panel. The default grid will displays the standard demographic columns (Name, HRN, Sex, Age, DOB) in addition to the Diagnostic Tag-related data and the condition-specific (register) fields.

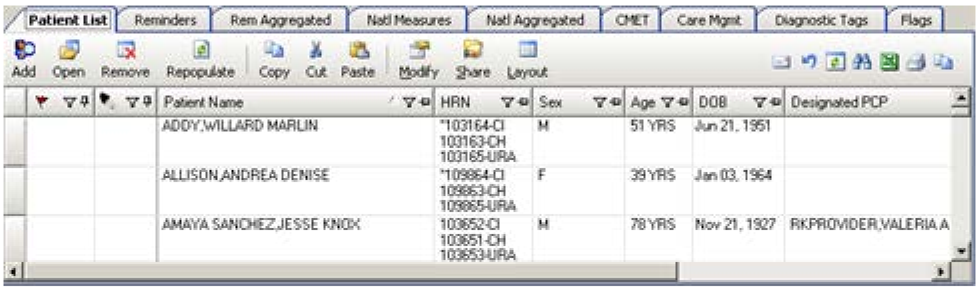


Figure 3-1: Sample Patient List tab

3.1 Patient List Tab Layout

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The status bar shows information about the rows in the panel. Visible rows will be a smaller number than Total Rows if a filter has been applied.

Figure 3-2: Sample row information

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

The following table provides information about the default columns on the Patient List tab.

Column	Information
Flag indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags "off" in the User Preferences (see section **Error! Reference source not found.** Flag Setup Tab).
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click the name.
HRN	Patient's health record number. The HRN will display as the HRN number followed by the facility code.
Sex	F (for female) or M (for male).
Age	Patient's age.
DOB	Patient's Date of Birth.

Column	Information
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient’s community of residence.
Active DX Tags	One or more predefined diagnosis definitions (“tags”) that iCare has proposed for the patient that has a Proposed or Active status. Section3.1.1 provides more information about Diagnostic Tags.

You can view the Community alert text by hovering your mouse over the Community Alert icon, if any. The icon does not affect the sorting of the Community column.

3.1.1 Diagnostic Tags

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

- Asthma
- COPD
- Cardiovascular Disease (CVD) Known (CVD Kn)
- CVC At Highest Risk (CVD AHR)
- CVC At Significant Risk (CVD ASR)
- CVD At Risk (CVD AR)
- Diabetes (DM)
- HIV/AIDS (HIV)
- Hypertension (HTN)
- Obese
- Prediabetes/Metabolic Syndrome w/o DM (PreDM)
- Current Smokers (Smoker)

iCare will classify tags into one of five statuses: proposed (pending) (P), accepted (A), not accepted (NA), No longer valid (NLV), and Superseded (S). In the Active DX Tags column on any Panel View, the status value should be concatenated with the tag name, e.g., Asthma (A); CVD AHR (P); DM (A).

The detailed logic for each of these diagnosis tags can be found in the Diagnostic Tag glossary (found by selecting that option on the Tools menu).

3.1.2 Patient Classified as Sensitive

You can identify a “sensitive patient” in the Patient Name column when the name is preceded by the symbol.

When you double-click the sensitive patient record, and if one of the following conditions exists:

- if the patient is Sensitive and the user is not a DG SENSITIVITY key holder

  OR

- if the patient is an employee and the user is not a DG SENSITIVITY OFFICER key holder

Then, the application will display a warning message.

Figure 3-3: Sample Sensitive Patient warning message

Click Yes to open the patient record. Otherwise, click No.

3.2 Patient List Tab Toolbar

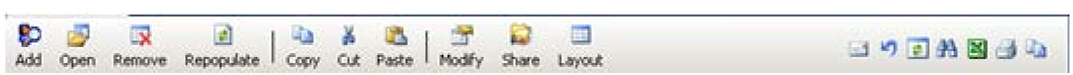


Figure 3-4: Patient List tab toolbar

3.2.1 Add

Note:	You can add a patient to the current panel by using the Add function or by copying a patient from another panel and pasting the patient data into the current panel.

Only the panel creator or the shared user with Read/Write access can add patient names to the current panel. This is a manual add function. You can add a patient name even if the panel was originally created from a pre-defined search definition. The panel stores the original definition as well as any patients added. This is important during the repopulate action.

Add patient to the Panel View by doing one of the following:

- Clicking the Add  button
- Selecting Patients | Add Patient(s)
- Selecting the Add Patient(s) option on the context menu

The Select Patients dialog displays.

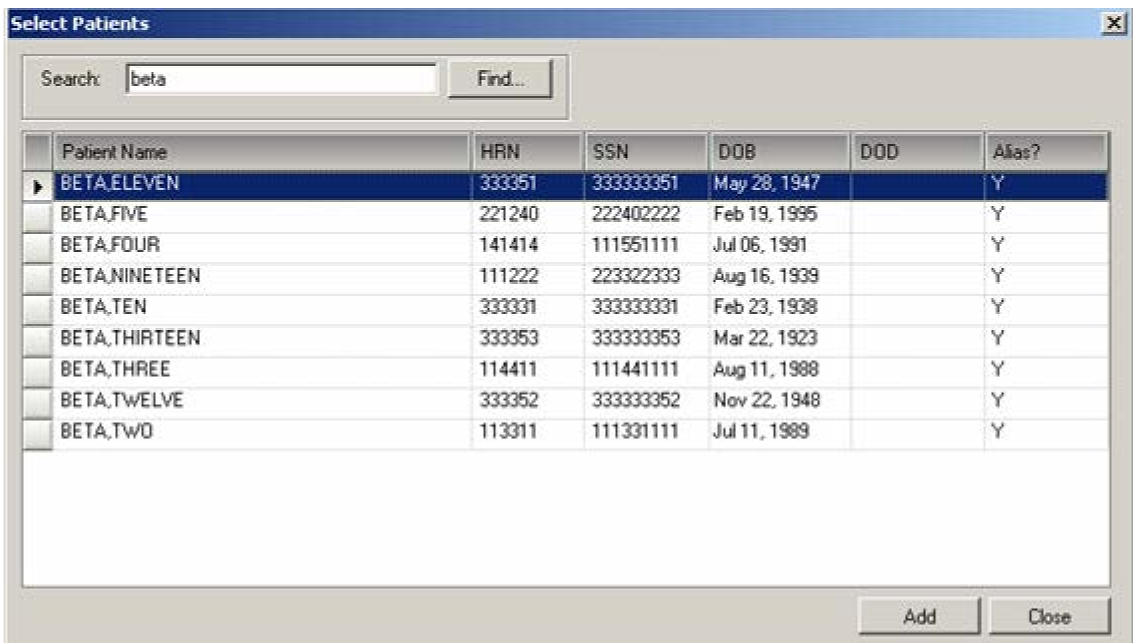


Figure 3-5: Select Patients dialog

Use any of the following to search for the patient in the Search field:

- a few characters of the patient's last name
- the patient's HRN
- the patient's SSN
- the patient's Date of Birth

Then click Find. The retrieved records will display in the lower panel of the Select Patients dialog. You can refine your search (if needed) by using the Search field again.

More than one row at time can be added by selecting multiple rows using Ctrl and Shift keys while highlighting the row.

When you have highlighted the correct patient(s), click Add to add the patient(s) to the Patient List tab on the Panel View window. (Otherwise, click Close.)

3.2.2 Open

The Open function moves the focus to another window where you can view the patient record (patient data information stored in the RPMS database).

Highlight the patient name and open the patient record by doing one of the following:

- Clicking the Open 

 button
- Selecting Patients | Open Patient(s)
- Selecting the Open Patient(s) option on the context menu
- Double-clicking the row in the grid
- Using the key combination Ctrl+O

This action opens your default tab of the Patient Record window.

By highlighting more than one row, multiple patient records open in individual windows.

3.2.3 Remove

The Remove function deletes one or more selected patients from the Patient List tab on the Panel View window. The removed patients are NOT deleted from the RPMS database but are only removed from your panel display. The Remove function is limited to the panel creator or the shared user with Read/Write access.

The panel stores the original definition as well as any patients removed or added. This is important during the repopulate action.

Remove the highlighted patients by doing one of the following:

- Clicking the Remove 

 button
- Selecting Patients | Remove Patient(s)
- Selecting the Remove Patient(s) option on the context menu
- Pressing the Delete key on your keyboard

After using the Delete function, the “Confirm patient remove” dialog displays, asking if you want to delete the selected patients. Click Yes to remove them. (Otherwise, click No.)

3.2.4 Repopulate

The Repopulate function rebuilds the contents of the panel. This function reruns the panel definition against the cached data (from the nightly job) and adds patients who meet the criteria and removes the patients that no longer meet the criteria. The Repopulate function is limited to the panel creator or the shared user with Read/Write access.

NOTE: the Repopulate button will not display on the Panel View if the patients in the panel were added manually (that is, the panel has no predefined logic).

Repopulate a panel by doing one of the following:

- Clicking the Repopulate 

button
- Selecting Patients | Repopulate
- Selecting the Repopulate option on the context menu

A warning message displays that asks if you want to update the patient list by stating: The patient list for this panel may be updated during repopulation and cannot be undone. Do you want to continue? Click Yes to repopulate the panel. (Otherwise, click No.)

If you manually edited (added or removed) patients in the panel, the Maintain Manual Changes warning message displays that asks: This panel has been edited manually (patients added or removed). Do you want to keep your manual change while repopulating?

Click Cancel to cancel the repopulate process.

Click Yes to repopulate the panel and to keep the manually added or removed patients.

Click No if you want the patient list totally refreshed. In this case, the patient list will be totally refreshed and any added patient names will be lost as well as any deleted patient names will be added back to the panel.

If you use Yes or No and the current panel contains many patients, iCare displays the “Background populate” information message that states: Populating the panel may take some time. Do you want to run in the background? Click Yes to run the repopulate process in the background. Otherwise, click No to repopulate in the foreground.

3.2.5 Copy

The Copy function copies the selected patient's information to the iCare clipboard. Then you can go to another panel view (for a different patient panel) and paste the patient's information.

Copy the selected patient's information by doing one of the following:

- Clicking the Copy  button
- Selecting Patients | Copy Patient(s)
- Selecting the Copy Patient(s) option on the context menu
- Using the keyboard combination Ctrl+C

Use the Select All function to select all the patients on the current Panel View window. Once the patients are selected, you could copy-paste them into another panel, for example.

Select all the patients by doing one of the following:

- Selecting Edit | Select All
- Using the keyboard combination Ctrl+A

If you need to deselect the patients, select the Deselect All option on the Edit menu.

3.2.6 Cut

The Cut function copies the selected patient's information to the iCare clipboard and removes the selected patient from the current Panel View. Then you can go to another panel view (for a different patient panel) and paste the patient's information. The Cut function is limited to the panel creator or the shared user with Read/Write access. This function is useful for moving patients from one panel to another.

Cut the selected patient's information by doing one of the following:

- Clicking the Cut  button
- Selecting Patients | Cut Patient(s)
- Selecting the Cut Patient(s) option on the context menu
- Using the keyboard combination Ctrl+X

You need to move to another patient panel and use the Paste function.

3.2.7 Paste

The Paste function places the contents of the iCare clipboard (containing patient data) into the current Panel View (this cannot be duplicate patient data). If there are duplicate patients in the paste operation, the system displays a message about this condition. The Paste function is limited the panel creator or the shared user with Read/Write access.

Patients that are pasted into a panel are considered “manually added.” This means that they are considered to be members of the panel that were manually selected to be on the patient list, and therefore are considered outside of the patient list that exists due to the panel’s search logic.

Paste the contents of the iCare clipboard by doing one of the following:

- Clicking the Paste  button
- Selecting Patients | Paste Patient(s)
- Selecting the Paste Patient(s) option on the context menu
- Using the keyboard combination Ctrl+V

The patients on the clipboard are added to the current Panel View. (If there are no patients on the iCare clipboard, a warning message will display.)

If there is a duplicate patient to be pasted, the Duplicate patient message displays that states: The patient that is being pasted already exists in the panel. To avoid duplicate patients, this patient will not be pasted. Click Close to dismiss the message.

3.2.8 Modify

The Modify function modifies the patient panel definition information. This function is limited to the panel creator or the shared user with Read/Write access.

Modify the current panel by doing one of the following:

- Clicking the Modify  button
- Selecting File | Modify

The Panel Definition window for the panel displays.

3.2.9 Share

The Share function defines users who can share the current panel. This function is limited to the panel creator or the shared user with Read/Write access.

You can share the patient panel by doing one of the following:

- Clicking the Share 

 button
- Selecting File | Share

The Panel Definition window opens to the Sharing tab of the Panel Definition window.

3.2.10 Layout

The Layout function defines which data columns to show in the current panel, the order of the columns chosen for display, and the initial sort order of the patients in the list. This layout information is stored with the panel if the you decide to save the panel changes. Users with read-only access can change the layout of a panel.

Select the view layout function by doing one of the following:

- Clicking the Layout 

 button
- Selecting File | Layout

The Patient List Layout window opens, showing the current layout for the panel.

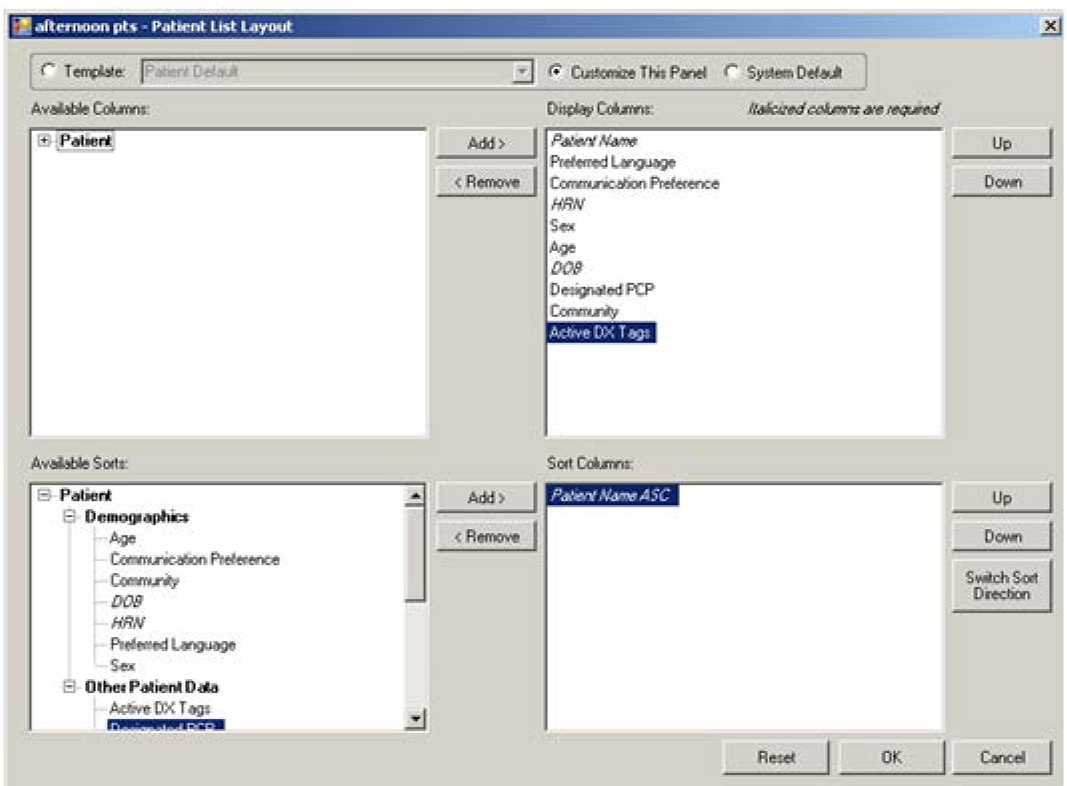


Figure 3-6: Patient List layout window

Section 12.5 provides information about using the various features on the layout window.

3.3 Patient List Tab Menu Options

The options on the Patients menu operate like the action buttons on the toolbar. See section **Error! Reference source not found.** Patient List Tab Toolbar for more information.

3.3.1 File Menu

The options on the File menu of the Patient List tab are:

New: This option displays the Panel Definition window where you can define a new patient panel.

Modify, **Share**, **Layout:** These options work like the buttons on the toolbar. Section 3.2 provides for information about the buttons.

Save: This option saves the changes you made to the current Panel View window.

Page Setup: This option sets the Margin, Paper, and Layout characteristics (like landscape or portrait orientation) for printing.

Print: This option outputs the data in selected rows in the grid. The application displays the Print dialog where you select the Page Range, Number of Copies, the printer, etc. The application provides a header stating “Confidential Patient Information” for all printed panel views.

> If you do not select any rows (when using the Print or Print Preview option), 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.

Print Preview: This option displays the Print Preview dialog for the selected rows in the grid. Section 12.4 provides information about using this dialog.

Panel Properties: This option displays the Panel Properties window. This view-only window provides information about the panel properties. Section 2.2 provides information the Panel Properties window.

Background Jobs: This option displays the Background Jobs pop-up. Section 12.8 provides information about the pop-up.

Close: This option closes the current Panel View window. If there are changes that need to be saved, you will be notified about this condition.

3.3.2 Tools Menu

The options on the Tools menu are:

Quick Patient Search: This option opens the Quick Patient Search (within Panel) dialog.

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

User Preferences: This option opens the User Preferences window.

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

4.0 Reminders Tab

The Reminders tab displays the national reminders that are pulled from the same data as the Health Summary report reminders in RPMS (such as lab test, immunization, etc.).

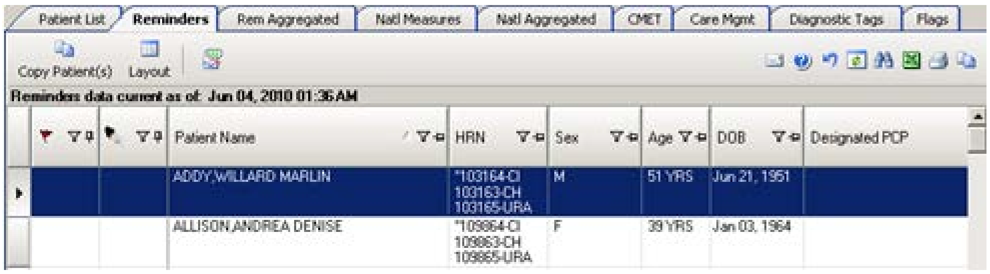


Figure 4-1: Sample Reminders tab

The Reminders Glossary contains information about each of the Reminders. To view this glossary, select Help | Reminders Glossary.

4.1 Reminders Tab Layout

The default view displays the fields in the following order:

Column	Information
Flag indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags “off” in the User Preferences.
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click it.
HRN	Patient’s health record number. The HRN will display as the HRN number followed by the facility code.
Sex	F (for female) or M (for male).
Age	Patient’s age.
DOB	Patient’s Date of Birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient’s community of residence.
Active DX Tags	One or more predefined diagnosis definitions (“tags”) that iCare has proposed for the patient that has a Proposed or Active status.
Individual Columns	There are individual columns for each Reminder.

You can view the Community alert text by hovering your mouse over the Community Alert icon, if any. The icon does not affect the sorting of the Community column.

Double-click any row in the grid to access the Reminders tab of the Patient Record window.

The default sort order is alphabetical by Patient Name.

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

4.1.1 Due/Overdue Dates

A date will be displayed under each of the particular reminder's column if the test or procedure is currently due. An icon will display if the test or procedure is overdue, as shown below.

Figure 4-2: Sample Overdue Date for Pelvic Exam Reminder

4.1.2 Tooltip for Test/Procedure

Hover your mouse over a test/procedure column heading to view information about it. The information is pulled from the Reminders application.

4.2 Reminders Tab Toolbar

The reminder logic is calculated with Flags/Tags/Performance data runs and cached for display. The reminder logic is updated nightly by a system job. The toolbar shows the date for which the data is effective.

Section 12.2 provides information about the buttons on right side of window of the toolbar.

4.2.1 Copy Patient(s)

This action copies the patients information to the iCare clipboard.

Select one or more patients and then do one of the following:

- Click the Copy Patient(s)  button
- Select Reminders | Copy Patient(s)
- Use the keyboard combination Ctrl+C

You must go to another panel view (for a different patient panel) and paste the patient's information.

4.2.2 Layout

The Layout function determines which reminder columns to display for the current panel as well as the order and sorting that should be used.

To change the layout, do one of the following:

- Click the Layout 

 button
- Select Reminders | Layout

The Reminders Layout screen will display for the current panel. Here you can select the Reminders columns you want to display on your panel.

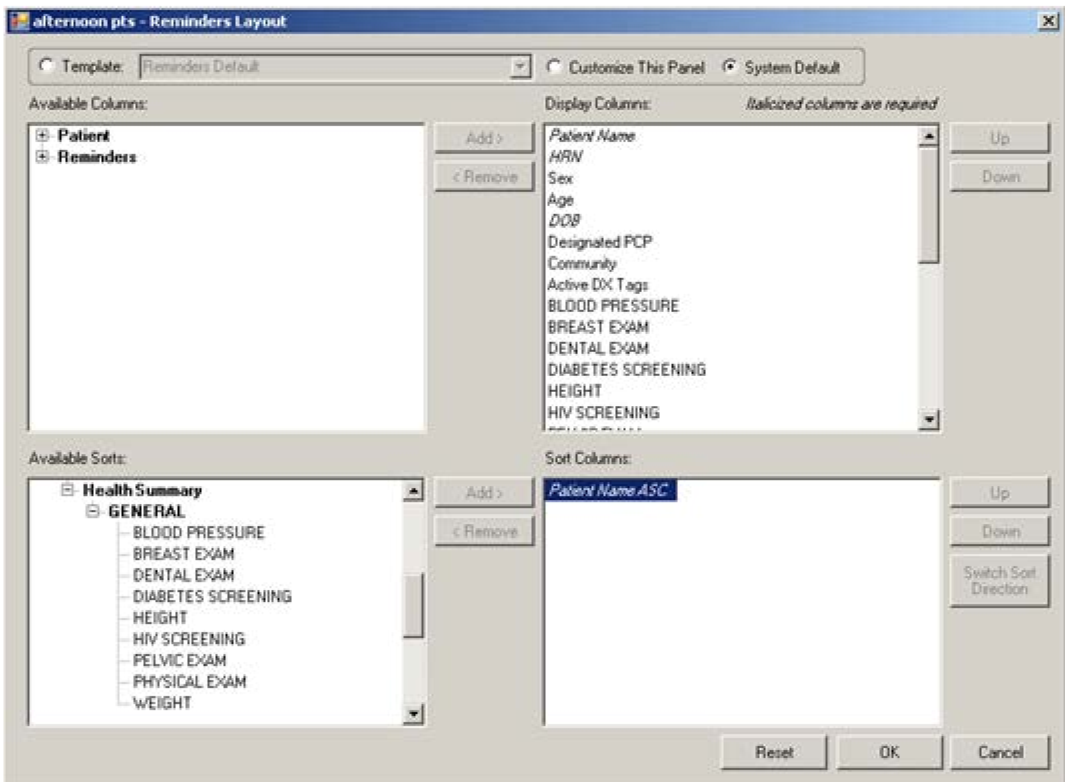


Figure 4-3: Reminders Layout window

You can display the EHR Clinical Reminders by selecting Reminders | EHR Clinical Reminders (on the Reminders Layout window) and add them to the Display Columns. Section12.5 provides**Error! Reference source not found.** information about manipulating the columns the layout.

4.2.3 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the background jobs button
- Select File | Background Jobs

The action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information this window.

4.3 Reminders Tab Menu Options

4.3.1 File Menu

The options on the File menu for the Care Management Tab are the same as those on File menu for the Patient List tab.

4.3.2 Tools Menu

The options on the Tools menu for the Reminders tab are:

Quick Patient Search: This option opens the Quick Patient Search (within Panel) dialog.

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

User Preferences: This option opens the User Preferences window.

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

5.0 REM Aggregated Tab

The Reminders Aggregated tab displays the percentages and counts of patients within a panel that have or have not met reminder criteria. Active reminders are reminders that are “turned on” at a site. Reminders will be calculated at the time the view is opened.

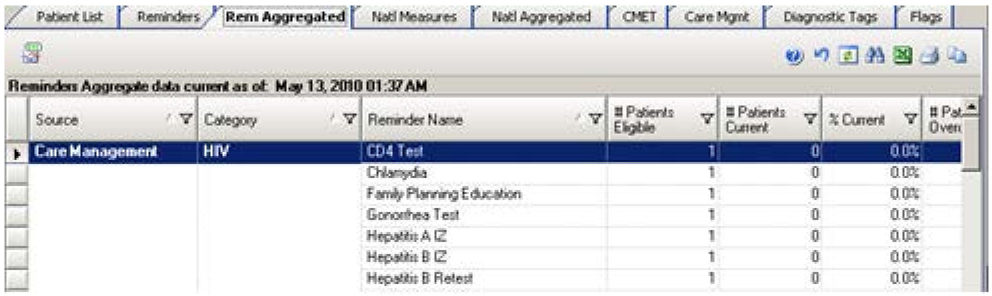


Figure 5-1: Sample Rem Aggregated tab

5.1 Rem Aggregated Tab Layout

The default view displays the fields on the Reminders Aggregated tab in the following order:

Column	Meaning
Source	The name of the source for the reminder, The following reminders will be organized into Source: Asthma Reminders, CMET Reminders, EHR Clinical Reminders, Health Summary Reminders, HIV/AIDS Reminders.
Category	The name of the category for the particular source.
Reminder Name	The name of the reminder.
# Patients Eligible	The total number of patients in this panel who need individual reminders.
# Patients Current	“Current” is defined as any due date in the future (not including today).
% Current	The total percentage of patients in this panel who are current for an individual reminder, that is, [# Patient Current] divided by [#Patients Eligible]. Because of the one month “grace” period for the overdue definition, the total percentage of Current and Overdue cannot equal 100%.
# Patients Overdue	“Overdue” is defined as the due date equal or is before [today - 30 days]. This means the reminder is NOT counted as overdue for purposes of performance until at least a month. The total of the Patients Current and the Patients Overdue cannot equal the total Patients Eligible because of the one month “grace” period for the overdue definition.

Column	Meaning
% Overdue	The total percentage of patients in this panel who are overdue for an individual reminder. That is, [Patients Overdue] divided by [Patients Eligible]. Because of the one month grace period, the total percentage of Patients Current and Patients Overdue might not equal 100%.

There is hover help for each cell in the Reminders Name column

The National Measures glossary provides information about the measures. To view this glossary, select Help | National Measures Glossary.

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

5.2 Rem Aggregated Tab Toolbar

The toolbar displays the date/time the data is effective.

Section 12.2 provides information about the buttons on the right side of the toolbar.

To check on the status of the background jobs, do one of the following:

- Click the background jobs button
- Select File | Background Jobs

This action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

5.3 Rem Aggregated Tab Menu Options

5.3.1 File Menu

The options on the File menu for the Reminders Aggregated tab is the same as the options on the File menu for the Patient List tab.

5.3.2 Tools Menu

The options on the Tools menu for the REM Aggregated tab are:

Quick Patient Search: This option opens the Quick Patient Search (within Panel) dialog. This is the same as pressing the F8 key on your keyboard.

Glossary: This option displays the Reminders Glossary pop-up. The information provides Reminder descriptions (from RPMS). The pop-up has descriptions of the logic behind each national health summary reminder available for display in iCare. You can display, print, and save the Glossary text. This is the same as clicking the Glossary button.

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

User Preferences: This option opens the User Preferences window.

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

6.0 Natl Measures Tab

The Natl Measures tab displays IHS national clinical performance measures as defined and reported in the RPMS Clinical Reporting System (CRS). iCare uses CRS performance logic to display whether "your" patients are meeting annual performance goals.

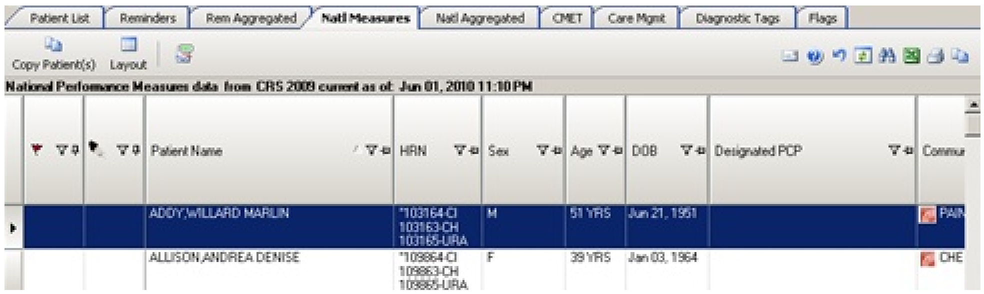


Figure 6-1: Sample National Measures tab

6.1 What is National Performance (GPRA)?

The Government Performance and Results Act (GPRA) requires federal agencies to report annually to Congress on how the agency measured up against the performance targets set in its annual Plan. Section Appendix A: provides information about a performance measure logic example.

Most performance measures have a denominator and a numerator defined.

- The denominator is the total population being reviewed
- The numerator is the number of patients from the denominator who meet the definition of the measure.

Some measures are just a count, such as Sealants and Topical Fluorides.

Measure example: GPRA Measure Cancer Screening: Pap Smear Rates: Maintain the proportion of female patients ages 21 through 64 without a documented history of hysterectomy who have had a Pap screen within the past three years at the previous year's level (60.0%).

The denominator is the total population that is being reviewed for a specific measure. For the Pap Smear measure, the denominator is all female patients ages 21 through 64 at the beginning of the Report period. The numerator is the number of patients in the denominator who meet specific criteria. For Pap Smear, the numerator is the number of patients in the denominator who had either a Pap smear, defined by certain codes, documented in RPMS any time in the three years prior to the end of the report period or a refusal of a Pap smear in the past year.

If you are not familiar with your facility's policies and practices related to national performance reporting, talk with your site GPRA coordinator.

6.2 Natl Measures Tab Layout

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The default columns are described below.

Column	Information
Flag indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags "off" in the User Preferences (see section **Error! Reference source not found.** Flag Setup Tab).
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click on it.
HRN	Patient's health record number. The HRN will display as the HRN number followed by the facility code.
Sex	F (for female) or M (for male).
Age	Patient's age.
DOB	Patient's Date of Birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	One or more predefined diagnosis definitions ("tags") that iCare has proposed for the patient that has a Proposed or Active status. See section **Error! Reference source not found.** Diagnostic Tags for more information.
Individual Columns	The value of the performance met.

If you double-click any record in the grid, the patient record window opens to the Natl Measures tab.

You can view the Community alert text by hovering your mouse over the Community Alert icon, if any. The icon does not affect the sorting of the Community column.

There is hover help for each performance column that displays the GPRA definition.

You can find information about all of the measures in the National Measures Glossary by selecting Help | Natl Measures Glossary.

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

6.3 Natl Measures Tab Toolbar

The toolbar shows the date/time for which the data is effective.

Section 12.2 provides for more information about the buttons on the right side of the toolbar.

6.3.1 Copy Patient(s)

The Copy Patient(s) function copies the patients information to the iCare clipboard. This is useful for selecting patients that need additional follow-up based on the measure information displayed.

Select one or more patients and then do one of the following:

- Click the Copy Patient(s)  button
- Select National Measures | Copy Patient(s)
- Use the keyboard combination Ctrl+C

You must go to another panel view (for a different patient panel) and paste the patient's information.

6.3.2 Layout

The Layout function determines which performance measures columns to display as well as the order and sorting that should be used in the current panel.

To change the layout, do one of the following:

- Click the Layout  button
- Select National Measures | Layout

The Natl Measures Layout screen for the current panel will display.

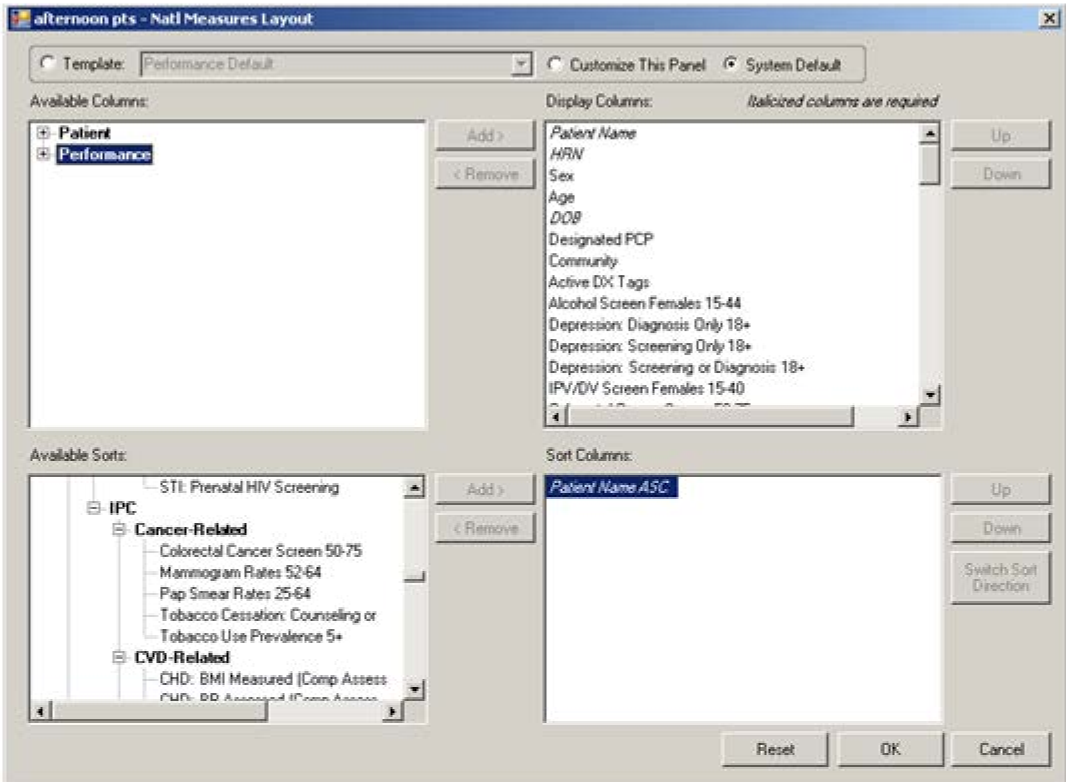


Figure 6-2: Natl Measures Layout window

If you choose to add the “CRS Pop” column (under Patient | Demographics) to the National Measures tab, it will display the value(s) describing the population category defined by CRS. The CRS Population categories include: UP (User Population), AC (Active Clinical), AD (Active Diabetic), etc. The population is a text string from the Denominator column of the CRS Patient List report that will be calculated for each patient within the weekly performance measures background process.

Section 12.5 provides information about using the features of the layout window.

6.3.3 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the background jobs  button
- Select File | Background Jobs

This action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

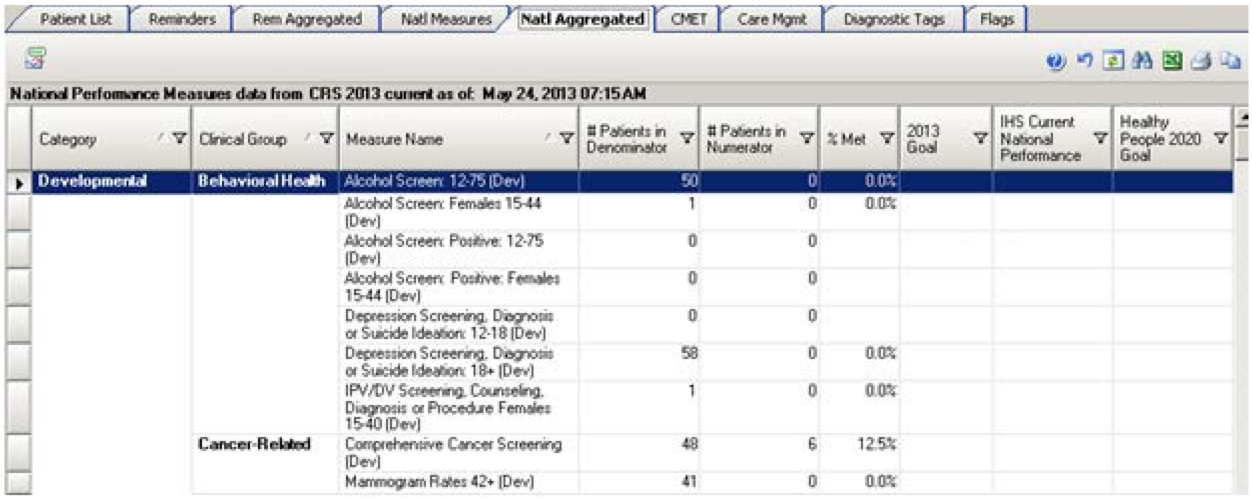
6.4 Natl Measures Tab Menu Options

The options on the File and Tool menus for the Natl Measures tab is the same as those on the Patient List tab. Section 3.3**Error! Reference source not found.** provides information about these menus.

The options on the Natl Measures menu operate like the action buttons on the toolbar. Section 6.3 provides information about the buttons.

7.0 Natl Aggregated Tab

The National Aggregated tab information is based on the format of the Summary Page from the CRS National GPRA report. It displays a summarized overview of the national performance measure data for patients in the panel being viewed.



Category	Clinical Group	Measure Name	# Patients in Denominator	# Patients in Numerator	% Met	2013 Goal	IHS Current National Performance	Healthy People 2020 Goal
Developmental	Behavioral Health	Alcohol Screen: 12-75 (Dev)	50	0	0.0%			
		Alcohol Screen: Females 15-44 (Dev)	1	0	0.0%			
		Alcohol Screen: Positive: 12-75 (Dev)	0	0				
		Alcohol Screen: Positive: Females 15-44 (Dev)	0	0				
		Depression Screening, Diagnosis or Suicide Ideation: 12-18 (Dev)	0	0				
		Depression Screening, Diagnosis or Suicide Ideation: 18+ (Dev)	58	0	0.0%			
		IPV/DV Screening, Counseling, Diagnosis or Procedure Females 15-40 (Dev)	1	0	0.0%			
	Cancer-Related	Comprehensive Cancer Screening (Dev)	48	6	12.5%			
		Mammogram Rates 42+ (Dev)	41	0	0.0%			

Figure 7-1: Sample Natl Aggregated tab

7.1 Natl Aggregated Tab Layout

The following data is displayed on the Natl Aggregated tab.

Category: the name of the category associated with the measure.

Clinical Group: the name of the clinical performance group.

Measure Name: the measure title derived from the Summary Report (iCare pulls from the first column of the CRS Summary Report). The hover help displays a description of the performance logic for each cell in the column.

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

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

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

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

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

Healthy People 2020 Goal: the value shows the 2020 goals detailed in CRS.

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

7.2 Natl Aggregated Tab Toolbar

The toolbar shows the date/time for which the data is current.

Section 12.2 provides more information about the buttons on the right side of the toolbar.

To check on the status of the background jobs, do one of the following:

- Click the background jobs button
- Select File | Background Jobs

This action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

7.3 Natl Aggregated Tab Menu Options

The options on the File menu for the Natl Aggregated tab are the same as those on the File menu on the Patient List tab.

The options on the Tools menu for the Natl Aggregated tab are the same as those on the Tools menu for the Reminders Aggregated tab.

8.0 CMET Tab

The CMET tab on the Panel View displays data related to the Events, Tracked Events, and Follow-up Events for the panel of patients.

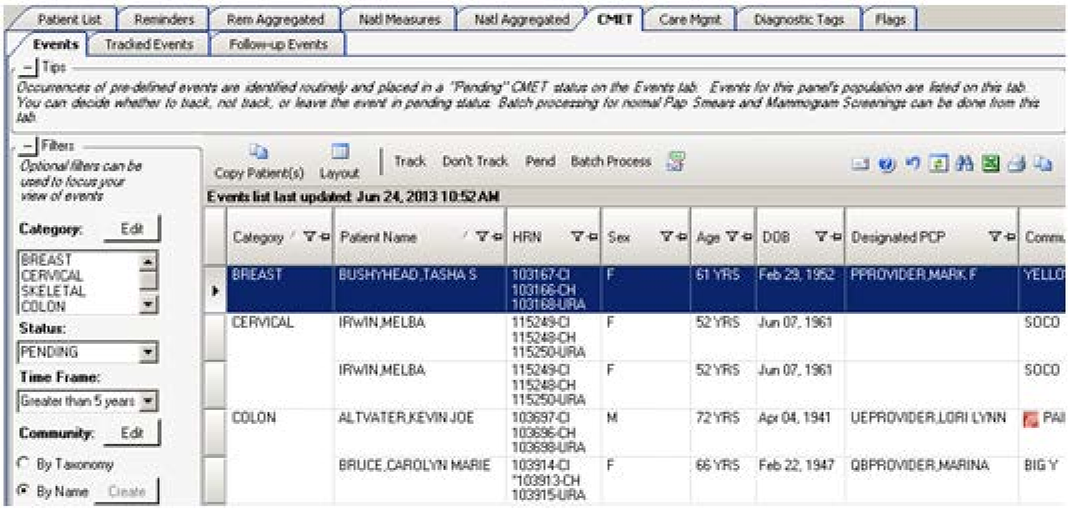


Figure 8-1: Sample CMET tab window

8.1 Events Sub-Tab

The Events sub-tab provides data that was last retrieved on the date displayed on this Events window.

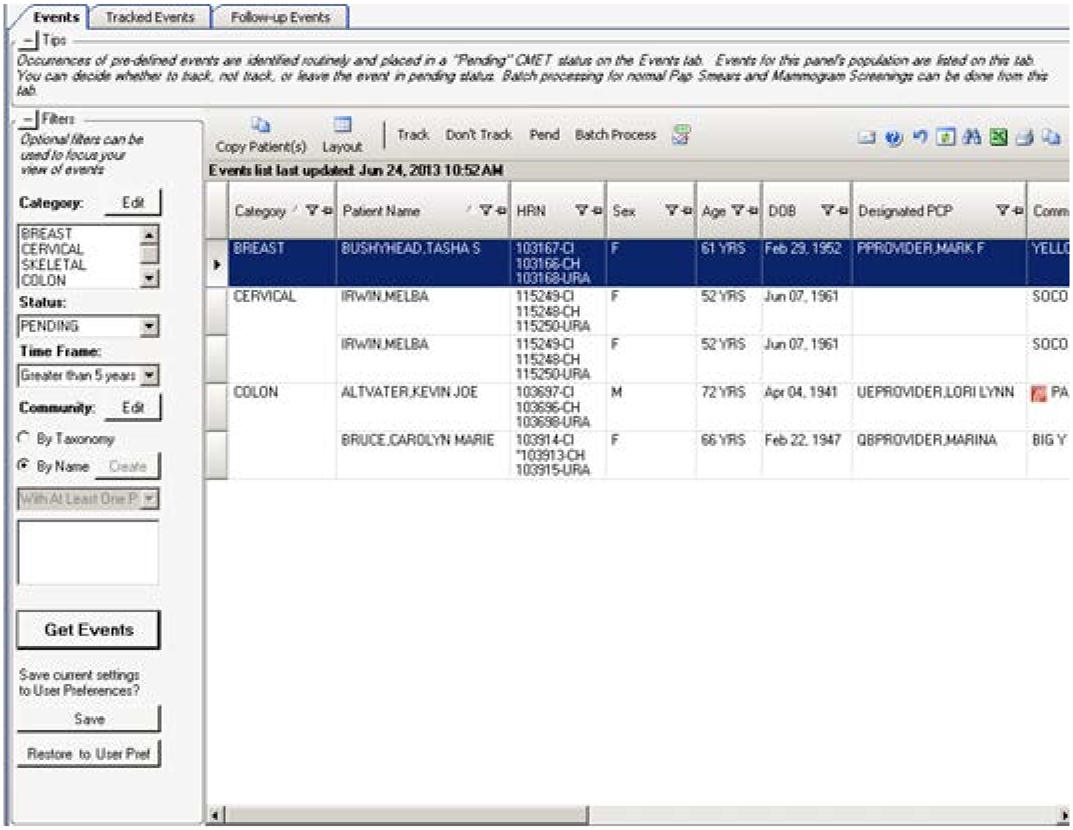


Figure 8-2: Sample Events sub-tab

The Events sub-tab is divided into three general area: Tips information, Events toolbar, and Events data.

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

Note: You can establish the default "collapse" status for the Tips area on this sub-tab. To do that, select Tools | User Preferences | CMET tab | Events sub-tab. The Tips check box on this sub-tab will establish the "collapse" status.

The default filters are established on the CMET tab (Events sub-tab) of user preferences. These filters are: Category, Status, Time Frame, and Community. Section 12.1.3 provides for more information about these filters.

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

The initial Data Mining will return the most recent occurrence of every event found with an established timeframe. These events are displayed on the Events sub-tab. Section 12.1.3.2 provides for more information about the timeframes.

8.1.1 Filters Group Box

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

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

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

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

8.1.2 Events Sub-Tab Layout

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The following table provides information about the default columns.

Column	Meaning
Category	The category of the event: Breast, Cervical, Colon, Skeletal, STI.
Patient Name	Required field that will link to the Events sub-tab of the CMET tab on the Patient Record if you double-click on the name.
HRN	Patient's Health Record Number.
Sex	F (for female) or M (for male)
Age	Patient's age today.
DOB	Patient's date of birth
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function.
Event Name	Name of the event.
Event Date	The date associated with the event.
Result	The date of the result of the event. This cell also has hover help, such as V Radiology.
Status	The status of the event.
Status Comments	Text of the any comments about the status.
Last Modified Date/Time	The date and time the record was last modified.

Column	Meaning
Last Modified By	The name of the person who last modified the record. Initial job means it is the initial record.

You can view the Community alert text by hovering your mouse over the Community Alert  icon, if any. The icon does not affect the sorting of the Community column.

Double-click the underlined Event Date to access the Visit Detail pop-up.

Double-click the underlined Result Date to access a particular detail pop-up, for example, Women’s Health Detail.

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

8.1.3 Events Sub-Tab Toolbar

The toolbar shows the date/time the data is effective.

Section 12.2 provides information about the buttons on the right side of the window.

8.1.3.1 Copy Patient(s)

The Copy Patient(s) function copies the patients information to the iCare clipboard.

Select one or more patients and then do one of the following:

- Click the Copy Patient(s) 

 button
- Select CMET | Events | Copy Patient(s)
- Use the keyboard combination Ctrl+C

You must go to another panel view (for a different patient panel) and paste the patient’s information.

8.1.3.2 Layout

The Layout function determines the columns on the Events sub-tab for the current panel.

You can select the layout function by doing one of the following:

- Clicking the Layout 

 button
- Selecting File | Layout
- Selecting CMET | Events | Layout

This action accesses the Events Layout window.

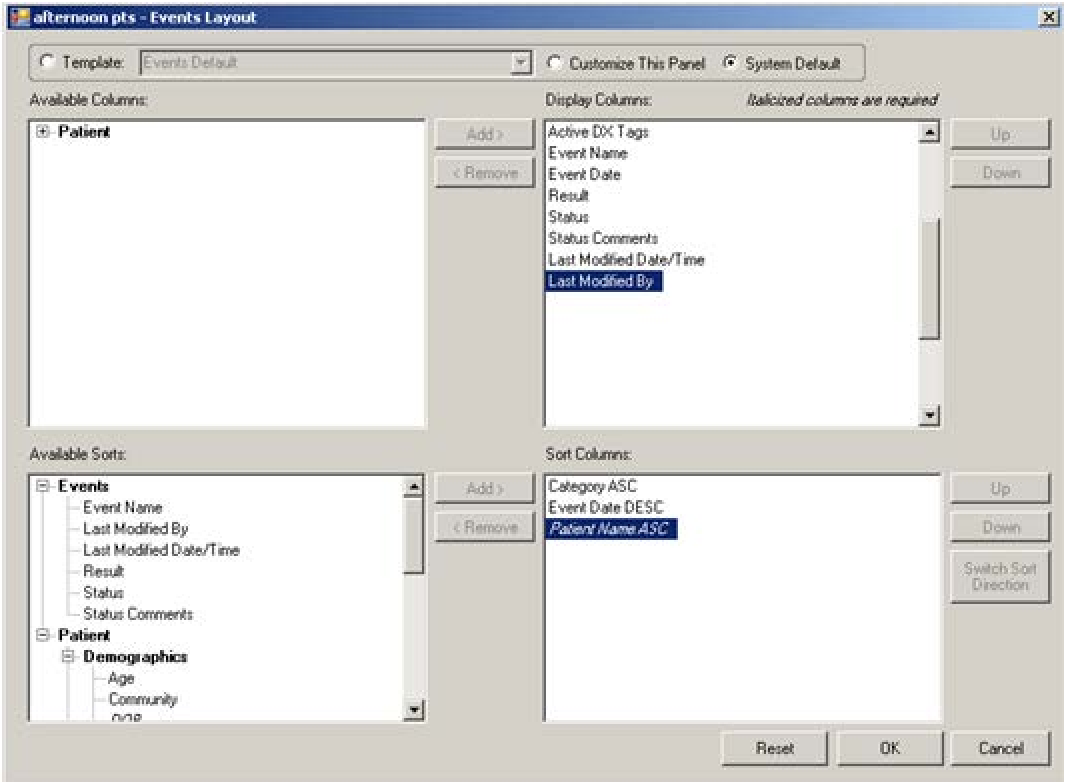


Figure 8-3: Events Layout window

Section 12.5 provides information about using the features of the layout window.

8.1.3.3 Track

The Track function requires the iCare Editor (BQIZCMED) security key. Select one or more events with a status of Not Tracked or Pending and then click the Track button (or select Track on the context menu).

Once an event has been Tracked, it cannot be changed to Not Tracked. If the particular event was changed to Tracked and that is not correct, you need to go to the Tracked tab, then access the CMET worksheet for the event you tracked in error.

If you select events that are not eligible for the Tracked function, the application displays the message: Events having a status of Tracked can't be changed to Tracked. Click OK to dismiss the message.

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

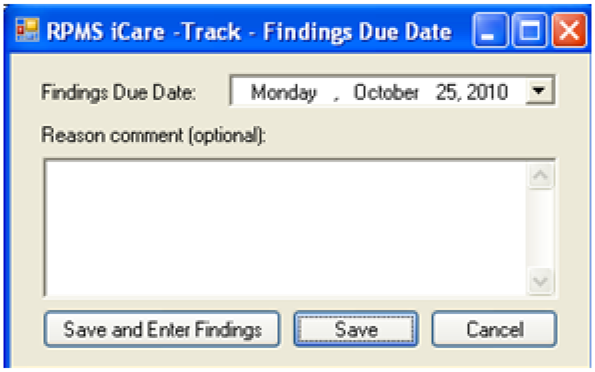


Figure 8-4: Sample RPMS iCare - Track - Findings Due Date dialog

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

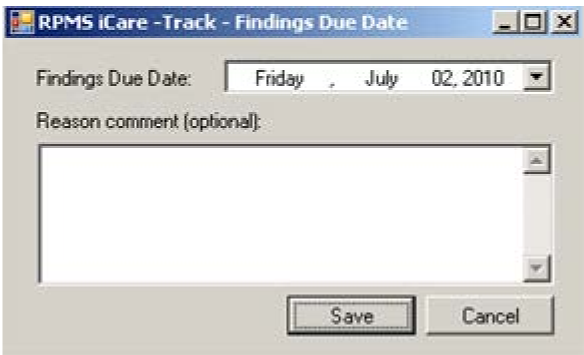


Figure 8-5: Sample RPMS iCare - Track - Findings Due Date dialog for multiple events

In either case, do the following:

- Make sure that the correct date is in the Findings Due Date field (required). Change it by clicking the drop-down list to access a calendar (where you can select another date). The date cannot be earlier than the current date.
- Type the text of the reason for changing the status to TRACKED in the Free Text field (not required).
- Click Save to save the information. (Otherwise, click Cancel). When you use Save, this changes the status of the events to Tracked. These events will display on the Tracked events sub-tab of the main window as well as on the Tracked Events sub-tab of the Patient Record window.

If you use the "Save and Enter Findings" button for a single event, the application displays the CMET Worksheet (where you can add Findings to the event, for example). Section 12.9**Error! Reference source not found.** provides for more information about the worksheet. After saving the worksheet, you return to the Events sub-tab.

8.1.3.4 Don't Track

Use the Don't Track button to change the status of a Pending event to Not Tracked. Select the events and click Don't Track (or select Don't Track on the context menu).

If you select Tracked events, they are not eligible for the Not Tracked function. In this case, the application displays the message: Once an event has been Tracked, it cannot be changed to Not Tracked. See the User Manual guidance on how to manage an event that was tracked. Click OK to dismiss the message. If the selected Tracked event was erroneously tracked in error, section 12.13 provides for more information about how to handle this error.

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

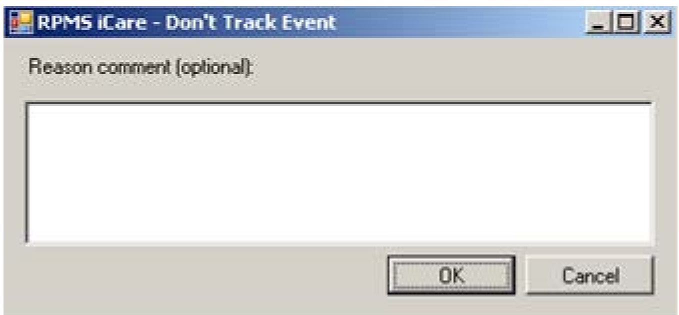


Figure 8-6: Sample RPMS iCare – Don't Track Event dialog

Type a reason for the change in the Free Text field (not required). Click OK to save and change the Status of the events to Don't Track. (Otherwise, click Cancel.)

8.1.3.5 Pend

Use the Pend button to change the status of Not Tracked event to Pending. Select the events and then click the Pend button (or select Pend on the context menu).

If you select events that are not eligible for the Pend function, the application displays the message: Only events with status of Not Tracked can change to Pending. Click OK to dismiss the message.

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

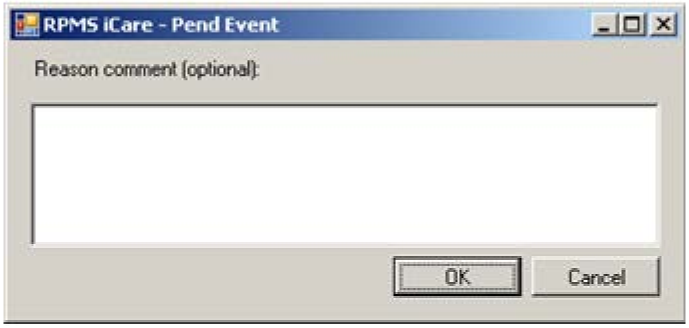


Figure 8-7: Sample RPMS iCare – Pend Event dialog

Type a reason for the change in the Free Text field (not required). Click OK to save and change the Status of the events to Pending. (Otherwise, click Cancel.)

8.1.3.6 Batch Process

The Batch Process only applies to screening mammograms and pap smears with normal results. This process can be applied to multiple events. Although it can be applied to one event, its purpose is to be applied to multiple events.

The CMET Package Manager sets the parameters for batch processing for the entire site. The Batch Process function requires the iCare Editor (BQIZCMED) security key.

The Batch Process works only on events that are Pending. Otherwise, the application will display an error message.

Select either the mammogram screening events or the pap smear events that you want to batch process. Then, click the Batch Process button (or select Batch Process on the context menu) to batch process the selected events and to change the Status/State to Closed. (The selected events must be of the same type of event, either all mammogram screenings or all pap smears.)

- If you selected the mammogram screening events that are eligible for this process, the application displays the CMET Batch Mammogram Screening dialog. Section 12.10 provides for more information about this dialog.
- If you selected the pap smear events that are eligible for this process, the application displays the CMET Batch Pap Smear dialog. Section 12.11 provides for more information this dialog.

8.1.3.7 Status of Background Jobs

Click the Status of Background Jobs  button to check the status of the background jobs; this displays the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

8.2 Tracked Events Sub-Tab

The CMET events that are identified as “Tracked” for the current panel will display on the Tracked Events sub-tab.

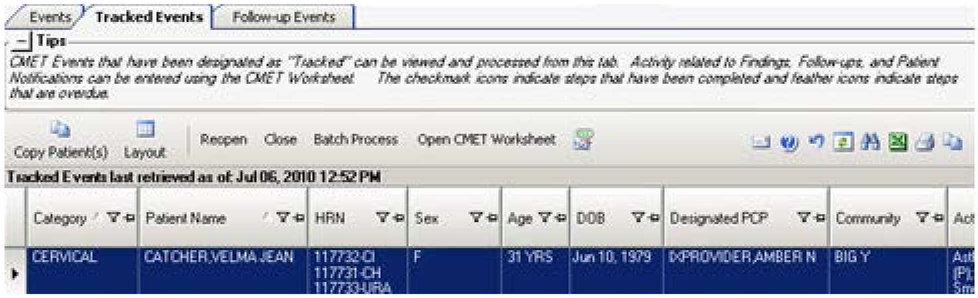


Figure 8-8: Sample Tracked Events sub-tab

The Tracked Events sub-tab is divided into three general area: Tips information, Tracked Events toolbar, and Tracked Events data.

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

8.2.1 Tracked Events Sub-Tab Layout

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

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The following table provides information about the columns.

Column	Meaning
Category	The category of the tracked event: Breast, Cervical, Colon. Skeletal, STI.
Patient Name	Required field that will link to the Tracked Events sub-tab of the CMET tab on the Patient Record if you double-click on it.
HRN	Patient’s Health Record Number.
Sex	F (for female) or M (for male)
Age	Patient’s age today.
DOB	Patient’s date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient’s community of residence.
Active DX Tags	Predefined Diagnosis definitions (“tags”) that iCare has proposed for this patient, based on the tagging function.
1 - Event	Name of the event.
Event Date	The date associated with the event.

Column	Meaning
Preceding Event	Contains the date of the preceding event. Double-click on this underlined date to open the Tracked Events of the CMET tab on the Patient Record. The chain of events in the same category is revealed. In addition, there is hover help when you move your mouse over the date (for example, PAP SMEAR 139).
Results	The date of the result of the event. Hover help will describe where the result came from (V-RADIOLOGY, V-LAB).
2 - Finding(s)	The icons indicate if the event has any findings.
Interpretation	The interpretation of the Finding.
3 - Follow-up(s)	The icon indicates if the event has follow-up data.
4 - Patient Notification(s)	The icon indicates if the event has any patient notification data.
State	The state of the tracked event (Open or Closed).

When the 2 - Finding(s) cell contains the following:

- the “feather” icon indicates that the element is overdue; hover your mouse over the icon to view the Due Date (the tickler).
- the check icon indicates that the step is complete; hover your mouse of the icon to view the Finding Due date and the Finding Value.
- is blank indicates that the element is not complete but is not overdue.

When the 3 - Follow-up(s) cell contains the check icon, this means the step is complete; hover your mouse of the icon to view the Follow-up Date and the Follow-up type. If it is blank, this indicates that element is not complete but is not overdue.

When the 4 - Patient Notification(s) cell contains the check icon, this means the step is complete; hover your mouse of the icon to view the Notification Date and the Notification method. If it is blank, this indicates that element is not complete but is not overdue.

The Results column will display the date (Linked) if results have been mined during the nightly job. The data link will be the most recent result. Hover help will describe where the result came from, for example, v-lab.

8.2.2 Tracked Events Sub-Tab Toolbar

The toolbar shows the date/time for which the data is effective.

Section 12.2 provides more information about the buttons on the right side of the window operate.

8.2.2.1 Copy Patient(s)

The Copy Patient(s) button works like the one on the Events sub-tab. Section 8.1.3.1 provides information about this button.

8.2.2.2 Layout

Use the Layout function to determine the columns on the Tracked Events sub-tab for the current panel.

Select the layout function by doing one of the following:

- Clicking the Layout  button
- Selecting File | Layout
- Selecting CMET | Tracked Events | Layout

This action accesses the Tracked Events Layout window.

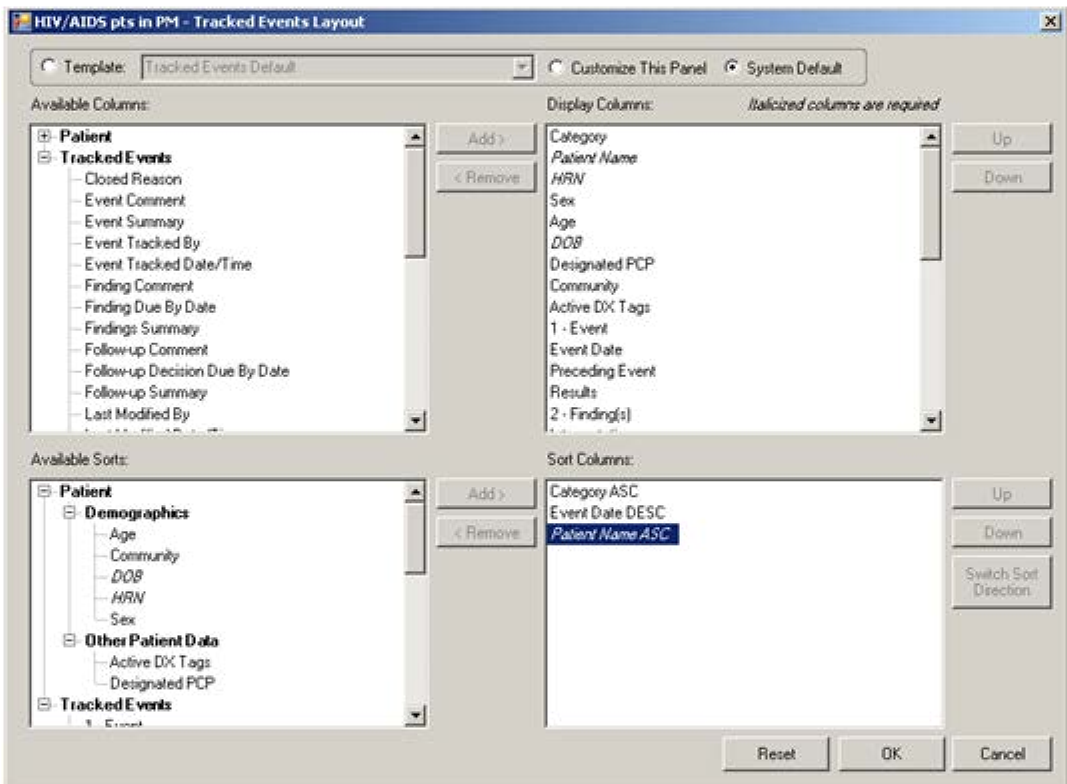


Figure 8-9: Tracked Events Layout window

Section 12.5 provides information about using the features of the layout window.

8.2.2.3 Reopen

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

Figure 8-10: RPMS iCare – Reopen Tracked Event dialog

Type the reason for changing the state back to Open in the Free Text field (not required). When the dialog is complete, click OK to change the State for the event to Open. (Otherwise, click Cancel.)

If you select more than one event and use the Reopen function, the application displays the warning message: Please reselect as only one event can be reopened at one time. Click OK to close the warning message and select only one event.

8.2.2.4 Close

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

Figure 8-11: RPMS iCare – Reason for Closing dialog

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

Reason: select an option from the drop-down list: Event Complete, Patient Moved, Lost to Follow-up, Other (this option requires a comment).

Comment: this Free Text field is required when the Reason = Other. Type the text of the reason.

When the dialog is complete, click OK to change the State for the selected events to Close. (Otherwise, click Cancel.)

8.2.2.5 Batch Process

The Batch Process works like the Batch Process on the Events sub-tab. Section 8.1.3.6 provides information about the batch process.

8.2.2.6 Open CMET Worksheet

Select a event and then click the Open CMET Worksheet button (or select Open CMET Worksheet on the context menu) to access the CMET Worksheet (for the event). Here you can enter Finding(s), Follow-up(s), and Patient Notification(s) for the event. Section 12.9 provides for more information about the worksheet. **Note**: this function can be applied to only one event.

8.2.2.7 Status of Background Jobs.

To check on the status of the background jobs, do one of the following:

- Click the Background Jobs button
- Select File | Background Jobs

This displays the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

8.3 Follow-up Events Sub-Tab

The Follow-up Events sub-tab contains what you want to do for follow-up. The follow-up events are generated by the recommendation(s) made for the follow-up of the “Tracked” CMET event.

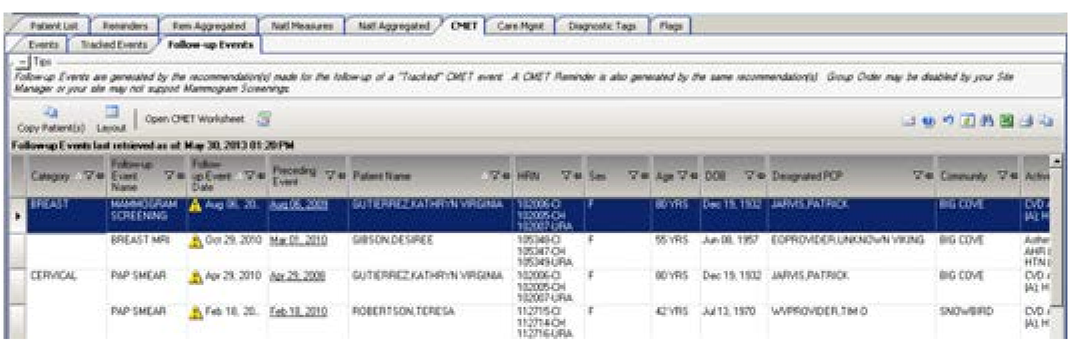


Figure 8-12: Sample Follow-up Events sub-tab

The Follow-up Event Name and Date are pulled from step 3 of the CMET process. This is the provider's recommendation for follow-up. The date is the date due for the follow-up.

A CMET Reminder is also generated by the same recommendation(s). Group Order might be disabled by your Site Manager or your site might not support Mammogram Screenings.

The Follow-up Events sub-tab is divided into three general area: Tips information, Follow-up Events toolbar, and Follow-up Events data.

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

8.3.1 Follow-up Events Sub-Tab Layout

The data on the Follow-up Events sub-tab is effective as of the date on the window.

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The following table provides information about the columns.

Column	Meaning
Category	The category for the Follow-up Event: Breast, Cervical, Colon, Skeletal.
Follow-up Event Name	The name of the event.
Follow-up Event Date	The follow-up date for the event.
Preceding Event	Contains the date of the preceding event. Double-click on this underlined date to open the Follow-up Events of the CMET tab on the Patient Record. The chain of events in the same category is revealed.
Patient Name	Required field that will link to the Follow-up Events sub-tab of the CMET tab on the Patient Record if you double-click the name.
HRN	Patient's Health Record Number.
Sex	F (for female) or M (for male)
Age	Patient's age today.
DOB	Patient's date of birth (required)
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function.

You can view the Community alert text by hovering your mouse over the Community Alert icon, if any. The icon does not affect the sorting of the Community column.

8.3.2 Follow-up Events Sub-Tab Toolbar

8.3.2.1 Copy Patient(s)

The Copy Patient(s) button works like the one on the Events sub-tab. Section 8.1.3.1 provides information about this button.

8.3.2.2 Layout

Use the Layout function to determine the columns on the Follow-up Events sub-tab for the current panel.

Select the layout function by doing one of the following:

- Clicking the Layout 

button
- Selecting File | Layout
- Selecting CMET | Follow-up Events | Layout

This action accesses the Follow-up Events Layout window.

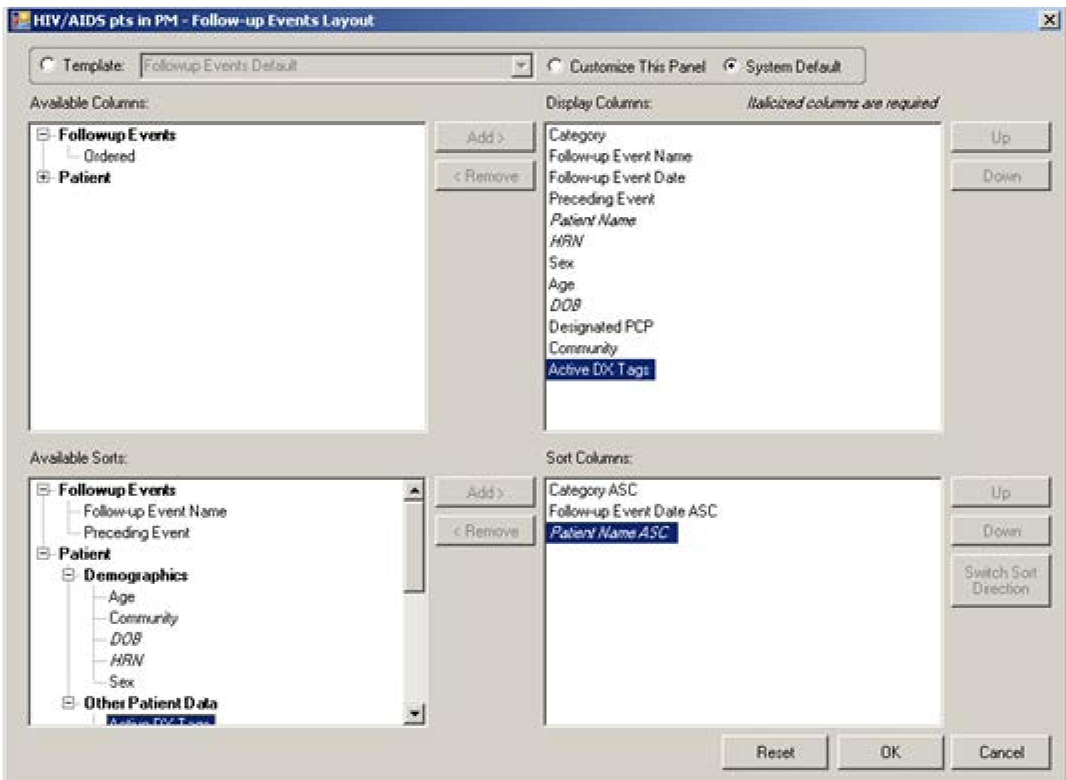


Figure 8-13: Follow-up Events Layout window

Section 12.5 provides information about using the features of the layout window.

8.3.2.3 Open CMET Worksheet

Select a event and then click the Open CMET Worksheet button (or select Open CMET Worksheet on the context menu) to access the CMET Worksheet (for the event). Here you can enter Finding(s), Follow-up(s), and Patient Notification(s) for the event. Section 12.9 provides for information about the worksheet. **Note**: this function can be applied to only one event.

8.3.2.4 Status of Background Jobs.

To check on the status of the background jobs, do one of the following:

- Click the Background Jobs button
- Select File | Background Jobs

This displays the RPMS iCare - Background Jobs window. Section 12.8 provides information about this window.

8.4 CMET Tab Menu Options

8.4.1 File Menu

The options on the File menu for the CMET tab are similar to those on the File menu for the Patient List tab.

8.4.2 Tools Menu

The options on the Tools menu for the CMET tab are the same as the options on the Tools menu for the Patient List tab.

8.4.3 CMET Menu

The options on the CMET menu operate like the action buttons on the various sub-tabs.

9.0 Care Mgmt Tab

The Care Mgmt tab displays data related to various groups of the patients in the panel.

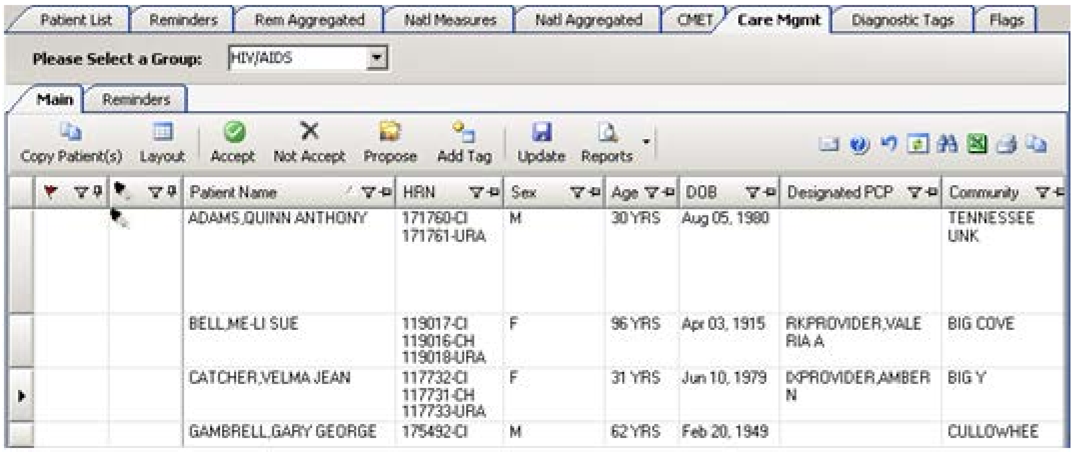


Figure 9-1: Sample Care Mgmt tab

This tab displays information from the register (shown in the “Please Select a Group field”) for the patients in the panel. You must select an option for this field in order to view the data.

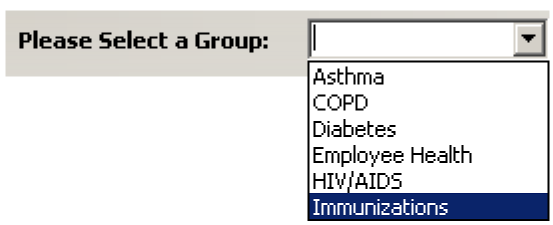


Figure 9-2: Various groups for the Care Mgmt tab

iCare provides you with existing Register capabilities for iCare panels for specific underlying case management applications.

The underlying RPMS application for the HIV/AIDS Register option is BKM.

9.1 User Preferences for Panel View

You access User Preferences for Panel View by selecting Tools | User Preferences.

You can establish the tab and panel to display when opening the Panel View on the Panel View window.

You can establish Panel View as the startup view when opening iCare on the Startup View tab.

Section 12.1 provides more information about using the User Preferences for the Panel View window.

9.2 Main Sub-Tab

The Main sub-tab displays register information about the patients in the particular panel.

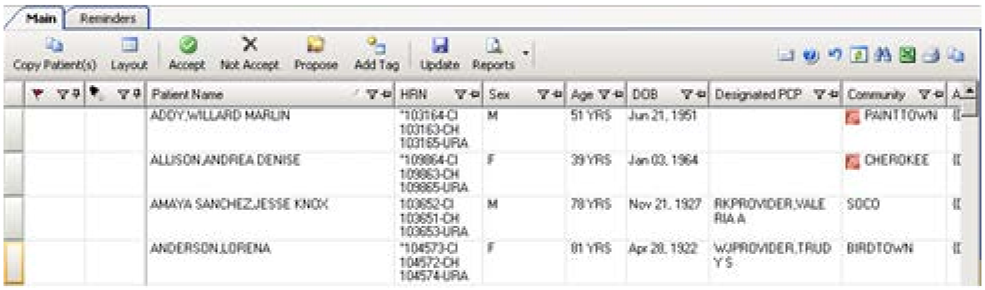


Figure 9-3: Sample Main Sub-Tab View for HIV/AIDS register

> **Note**: Only the Main sub-tab displays for Diabetes, Immunizations, Employee Health, and COPD groups.

Section 9.4 provides information about the Main tab for Asthma.

9.2.1 Main Sub-Tab Layout

The following table provides information about the default columns for the COPD, Diabetes, Employee Health, HIV/AIDS, and Immunizations groups.

Column	Meaning
Flag indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags “off” in the User Preferences.
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click the name.
HRN	Patient’s Health Record Number.
Sex	F (for female) or M (for male).
DOB	Patient’s date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient’s community of residence.
Active DX Tags	Predefined Diagnosis definitions (“tags”) that iCare has proposed for this patient, based on the tagging function.
Register Status	The status of this patient on the HMS Register. Values are can Active, Deceased, Inactive, or Transient.

Column	Meaning
Remaining Columns	The register-specific data.

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

There is hover help for the columns displaying register-specific data. For example, there is view the help by hovering your mouse over the HIV Provider column heading.

You can view the Community alert text by hovering your mouse over the Community Alert  icon, if any. The icon does not affect the sorting of the Community column.

The Community Alerts glossary provides a list of diseases that occur in mandatory alerts. To view this glossary, select Help | Community Alerts Glossary (on the main iCare window).

9.2.2 Main Sub-Tab Toolbar

Section 12.2 provides information about the buttons on the right side of the toolbar.

9.2.2.1 Copy Patient(s)

This action copies the patients information to the iCare clipboard.

Select one or more patients and then do one of the following:

- Click the Copy Patient(s) 

 button
- Select Care Mgmt | Main | Copy Patient(s)
- Use the keyboard combination Ctrl+C

You must go to another panel view (for a different patient panel) and paste the patient’s information.

9.2.2.2 Layout

Click the Layout button (or select Care Mgmt | Main | Layout) to display the panel’s layout of the columns.

Section 12.5 provides information about using the features of the layout window.

9.2.2.3 Change Status

> **Note**: The Change Status buttons do not apply to Employee Health and Immunizations groups.

You use the Accept, Not Accept, and Proposed buttons to change the Status on an existing record (or select Care Mgmt | Main to select a status to change).

Select the patient record whose status you want to change and click the appropriate “change status” button to display the Update Diagnostic Tag dialog.

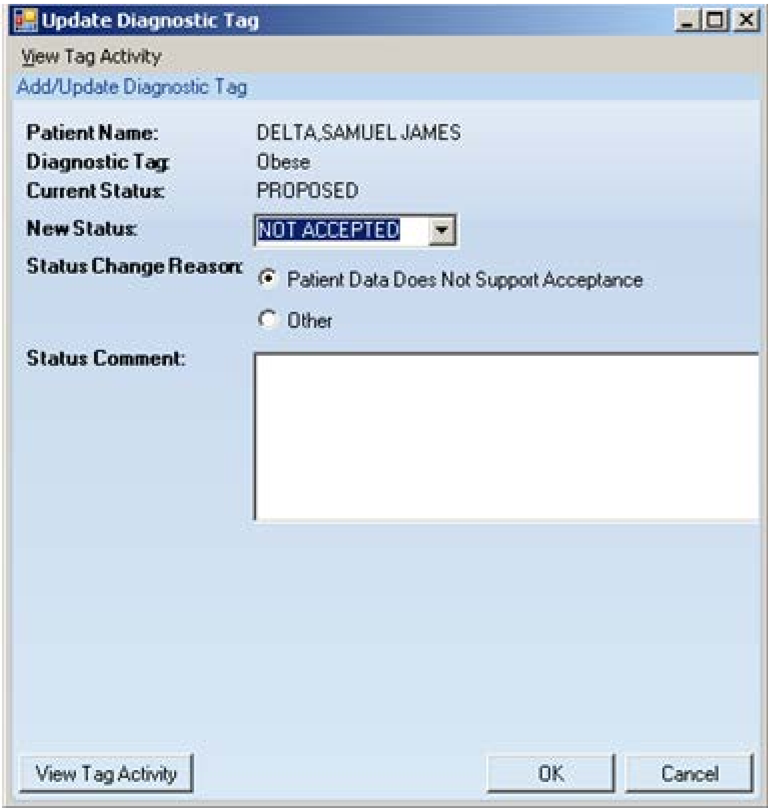


Figure 9-4: Sample Update Diagnostic Tag dialog

All fields are required on this dialog.

The radio buttons available for the Status Change Reason changes according to what you select in the New Status field.

The “Not Accept” function cannot be performed on multiple patients or multiple tags.

Section 10.2.3 provides information about the fields and “View Tag Activity” button on this dialog.

9.2.2.4 Add Tag

Note:	The Add Tag button does not apply to Employee Health and Immunizations groups.

Select a patient to which you want to add a tag and then click the Add Tag 

button (or select Care Mgmt | Main | Add Tag) to display the Add Diagnostic Tag dialog. This is a manual add that allows a provider to manually assign one or more of the diagnosis tags to patients that did not meet the tag's criteria for being proposed automatically. Section 10.2.3 provides information about using the Add Tag button.

9.2.2.5 Update

> **Note**: The Update button applies to the HIV/AIDS group only.

You can batch update register data for selected patients by clicking the Update 

button (or by selecting Care Mgmt | Main | Update). The Batch Update Data dialog will display.

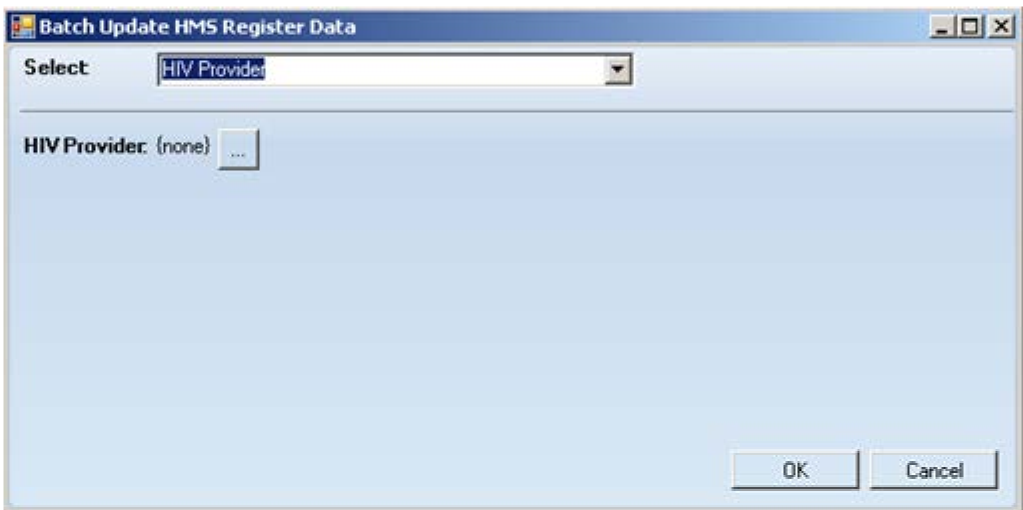


Figure 9-5: Sample Batch Update Data Dialog

After you choose an option from the Select drop-down list, a second field displays. When the second field has an ellipsis button, click it to search for the name on a lookup dialog.

Click OK to save your information. (Otherwise, click Cancel). After the update is complete, the following message displays: HIV Register data has been saved successfully to RPMS. Click OK to dismiss this message. After clicking OK, you need to refresh the screen in order to see the changes.

9.2.2.6 Reports Button

> **Note**: The Reports button is not active for Employee Health and Immunizations groups.

Select one or more patients and click the drop-down list on Reports 

button to view the Quality of Care report (or select Care Mgmt | Main | Reports).The reports define their scope based on the patients that are members of a given panel.

If any taxonomy does not have any entries, the application displays the iCare Taxonomy Report Check information message that lists the taxonomies that do not have any entries. The bottom of the message states: The HIV Management System Quality of Care uses these taxonomies when generating the report. Use the option “Tools > Taxonomy Maintenance” from the iCare main menu to view and edit these lists. Choose OK to continue and generate the report. Section 12.6 provides information about the taxonomy maintenance process.

Quality of Care Report

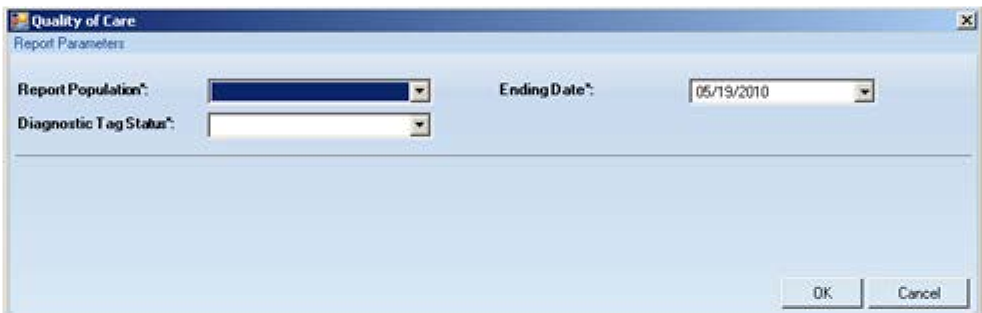


Figure 9-6: Quality of Care dialog

If you selected more than one patient on the panel, the Report Population field will display “Selected Patient(s) (n selected)” where n is the number of patients selected.

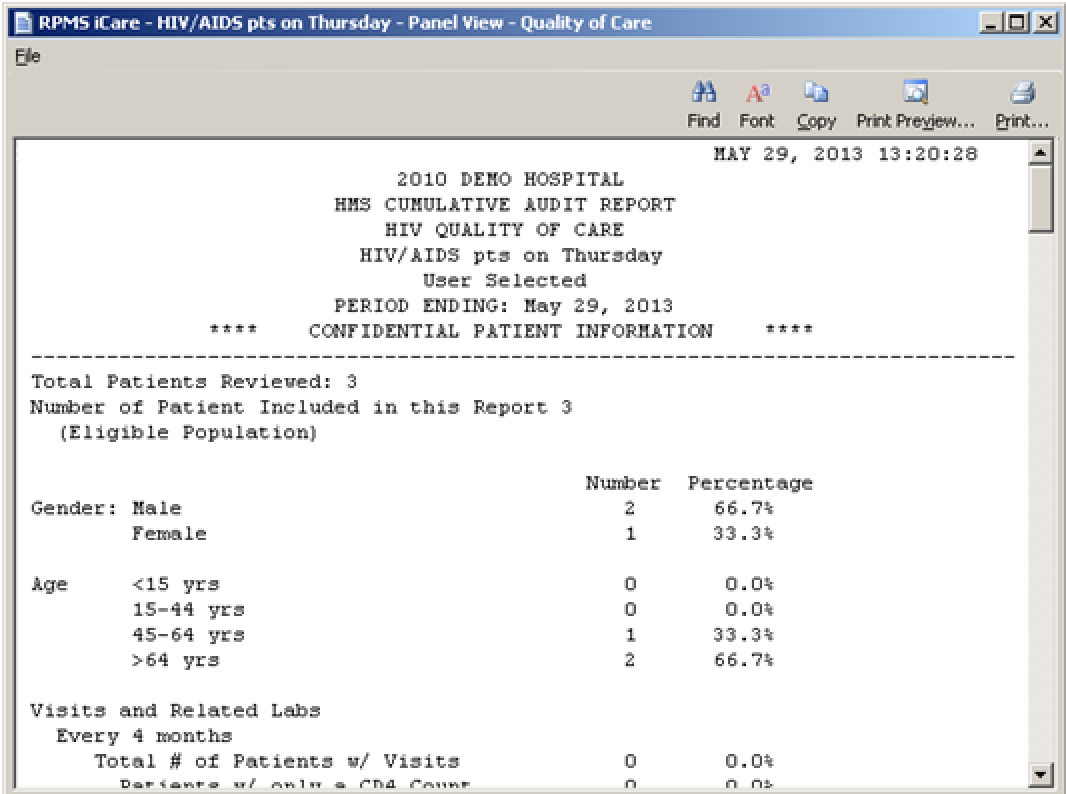
You populate the fields on the Quality of Care dialog by selecting any option on the drop-down list. Then, click OK to output the report. (Otherwise, click Cancel.)

> Note: If the report cannot be run, for example when the selected patients for the report did not meet the criteria, the application displays message about this condition. Click OK to dismiss the message.

iCare will provide the ability to display, print, and export the existing BKM Quality of Care Report from the Panel Register view.

This report includes all patients who have at least one HIV/AIDS POV or Active Problem List or HMS Initial HIV Dx Date or HMS Initial AIDS Dx Date at least 182 days (6 months) prior to Report End Date.

Below is an example of the first part of the report:




```
                                                 MAY 29, 2013 13:20:28
                         2010 DEMO HOSPITAL
                     HMS CUMULATIVE AUDIT REPORT
                         HIV QUALITY OF CARE
                      HIV/AIDS pts on Thursday
                           User Selected
                    PERIOD ENDING: May 29, 2013
           ****    CONFIDENTIAL PATIENT INFORMATION    ****
------------------------------------------------------------------------------
Total Patients Reviewed: 3
Number of Patient Included in this Report 3
  (Eligible Population)

                                            Number  Percentage
Gender: Male                                   2       66.7%
        Female                                 1       33.3%

Age     <15 yrs                                0        0.0%
        15-44 yrs                              0        0.0%
        45-64 yrs                              1       33.3%
        >64 yrs                                2       66.7%

Visits and Related Labs
  Every 4 months
     Total # of Patients w/ Visits             0        0.0%
       Patients w/ only a CD4 Count            0        0.0%
```

Figure 9-7: Sample Report, Page 1

The following shows a page of the report, near the bottom, describes the criteria of the selected denominator for the report.

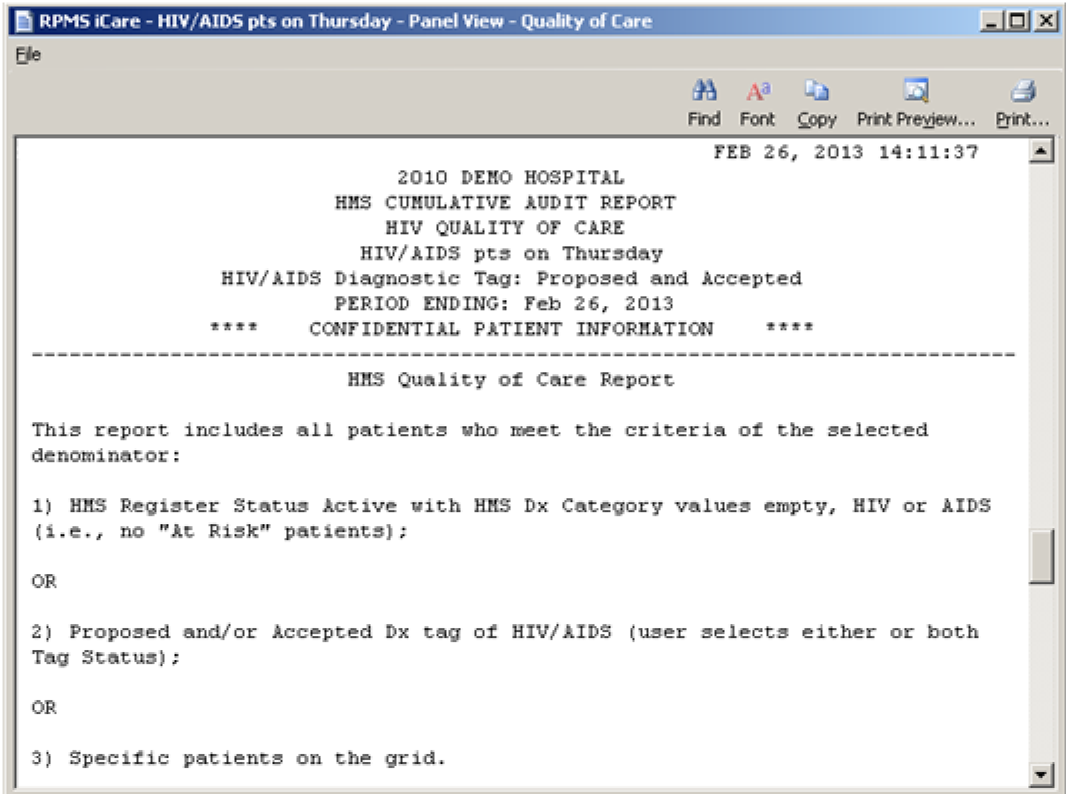


Figure 9-8: Page of Report near bottom

The final page of the report displays all of the patients in the selected denominator (those patients on the report).

Section 12.7 provides information about using the controls on the pop-up.

9.3 Reminders Sub-Tab for HIV/AIDS Register

The Reminders sub-tab view displays the disease/register-specific reminders for the patient.

Figure 9-9: Sample Reminders sub-tab

The Reminders sub-tab displays ONLY for the HIV/AIDS register.

9.3.1 Reminders Sub-Tab for HIV/AIDS Register Layout

Below are the default fields on the Reminders sub-tab for the HIV/AIDS Register:

Column	Meaning
Flag  indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags "off" in the User Preferences (see section **Error! Reference source not found.** Flag Setup Tab).
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click on it.
HRN	Patient's Health Record Number.
DOB	Patient's date of birth.
Remaining Columns	The reminders for the HIV/AIDS register-specific data.

A date (or "N/A") will be displayed under each of the Reminders columns. If the test or procedure is currently due. An icon will display if the test or procedure is overdue, as shown below.

Figure 9-10: Sample Overdue Date for Chlamydia Reminder

9.3.2 Reminders Sub-Tab for HIV/AIDS Register Toolbar Options

The toolbar shows the date/time for which the data is effective.

You can display a tooltip about a reminder by hovering your mouse over the column heading.

Click the Copy Patient(s) 

button (or select Care Mgmt | Main | Copy Patient(s)) to copy the selected patients information to the iCare clipboard. You must go to another panel view (for a different patient panel) and paste the patient's information.

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

Section 12.2 provides information about the buttons on the right side of the toolbar.

9.4 Main Sub-Tab for Asthma

Only the Main sub-tab displays for the Asthma option for the “Please Select a Group” field.

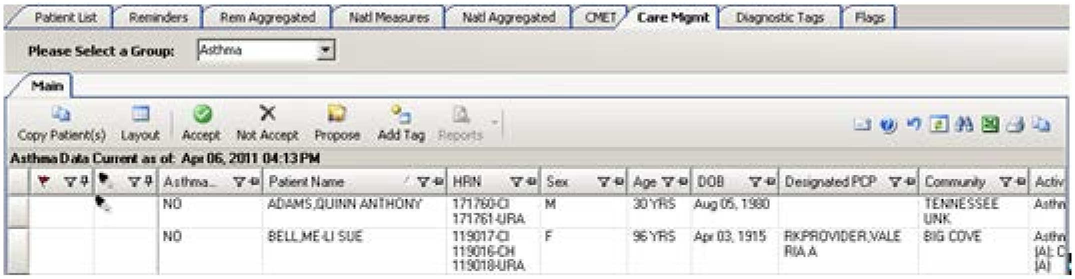


Figure 9-11: Sample Main sub-tab for Asthma

9.4.1 Main Sub-Tab for Asthma Layout

The data on the Main sub-tab enables users to view asthma-related data in the context of the population.

The following table provides information about the default fields.

Column	Meaning
Flag indicator	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags “off” in the User Preferences.
	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub-tab to review this condition.
Asthma	If this patient has an Active Asthma Diagnostic Tag (Proposed or Accepted), are ALL of the following key elements documented: Asthma Severity value ever; Asthma Control and Peak Flow or FEV1 measurement and Asthma Action Plan and Flu Shot in past year; and current Controller medication prescription if Severity is Persistent (2, 3 or 4)? Display: Y - Yes, the patient has documentation regarding of each of the quality of care elements. N - No, the patient does not have documentation of each of the quality of Care elements. N/A - Not Applicable, the patient does not have an active Asthma Diagnostic Tag.
Patient Name	Required field that will link to the Care Management window, Asthma group when you double-click the name.
HRN	Patient’s Health Record Number.
Sex	F (for female) or M (for male).
DOB	Patient’s date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.

Column	Meaning
Community	Patient’s community of residence.
Active DX Tags	Predefined Diagnosis definitions (“tags”) that iCare has proposed for this patient, based on the tagging function.
Remaining Columns	Register-specific columns

If a Community cell contains the Community Alert icon, you can view the Community Alert text by hovering your mouse over the icon.

There is hover help for the columns displaying register-specific data. For example, there is view the help by hovering your mouse over the Asthma Severity column heading.

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

9.4.2 Main Sub-Tab for Asthma Toolbar

The toolbar displays the date/time for which the asthma-related data is effective.

Section 12.2 provides information about the buttons on the right side of the toolbar.

Section 9.2.2 provides information about the Main sub-tab toolbar options.

9.5 Care Mgmt Tab Menus

The options on the File menu for the Care Management Tab are the same as those on the Patient List tab. Section 3.3.1 provides information about the File menu options.

The options on the Tools menu for the Care Management Tab are the same as those on the Reminders tab. Section 4.3.2provides information about the Tools menu.

The options on the Care Mgnt menu varies according to if you are on the Main or Reminders sub-tab. The options on each are the same as the action buttons on the toolbar.

10.0 Diagnostic Tags Tab

The Diagnostic Tags tab provides a comprehensive view of all tag history for a patient (regardless of the tag status), provides auto-accept and auto-reject capabilities, allows the user to accept a proposed tags for multiple patients, allows the user to reject proposed tags, and allows the user to update of tag status.

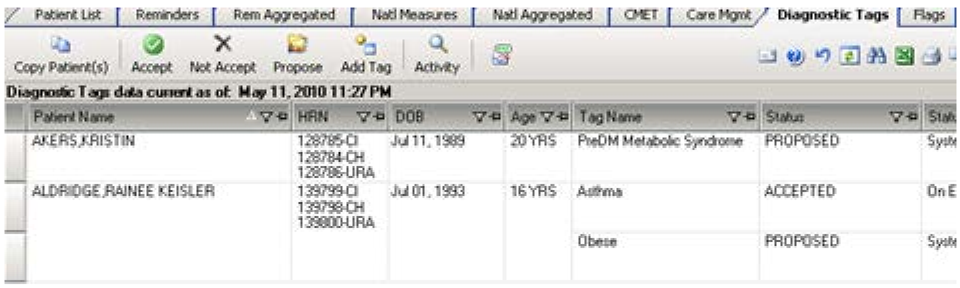


Figure 10-1: Sample Diagnostic Tags Tab

Tags that are identified through iCare's execution of the pre-defined tag criteria will start with an initial tag status of PROPOSED. From there you have several options including "Accepting" a tag or "Not Accepting" the validity of a tag for any patient. These statuses are editable from within this tab.

10.1 Diagnostic Tags Tab Layout

The following table provides information about the columns.

Column	Meaning
Patient Name	Required field that will link to the Patient Record if you double-click the name.
HRN	Patient's Health Record Number.
DOB	Patient's Date of Birth.
Age	Patient's age.
Tag Name	The name of the tag for the patient.
Status	ACCEPTED: means the patient is a member of specified formal case management registers with status of Active, Decease, Transient, Non IHS, Lost to Follow Up, or Noncompliant. PROPOSED: means the patient has Status Un-reviewed or Inactive in the register. NO LONGER VALID: means the RPMS data no longer supports the tag.
Status Change Reason	The reason the status changed can be: System Generated (system), RPMS Data No Longer Supports Tab (system), Patient Data Does Not Support Acceptance (user), Manually Designated (user), Other (user - with required comment field), on Existing RPMS Register (system).
Status Comment	The text of any comments entered about the status change (used with the Other status change reason).

Column	Meaning
Last Updated	The date the content of the panel was last updated by a manual (user) repopulate, by an auto-repopulate, or the panel created date, if the panel has never been repopulated.
Last Updated By	The name of the user who either created or last repopulated the panel (in certain cases, it will contain SYSTEM UPDATE).

There is hover help for the Tag Name cell that shows the name of the tag.

Double-click any record to go the Diagnostic Tags tab of the Patient Record window.

You can find information about all of the tags in the Diagnostic Tag Glossary (select Help | Diagnostic Tag Glossary).

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

10.2 Diagnostic Tags Toolbar

The toolbar shows the date/time for which the data is effective.

iCare will classify tags into one of five statuses: proposed (pending) (P), accepted (A), not accepted (NA), No longer valid (NLV) and Superseded (S). Those tags with a classification of NA will not display.

Section 12.2 provides information about the buttons on the right side of the toolbar.

10.2.1 Copy Patient(s)

This action copies the patients information to the clipboard.

Select one or more patients and then do one of the following:

- Click the Copy Patient(s) 

 button
- Select Diagnostic Tags | Copy Patient(s)
- Use the keyboard combination Ctrl+C

You must go to another panel view (for a different patient panel) and paste the patient's information.

10.2.2 Change Status

You use the Accept, Not Accept, and Proposed buttons to change the Status on an existing record (or select Care Mgmt | Main to select a status to change). Section 9.2.2.3 provides information about using these buttons.

10.2.3 Add Tag

Select a patient to which you want to add a tag and then click the Add Tag 

button (or select Diagnostic Tags | Add Tag) to display the Add Diagnostic Tag dialog. This is a manual add that allows a provider to manually assign one or more of the diagnosis tags to patients that did not meet the tag's criteria for being proposed automatically.

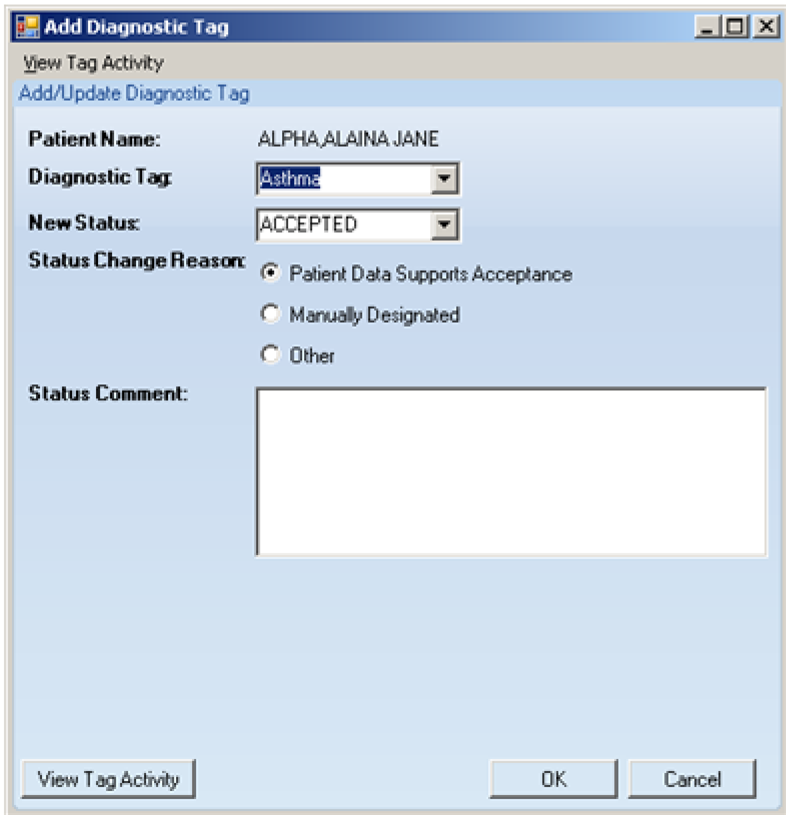


Figure 10-2: Add Diagnostic Tag dialog

This dialog shows information about the patient named in the Patient Name field (the one you selected).

When you have completed the dialog, click OK to add the information to the Diagnostic Tags tab on the Panel View. (Otherwise, click Cancel.)

10.2.3.1 Tag Activity

You can view existing tag activity about the patient by clicking the View Tag Activity button. The Diagnostic Tag Activity pop-up displays. Section 10.2.4 provides more information about this pop-up.

10.2.3.2 Fields on Add Diagnosis Tag Dialog

All fields are required.

Patient Name: the name of the patient to which to add tag information (application populated).

Diagnostic Tag: the name of diagnostic tag to add for the patient. Select an option from the drop-down list to populate this field.

New Status: the status of the tag being added.

ACCEPTED: this option allows you to “Accept” a proposed tag to provide an affirmation of its validity for a given patient.

NOT ACCEPT: this option allows you to disapprove or “Not Accept” a diagnostic tag that has been proposed for a patient.

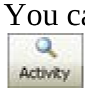
PROPOSED: this option allows you to change the status of a diagnosis tag back to “Proposed” so that further review can take place.

Reason: click the appropriate reason for adding the tag.

- Patient Data Supports Acceptance - use this when the patient data does support the tag.
- Manually Designated - use this when you want to manually change the tag status.
- Other - use this when the other reasons do not fit.

Status Comment: type the reason for the change in this Free Text field. This feature provides a rich audit history for reasons for providers’ decisions to accept or not accept proposed tag assignments.

10.2.4 Activity

You can view existing tag activity about the selected patient by clicking the Activity


button on the Panel View toolbar (or by selecting Diagnostic Tags | Activity). The RPMS iCare - Diagnostic Tag Activity pop-up displays. This is a view-only pop-up. Multiple people can enter the tags, so this pop-up shows all of the activity.

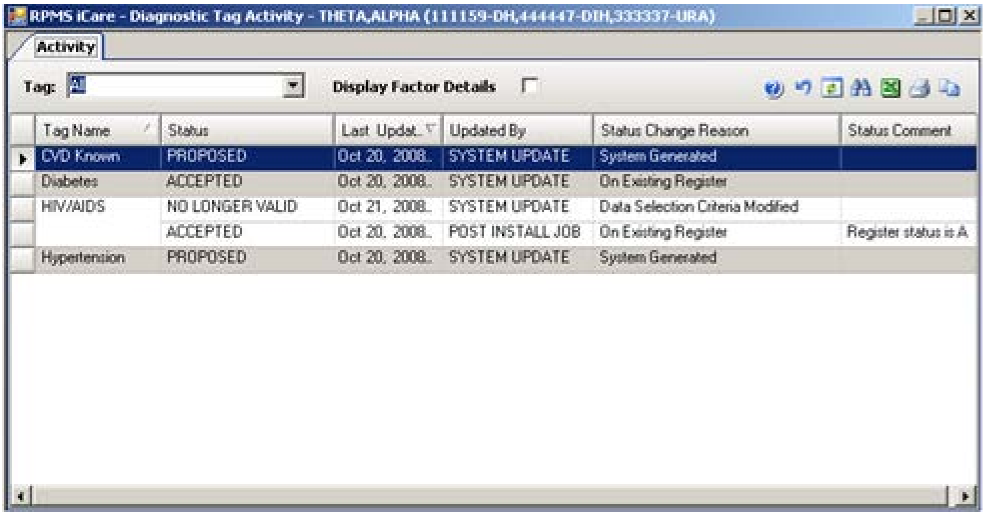


Figure 10-3: Sample Diagnostic Tag Activity Pop-up

Section 12.2 provides information about the buttons on the right side of the toolbar.

Click the Glossary  button to display the Diagnostic Tag Glossary.

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

You can view various tags by selecting from the drop-down list for the Tag field.

If you check the "Display Factor Details" check box, the following columns will display: Factor, Date, Item, Value. This allows you to view additional details about the tags. The default view is unchecked. You must dismiss the pop-up.

10.2.5 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the background jobs  button
- Select File | Background Jobs

This action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information this window.

10.3 Diagnostic Tags Tab Menu Options

The options on the File menu for the Diagnostic Tags tab are the same as those on the File menu for the Patient List tab.

The options on the Tools menus for the Diagnostic Tags tab are the same as those on the Tools menu for the Reminders tab.

The Diagnostic Tags menu have options that operate like the action buttons on the toolbar. Section 10.2 provides more information about the buttons.

11.0 Flags Tab

The Flags tab of the Panel View displays the flags for the patients in the open panel.

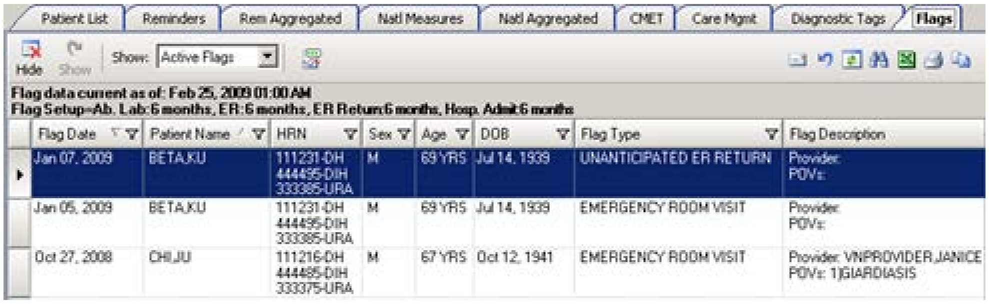


Figure 11-1: Sample Flags tab

The Flags tab displays the flag type shown in the Show field.

You can change the default flag display by changing the flag settings under User Preferences.

Double-click any record on this tab to go to the Flags tab of the Patient Record window.

11.1.1 Flags Tab Layout

The default display has the flag listed alphabetically by flag date (most recent first), by patient name, and then by flag type. No duplicate values are displayed in the first column. This means if a particular date has more than one flag, the date will be displayed only on the first row.

The iCare application will display an initial list of flags at first login only for the timeframe that is defined in the User Preferences. Likewise, you can change the flag view to display modified flag types and/or timeframes if you change the User Preferences. After changing the flag settings in User Preferences, refresh the flag view.

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

The following table provides information about the columns.

Column	Meaning
Flag Date	The date the flag became active, e.g., the date of the hospital admission.
Patient Name	This is a required field and will link to the patient’s Patient Record if you double-click the name.
HRN	Patient’s Health Record Number.
Sex	Either F (for Female) or M (for Male)

Column	Meaning
Age	Patient's age.
DOB	Patient's Date of Birth.
Flag Type	This can be Abnormal Lab Values, ER Visit, Unanticipated ER Return Visit, Hospital Visit.
Flag Description	A brief description of the event that caused the trigger.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.

The Flag Type column contains various flag types, as defined in the following table:

Flag Type	Meaning
Abnormal Lab Values Alert	This flag type informs the user when a patient has abnormal lab values within a user-defined timeframe, based on the Kernel Alerts component. The Abnormal Lab Values alerts, generated from the RPMS Laboratory application, reside in the Kernel Alerts component. If the ALV alert is closed by the provider in Kernel Alerts, it will no longer display in iCare, regardless of the Flag Display Timeframe selected by the user in the User Preferences.
ER Visit	This flag type informs the user when a patient has an emergency room visit within a user-defined timeframe. This flag is generated directly by iCare. ER visits (clinic code 30) is the trigger for this flag.
Unanticipated ER Return Visit	This flag type informs the user when a patient has an emergency room visit designated as "unanticipated" within a user-defined timeframe. This flag is generated directly by iCare. ER visits (clinic code 30) with Visit Type "Unscheduled Revisit" is the trigger for this flag.
Hospital Admission	This flag type informs the user when a patient has a hospital visit within a user-defined timeframe. This flag is generated directly by iCare. Any visit with service category H where the discharge date is not the same day as the admission date is the trigger for this flag.

11.1.2 Flags Tab Toolbar

The text above the grid shows the flag set-up information and how current the data is.

11.1.2.1 Show Field

What flags are displayed on this window is determined by the option selected on the Show field. Your choices are:

- Active Flags: Active is defined as a flag that has not expired and has not been hidden by the users.

- Hidden Flags: Those flags that you specified to be hidden, using the Hide button.
- All Flags: All flags, hidden as well as active.

11.1.2.2 Hide

You can hide a highlighted row in the Flag List grid by doing any of the following:

- Clicking the Hide  button
- Selecting File | Flags | Hide
- Selecting the Hide option on the context menu
- Pressing the F3 key on your keyboard

You can view the hidden flags by selecting the Hidden Flags option on the Show field.

11.1.2.3 Show

If you need to cause a hidden flag to re-appear in the current view, select it from the list on the Hidden Flags option (from Show field) and do any of the following:

- Click the Show  button
- Select File | Flags | Show
- Select the Show option on the context menu
- Press the F4 key on your keyboard

11.1.2.4 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the Background Jobs  button
- Select File | Background Jobs

This action accesses the RPMS iCare - Background Jobs window. Section 12.8 provides information this window.

11.1.3 Flags Tab Menu Options

The options on File and Tools menus are the same those on the Patient List tab. Section 3.3 provides more information about these menus.

The Flags menu is only available when the Flags tab is selected. The Hide and Show options work like the Hide and Show action buttons. The Refresh option refreshes the flags display, to show the most recent changes.

12.0 iCare Features Used by Panel View

The following provides information about using the iCare features for the Panel View window.

12.1 User Preferences

This section focuses on the user preferences that are used by the Panel View window.

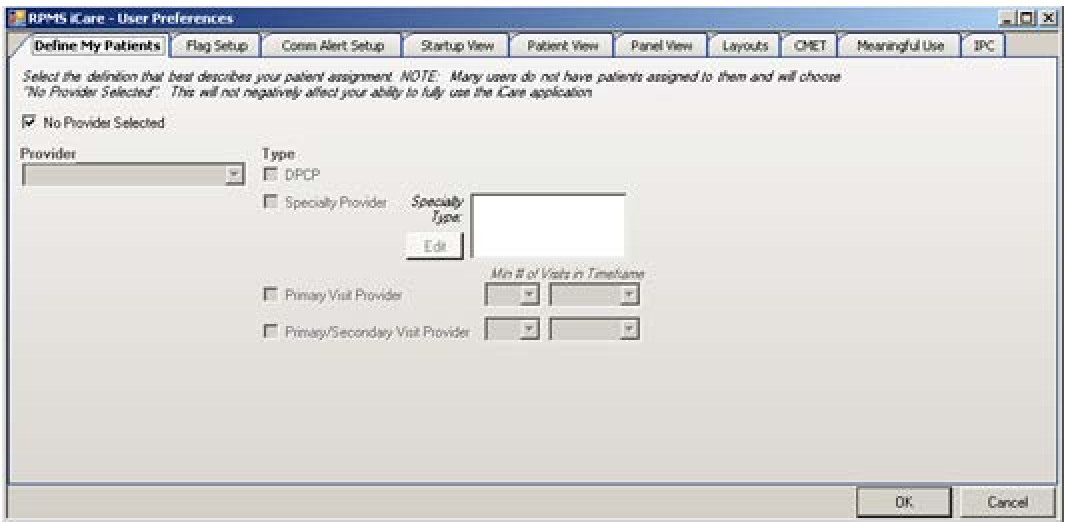


Figure 12-1: Sample User Preferences window

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.)

12.1.1 Startup View Tab

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

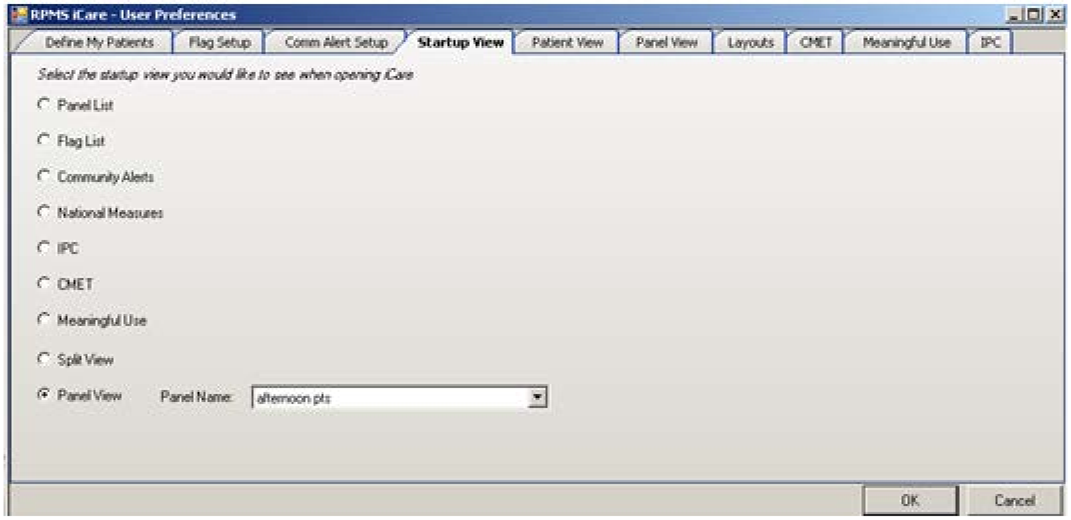


Figure 12-2: Sample Startup View tab on User Preferences

Select the Panel View radio button if you want the Panel View with the selected panel name to be the first window to display when you access the iCare application.

12.1.2 Panel View Tab

Use the Panel View tab to establish what Panel View tab to use when opening the Panel View window.

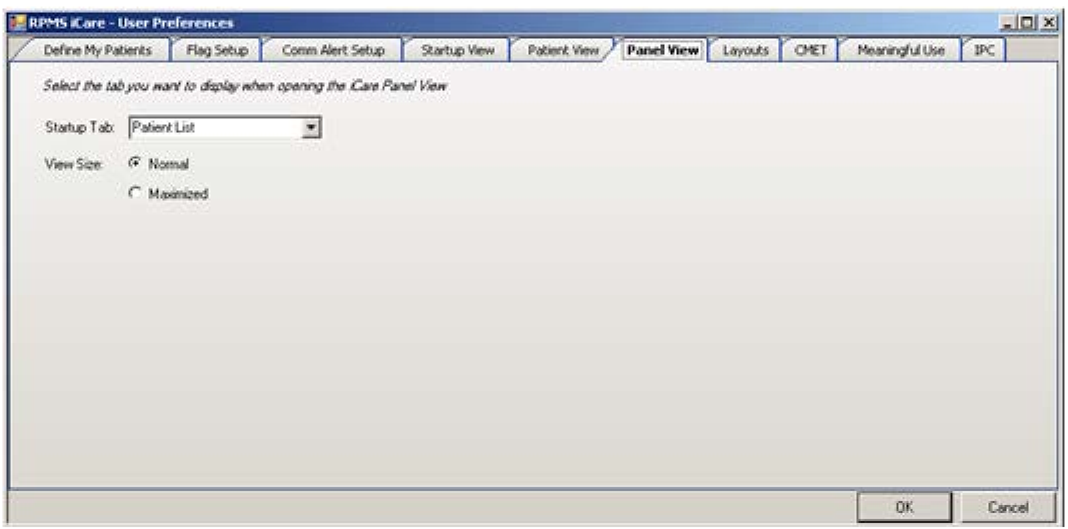


Figure 12-3: Sample Panel View tab

In addition, use the View Size field to established the size of the window. The maximized selection will display the application on your monitor full sized.

12.1.3 CMET Tab

The CMET tab of User Preferences determines the Events user preferences for the CMET tab on the Panel View window.

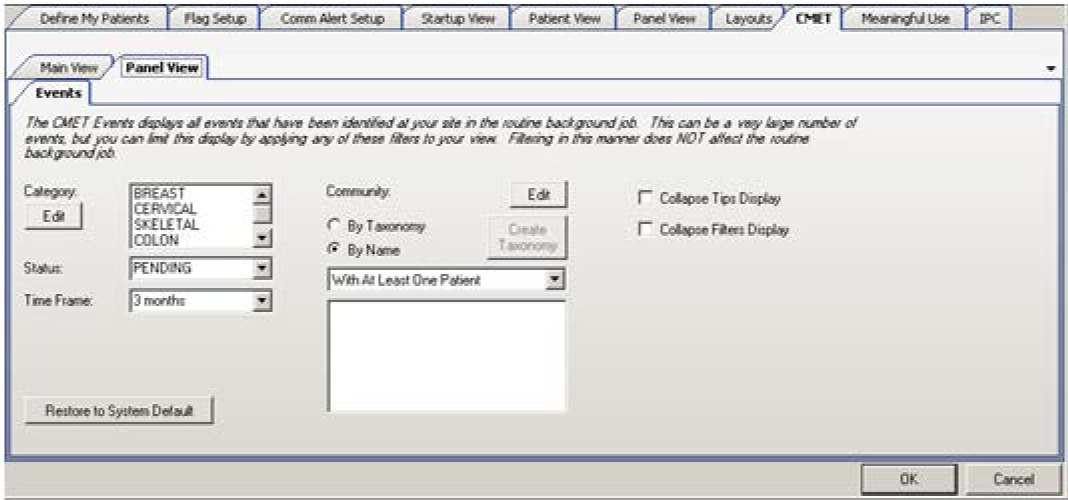


Figure 12-4: Panel View tab features

The Events sub-tab displays all events that have been identified at your site in the routine background job. This can be a very large number of events, but you can limit this display by applying filters to your view. Filtering in this manner does NOT affect the routine background job.

Use the Events sub-tab to establish the filters for the current events on the CMET tab of the Panel View window.

After you change the settings on the Events sub-tab, click OK to save your changes (otherwise, click Cancel).

Return to System Default Button

Click the “Return to System Default” button to return to the system default settings for the Events sub-tab.

Collapse Tips Display

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

Collapse Filters Display

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

12.1.3.1 Status

Use the Status field to filter the displayed events to those having a particular status on the Events sub-tab. Click the drop-down list and select an option to populate the Status field.

12.1.3.2 Time Frame

Use the Time Frame field to filter the displayed events to those in a particular time frame. Click the drop-down list and select an option to populate the Time Frame field.

12.1.3.3 Category

Use the Category field to filter the displayed events to those in one or more categories.

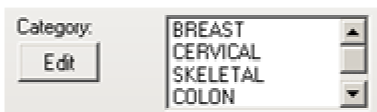


Figure 12-5: Category group box

To populate the Category field, click the Edit button to access the Add/Remove Events Category dialog. The default Category field contains Breast, Cervical, Colon, Skeletal, STI.

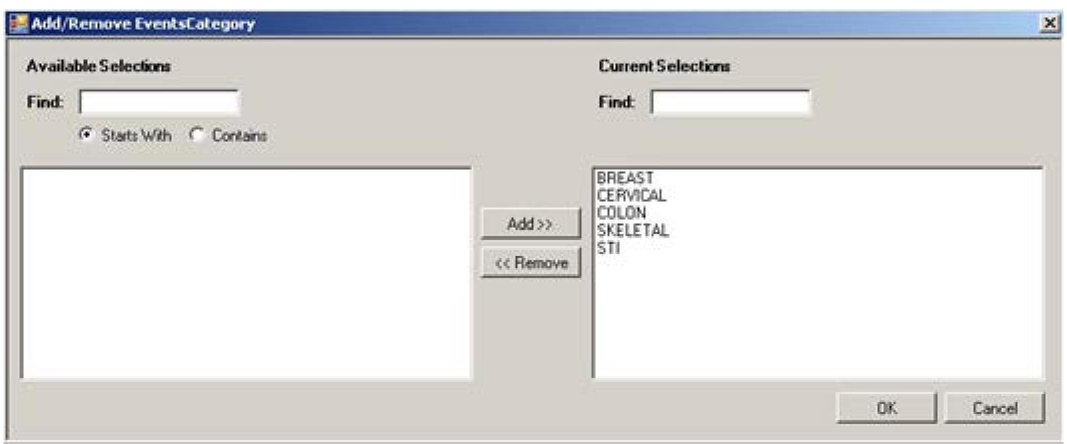


Figure 12-6: Sample Add/Remove Events Category dialog

Available Selections

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

To move a highlighted category name from the Available Selections list to the Current Selections list, click Add.

Current Selections

Use the Find field to locate a particular event category by entering a few characters of the event category name. The application will scroll the list to the first found name.

To move a highlighted category name from the Current Selections list to the Available Selections list, click Remove.

The options in the Current Selections field determines the default Categories for the Events sub-tab on the CMET tab for the Panel View window.

12.1.3.4 Community

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

Figure 12-7: Community filter fields

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

By Name Radio Button

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

Use the field below the radio buttons to filter the communities in the lower field. The options are (1) With At Least One Patient or (2) All.

Use the Edit button to add one or more names to the lower field. Click the Edit button to access the Add/Remove Communities dialog.

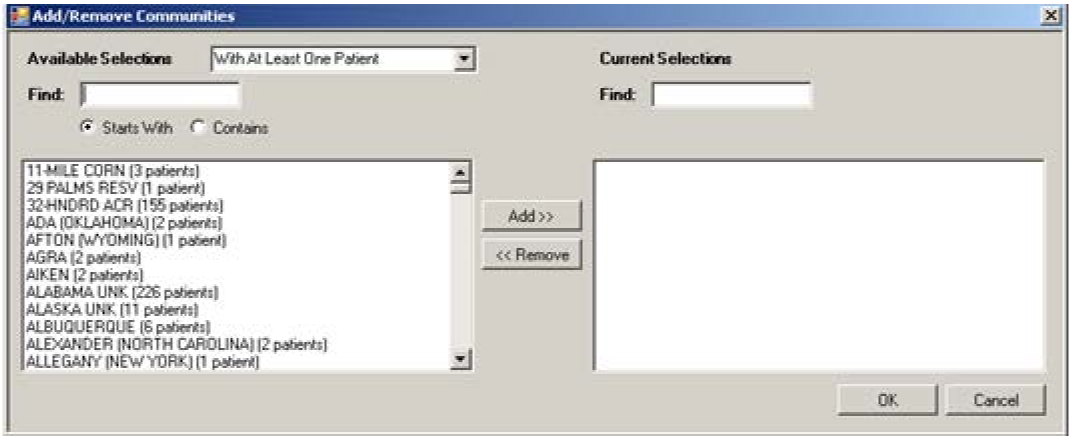


Figure 12-8: Sample Add/Remove Communities dialog

Available Selections

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

Available Selections List

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

To move a highlighted community name from the Available Selections list to the Current Selections list, click Add.

Current Selections

Use the Find field to locate a particular community by entering a few characters of the community name. The application will scroll the list to the first found name.

To move a highlighted community name from the Current Selections list to the Available Selections list, click Remove.

The options in the Current Selections field determines the default communities for the Events sub-tab on the CMET tab for the Panel View window.

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

If the lower field contains more than one community, this activates the Create Taxonomy button. To use the Create Taxonomy button, the user must have the iCare Editor (BQIZCMED) or iCare Package Manager (BQIZMGR) security key.

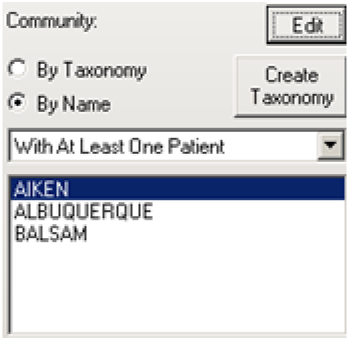


Figure 12-9: Community group box with Create Taxonomy active

Use the Create Taxonomy button to save the listed communities as a Community taxonomy. Click the Create Taxonomy button to display the Create/Update Community Taxonomy dialog.

Figure 12-10: Create/Update Community Taxonomy dialog

Use the Community Taxonomy Name field (required) to specify a taxonomy name for the list of communities. Use the Brief Description and Extended Description fields (not required) to add other information about the taxonomy. When the dialog is complete, click OK (otherwise, click Cancel).

If the user uses a duplicate taxonomy name, iCare will provide a warning that the user might be overwriting the user’s taxonomy. The user can overwrite (Yes), save as another name (No), or cancel (to return to the Create/Update Community Taxonomy dialog).

If you use a unique taxonomy name, the application displays the “Confirm save to RPMS” information message that asks: The data will be saved to the RPMS server. Do you want to continue? Click Yes to save the data to the RPMS server (otherwise click No). If you use Yes, the application displays the Community Taxonomy Create message stating that the community taxonomy was successfully created and that the panel definition will be updated to reflect the use of a taxonomy rather than a list of communities. (Click OK to dismiss the message). After you click OK, the list of names will be replaced with the name of the taxonomy (and the By Taxonomy radio button will be selected).

By Taxonomy Radio Button

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

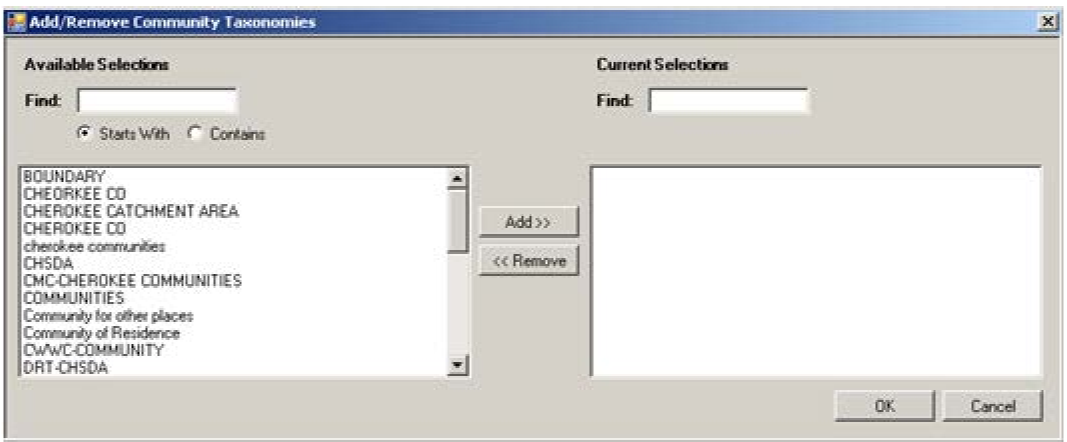


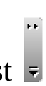
Figure 12-11: Sample Add/Remove Community Taxonomies dialog

When the Add/Remove Community Taxonomies dialog is complete, click OK. The options in the Current Selections group box determine the default Community by Taxonomy for the Events on the CMET sub-tab of the Panel View window. (Otherwise click Cancel.)

12.2 Buttons on Right Side of Window

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

Figure 12-12: 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.

12.2.1 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.

12.2.2 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.

12.2.3 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.

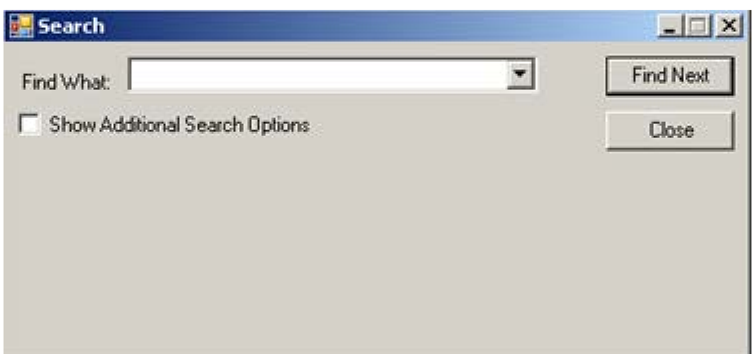


Figure 12-13: Search dialog

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

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

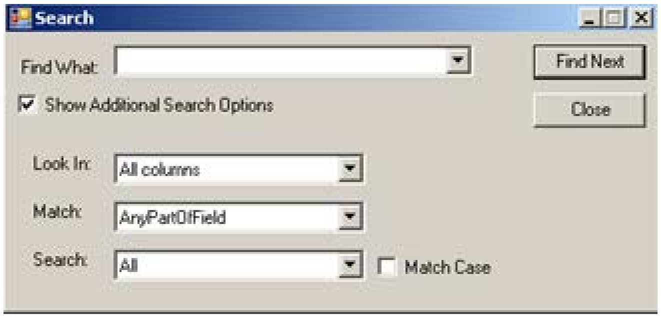


Figure 12-14: Search dialog with additional search options

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” checkbox, that will cause the search to match the case of the text in the Find What field.

12.2.3.1 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.

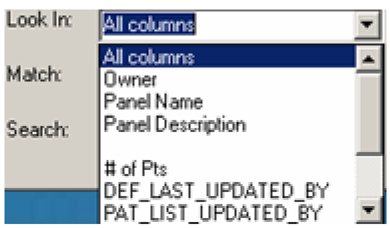


Figure 12-15: Sample drop-down list options for Look In field

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.

12.2.3.2 Match Field

Click the drop-down list for the Match field to view the options for that field.

Figure 12-16: Sample drop-down list options for Match field

The highlighted option determines what part of the Find What field will be matched in the search.

12.2.3.3 Search Field

Click the drop-down list for the Search field to view the options for that field.

Figure 12-17: Sample drop-down list options for Search field

The highlighted option determines the direction of the search.

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

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 12-18: Sample Datagrid Search Results

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

12.2.4 Export to Excel

You can export the information in the 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.

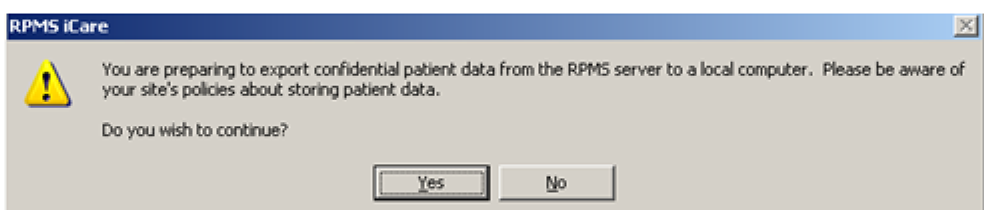


Figure 12-19: Warning message about exporting the patient data

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.

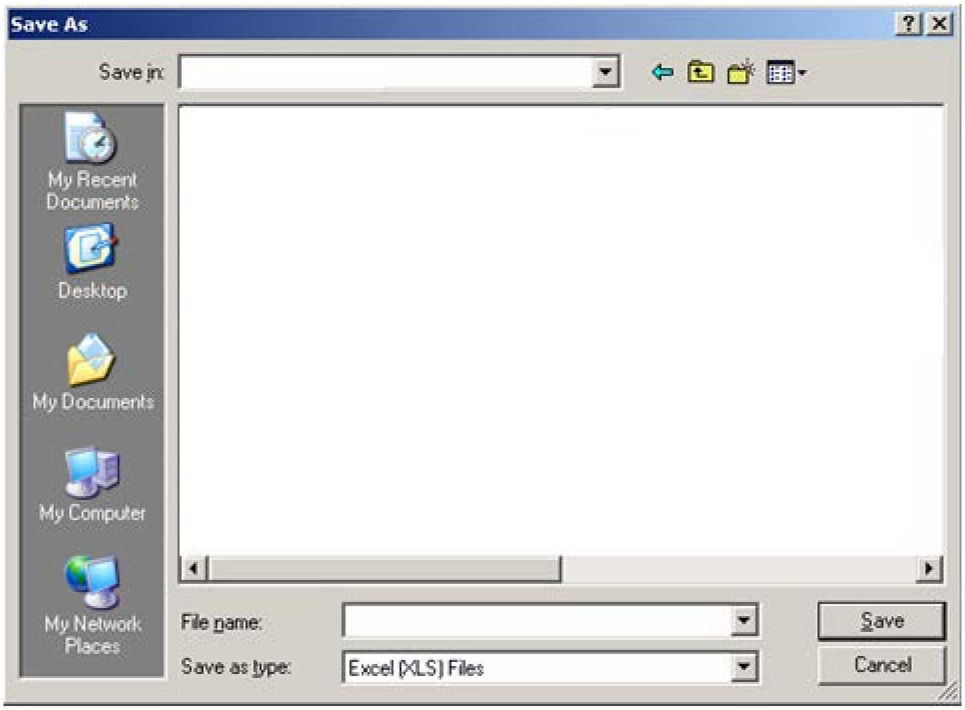


Figure 12-20: Sample Save As dialog

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.

12.2.5 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.

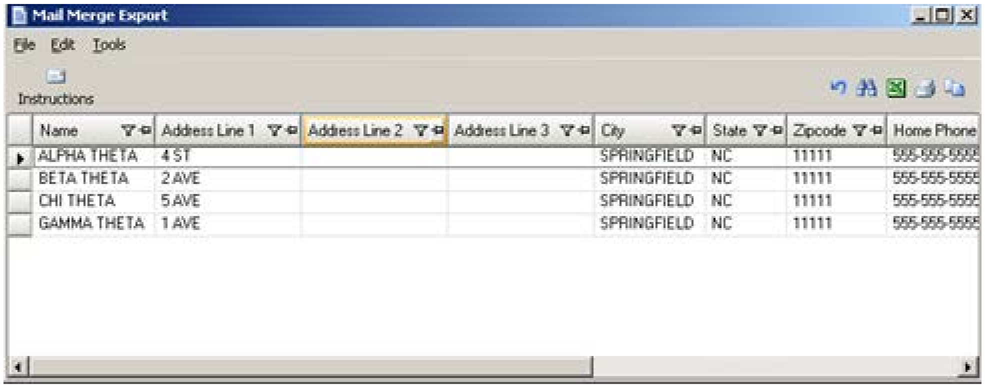


Figure 12-21: Sample Mail Merge Export Dialog

Section 12.2 provides information about using the buttons on the right side of the toolbar.

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

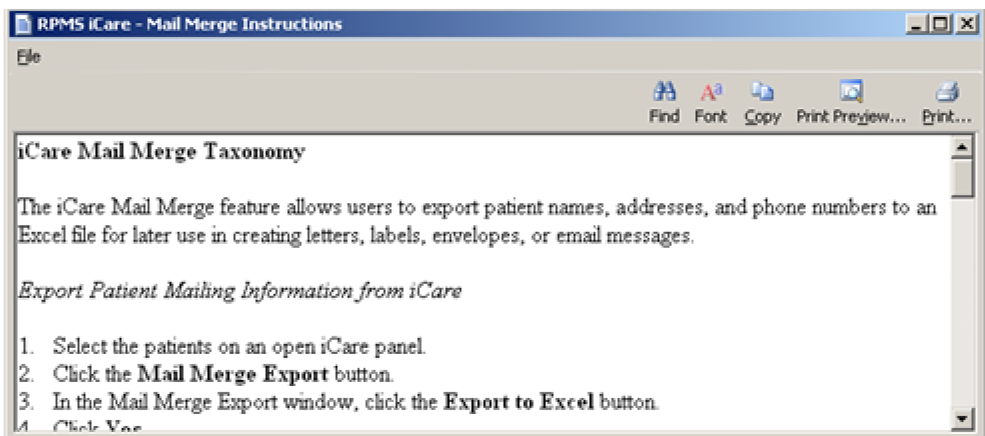


Figure 12-22: Mail Merge Instructions pop-up

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

Section 12.7 provides information about the File menu and buttons on the pop-up.

12.2.6 Glossary

Click the Glossary button (or select the particular glossary from the Help menu) 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.

12.3 Free Text Fields

Free Text fields are those fields that you can type information into; those types of fields do not have a drop-down list from which to select an option to populate them.

An example of the Free Text field is the Panel Name field (when creating/editing a panel definition).

There is a context menu to aid in editing the text.

Figure 12-23: Context menu to aid in editing text

These options operate just like those in any Windows application.

Undo: removes the last edit action.

Cut: removes the selected text from its current position and places it on the clipboard.

Copy: copies the selected text and places it on the clipboard (the text is NOT removed).

Paste: copies the contents of the clipboard and places it in the field at the current cursor position.

Delete: removes the selected text from its current position.

Select All: highlights all of the text in the current field.

12.4 Print Preview

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

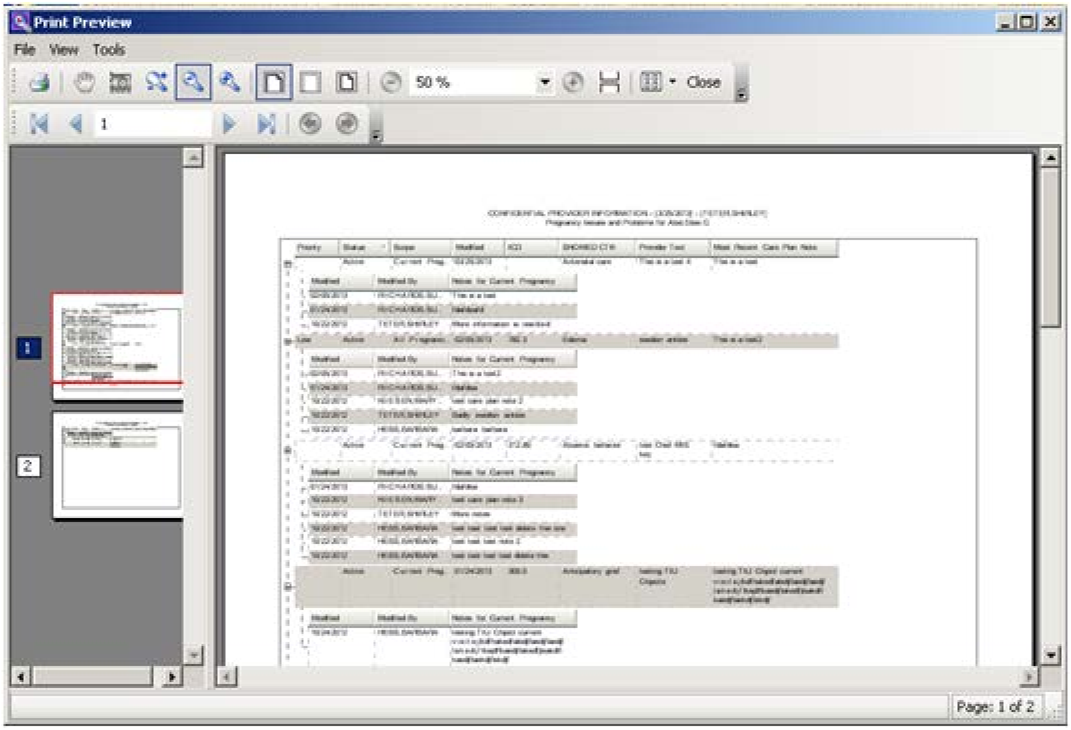
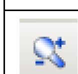
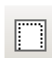
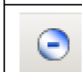


Figure 12-24: Sample Print Preview dialog

The Print Preview window contains two panels, where the left panel displays the pages in the document and the right panel displays a larger version of the page selected in the left panel.

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

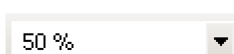
Button	Description
	Used to output the contents of the document. Also available by selecting Print option on the File menu.
	Used to move the red rectangular box on the selected page in the left panel. As you move the Hand Tool, this changes the display in the right panel. This is used to view information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

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

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

Figure 12-25: 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.

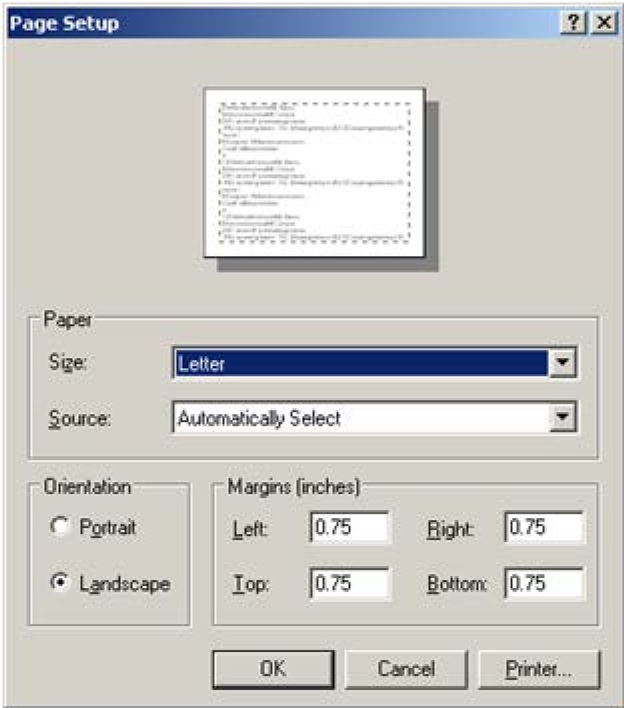


Figure 12-26: Sample Page Setup dialog

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.)

12.5 Layout

After you click Layout on the Panel View window, the application displays the layout of the columns in the particular panel.

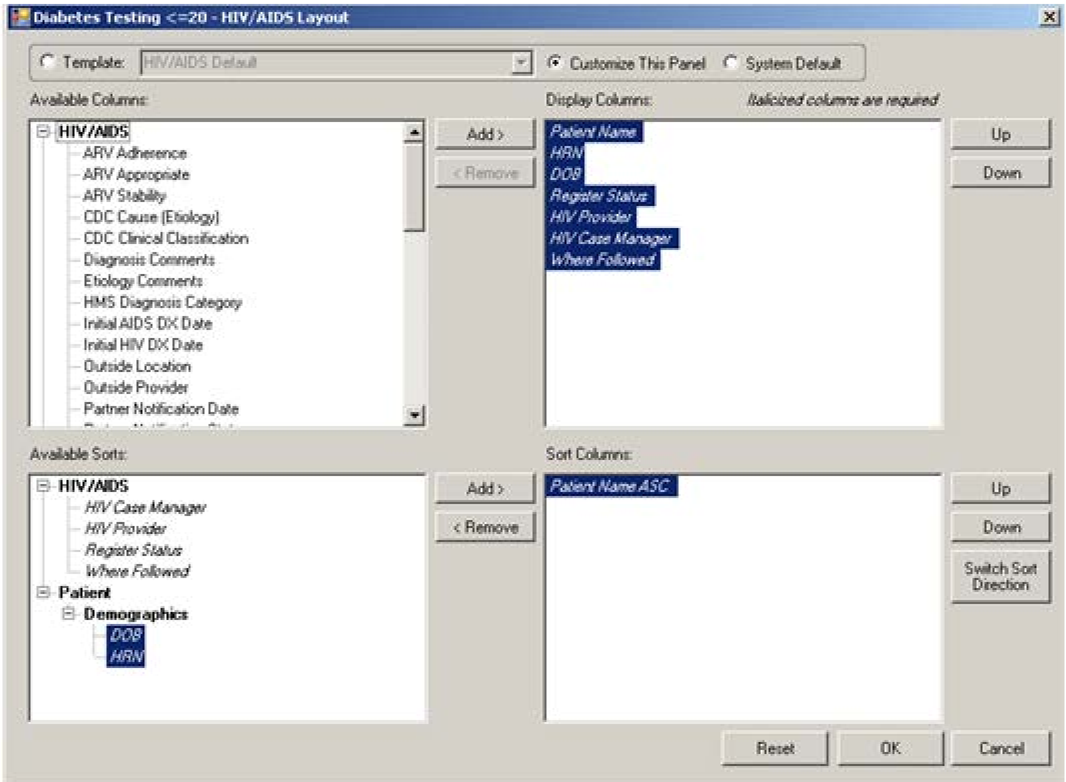


Figure 12-27: Sample layout window for the particular panel

12.5.1 Template Group Box

When you first access the layout dialog, the application displays the template for the particular patient list.

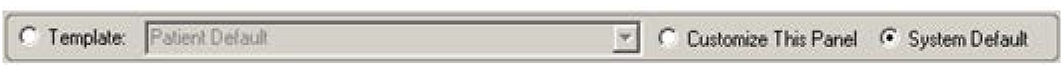


Figure 12-28: Template group box for Panel Definition

- If you leave the System Default radio button selected, then the application displays the system default columns. In this case, the Add and Remove buttons are not active (and you cannot change anything) on the layout dialog.
- If you select the Customized radio button, the application lets you change the columns (the Add and Remove buttons become active, for example). Anything you change on the layout dialog will be used for the Customized template.
- You can name the customized template by selecting the Template radio button. This action causes the field with the drop-down list to become active (and the Customized and System Default radio buttons are not selected). Once you add a name, it is added to the Template name drop-down list. Later, you can choose which template you want to use during an iCare session.

12.5.2 Display and Available Columns

Use the Display Columns to determine what columns you want to display for the particular panel.

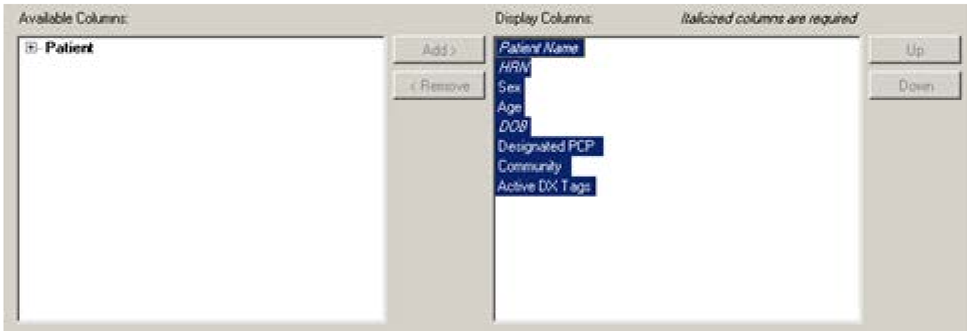


Figure 12-29: Sample Display and Available columns

The listing in the Display Columns area shows the columns that will be displayed for your population. 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.

12.5.3 Columns to Sort

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

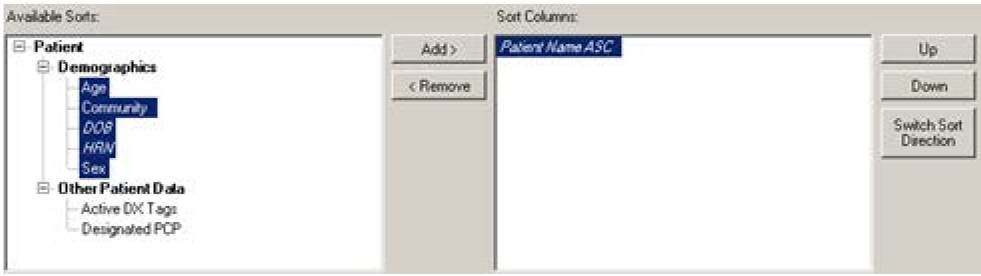


Figure 12-30: Sample Available Sorts and Sort Columns area

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.

12.5.4 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.

12.5.5 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.

12.6 iCare Taxonomy Editor Function

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

You access the iCare Taxonomy View/Edit dialog by either selecting Tools | Taxonomy Maintenance | View/Edit Taxonomy Entries.

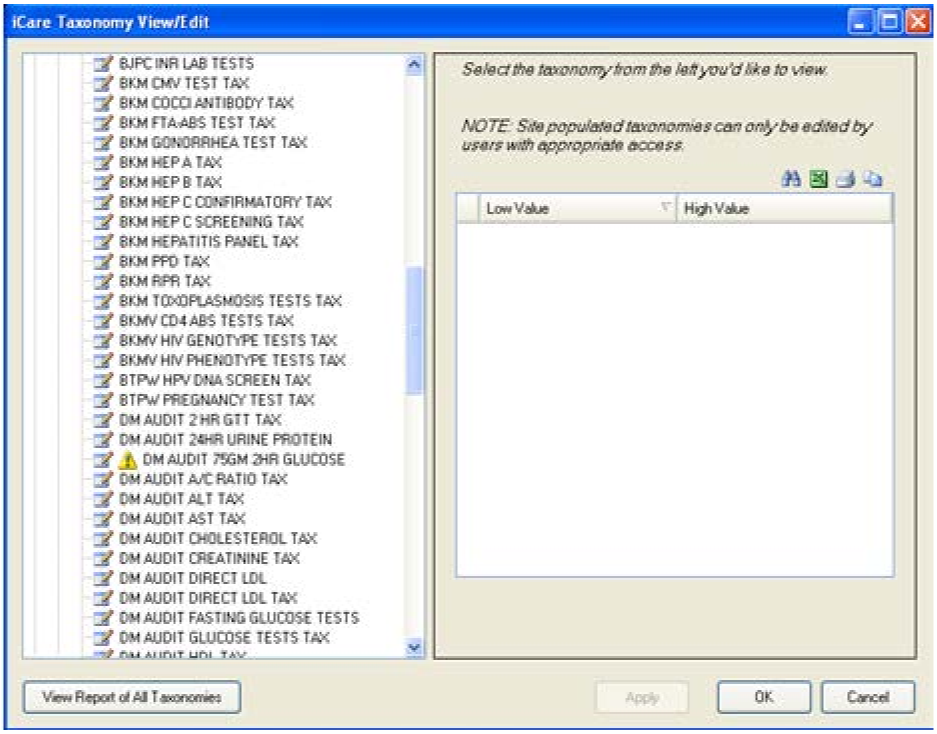


Figure 12-31: Sample iCare Taxonomy View/Edit dialog

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

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

In general, select the taxonomy from the list in the left group box that you want to view. This causes the Add and Remove buttons to appear in the right group box of the dialog.

Please note that not all taxonomies can be edited. iCare will display a message on the view/edit dialog when this condition exists. Site populated taxonomies can only be edited by users with appropriate access.

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

12.6.1 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.

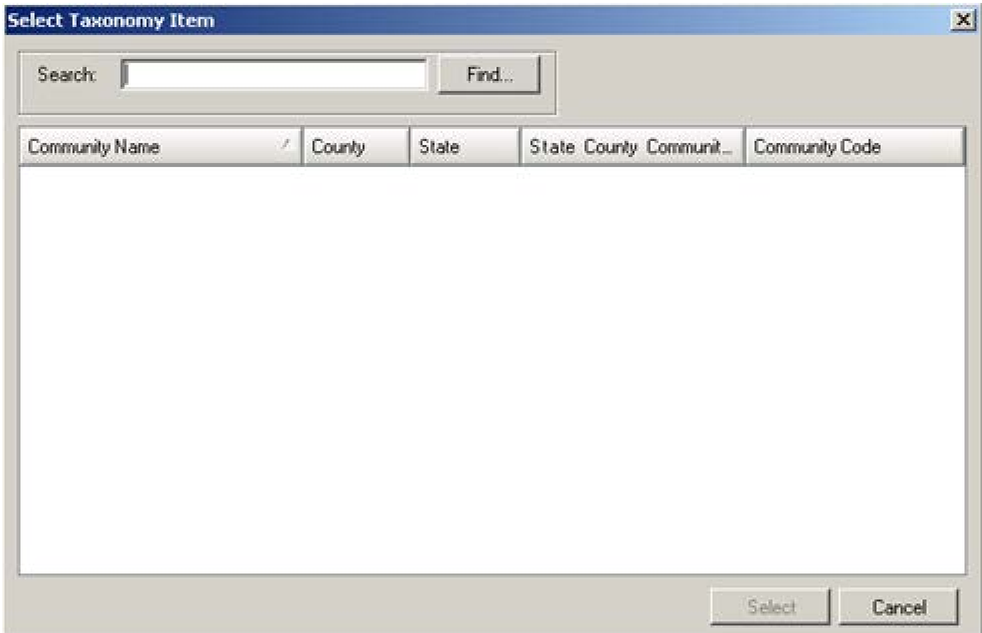


Figure 12-32: Select Taxonomy Item dialog

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

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

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

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

12.6.2 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.

12.6.3 View Report of All Taxonomies Button

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

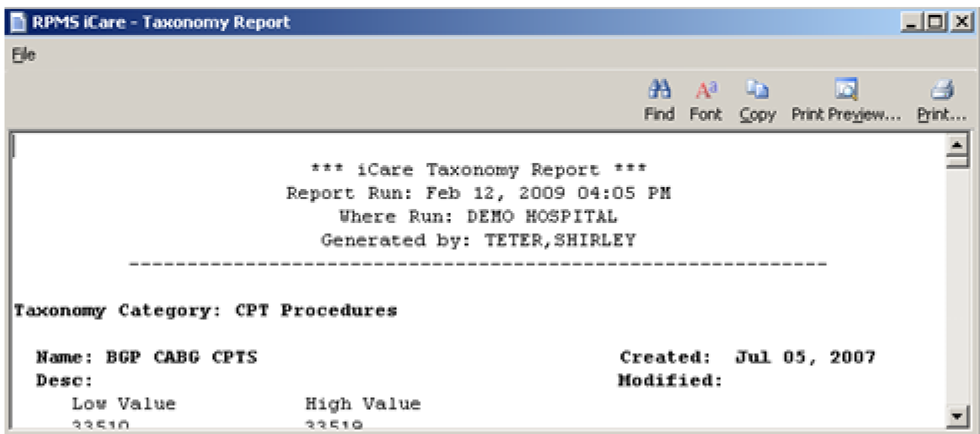


Figure 12-33: Taxonomy Report

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

Section 12.7 provides information about using the File menu and buttons on the pop-up.

12.7 Pop-up Functionality

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

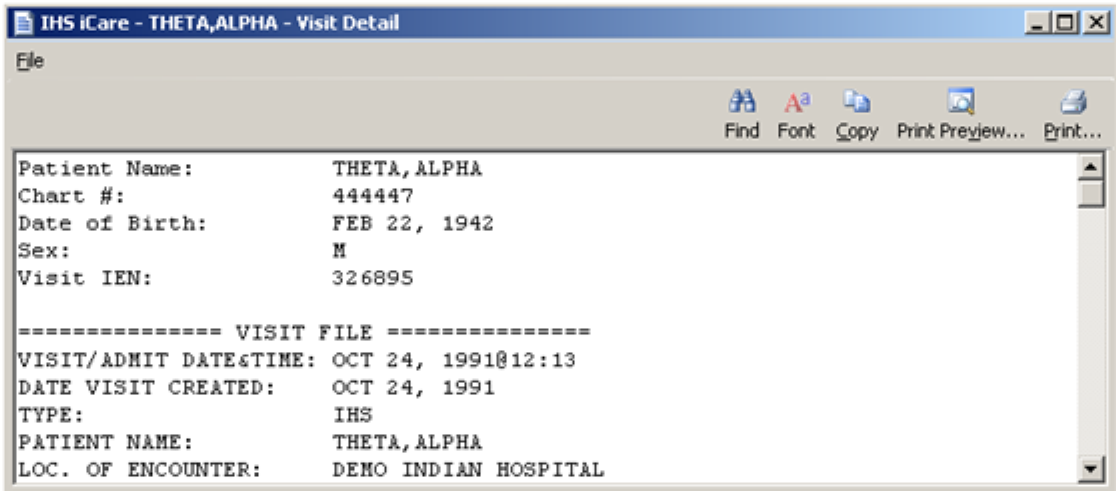


Figure 12-34: Sample Visit Detail Pop-up

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.

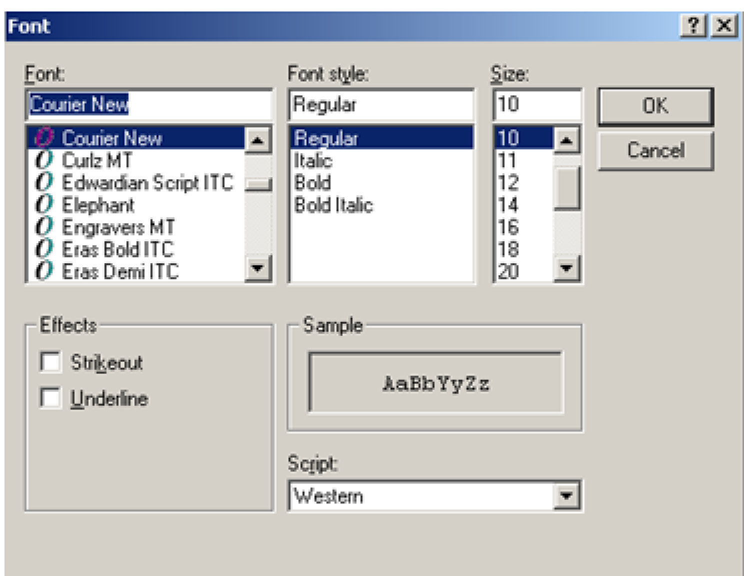


Figure 12-35: Font Dialog

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

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

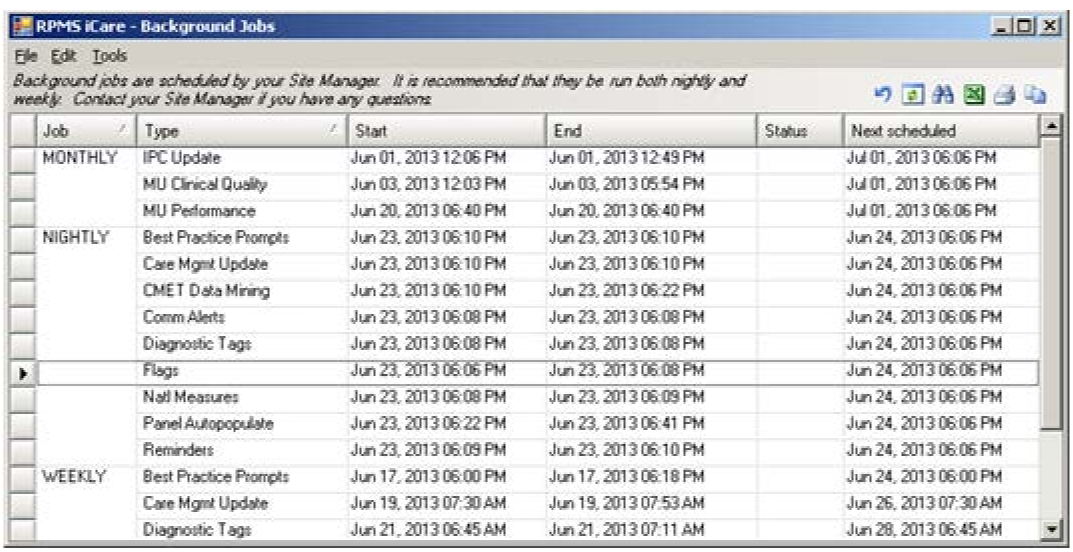
Click OK to apply your changes to the text in the current pop-up. These changes are only effective for the current view of the pop-up. (Otherwise, click Cancel.)

- Click the Copy button to copy the selected text to the Windows clipboard.
- Click the Print Preview button to view the Print Preview dialog. You can print the contents of the pop-up from this dialog.
- Click the Print button to display a print dialog where you specify the printer to output the contents of the pop-up, the page range, and number of copies.

The File menu contains the print actions (like the Print Preview and Print buttons), the Page Setup function, the find and copy functions, as well as a Close function (dismisses the pop-up).

12.8 Background Jobs

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



Job	Type	Start	End	Status	Next scheduled
MONTHLY	IPC Update	Jun 01, 2013 12:06 PM	Jun 01, 2013 12:49 PM		Jul 01, 2013 06:06 PM
	MU Clinical Quality	Jun 03, 2013 12:03 PM	Jun 03, 2013 05:54 PM		Jul 01, 2013 06:06 PM
	MU Performance	Jun 20, 2013 06:40 PM	Jun 20, 2013 06:40 PM		Jul 01, 2013 06:06 PM
NIGHTLY	Best Practice Prompts	Jun 23, 2013 06:10 PM	Jun 23, 2013 06:10 PM		Jun 24, 2013 06:06 PM
	Care Mgmt Update	Jun 23, 2013 06:10 PM	Jun 23, 2013 06:10 PM		Jun 24, 2013 06:06 PM
	CMET Data Mining	Jun 23, 2013 06:10 PM	Jun 23, 2013 06:22 PM		Jun 24, 2013 06:06 PM
	Comm Alerts	Jun 23, 2013 06:08 PM	Jun 23, 2013 06:08 PM		Jun 24, 2013 06:06 PM
	Diagnostic Tags	Jun 23, 2013 06:08 PM	Jun 23, 2013 06:08 PM		Jun 24, 2013 06:06 PM
	Flags	Jun 23, 2013 06:06 PM	Jun 23, 2013 06:08 PM		Jun 24, 2013 06:06 PM
	Natl Measures	Jun 23, 2013 06:08 PM	Jun 23, 2013 06:09 PM		Jun 24, 2013 06:06 PM
	Panel Autopopulate	Jun 23, 2013 06:22 PM	Jun 23, 2013 06:41 PM		Jun 24, 2013 06:06 PM
	Reminders	Jun 23, 2013 06:09 PM	Jun 23, 2013 06:10 PM		Jun 24, 2013 06:06 PM
WEEKLY	Best Practice Prompts	Jun 17, 2013 06:00 PM	Jun 17, 2013 06:18 PM		Jun 24, 2013 06:00 PM
	Care Mgmt Update	Jun 19, 2013 07:30 AM	Jun 19, 2013 07:53 AM		Jun 26, 2013 07:30 AM
	Diagnostic Tags	Jun 21, 2013 06:45 AM	Jun 21, 2013 07:11 AM		Jun 28, 2013 06:45 AM

Figure 12-36: Sample Background Jobs pop-up

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

The File menu has the following options:

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

Print Preview: This option displays the Print Preview dialog.

Print: This option outputs the 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.

12.9 CMET Worksheet

Use the Open CMET Worksheet button to access the CMET Worksheet for a selected event on the particular sub-tab of the CMET window. You find this button on the Tracked Events and Follow-up Events sub-tab on the CMET main, CMET tab on the Panel View, and the Tracked Events and Follow-up Events of the CMET tab on the Patient Record window.

Use this worksheet to process the Care Management Events that you have chosen to track. Enter data related to: Findings, Follow-up and Patient Notification. The Site parameters “Due By” default dates set by the CMET Package Manager can also be edited in this screen.

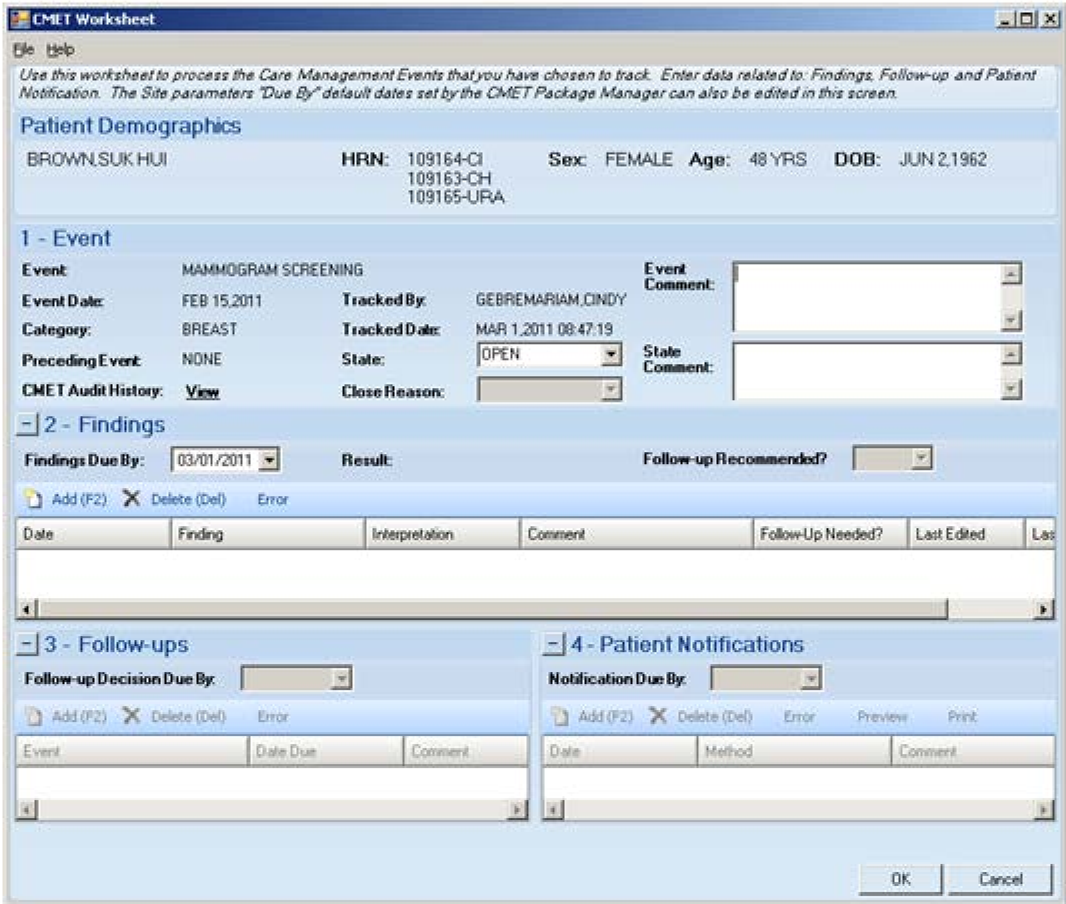


Figure 12-37: Sample CMET Worksheet

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

- When you use OK, there are two cases.

  Case 1: if all of the steps are not complete, the application updates the data on the Tracked Events sub-tab.

  Cases 2: if all of the steps are complete, the application will display the Close Event information message that states: The event is eligible for closing as all four steps are completed. Do you want to close the event now? Use Yes to close the event. Use No to not close the event.

  If you choose to close the event (by selecting Yes on the Close Event message), the application displays the RPMS iCare Reason for Closing dialog. Here you select a reason for closing the event and provide a comment (required) about the closing. Click OK to save the reason for closing (otherwise, click Cancel).

If you use OK on the Reason for Closing dialog, the application displays the "Save to RPMS?" dialog that states: You have data changes pending. Do you want to save to RPMS now? Click Yes to save the changes to RPMS. Click No to not save the changes.

- When you use Cancel, there are two cases:

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

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

12.9.1 Patient Demographics Group Box

The Patient Demographics group box shows the patient's name, HRN, Sex, Age, and Date of Birth (DOB).

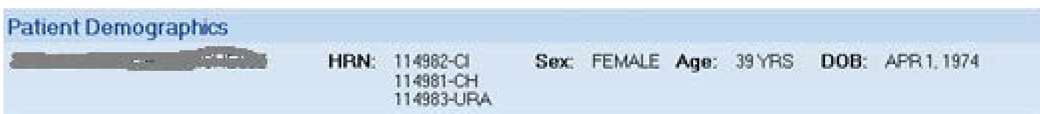


Figure 12-38: Sample Patient Demographic group box

> **Note**: The HRN will display as the HRN number followed by the facility code.

12.9.2 1 - Event Group Box

The data in the 1 – Event group box provides information about the event and allows you to change the State of the event as well as provide comments about the Event and/or State. In addition, you can view the audit history of the event.

Figure 12-39: Sample Event group box

State: This field defines the State of the event.

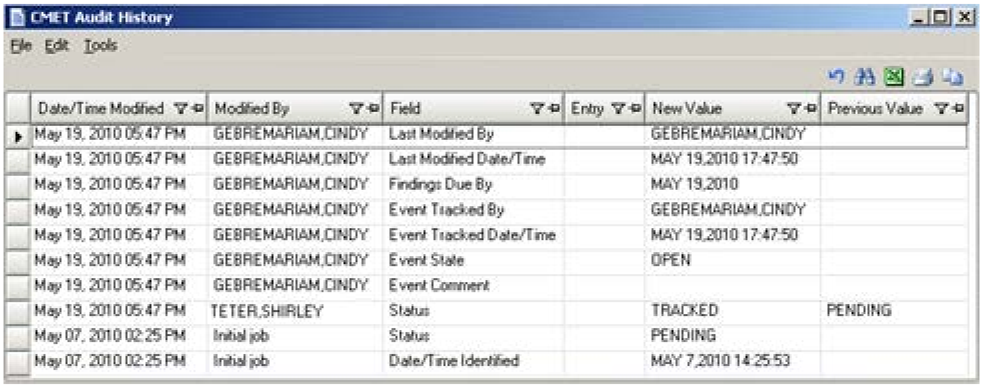
If you populate the State field with Closed, then the Close Reason field becomes active where you select an option from the drop-down list that describes why you are closing the event.

When an Event has a State of Closed, the other group boxes (Findings, Follow-up, Patient Notifications) will be inactive.

Event Comment: Use this Free Text field to add comments about the Event.

State Comment: Use this Free Text field to add comments about the State.

CMET Audit History: If you click the View label, the application will display the CMET Audit History pop-up.



Date/Time Modified	Modified By	Field	Entry	New Value	Previous Value
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Last Modified By		GEBREMARIAM,CINDY	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Last Modified Date/Time		MAY 19,2010 17:47:50	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Findings Due By		MAY 19,2010	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Event Tracked By		GEBREMARIAM,CINDY	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Event Tracked Date/Time		MAY 19,2010 17:47:50	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Event State		OPEN	
May 19, 2010 05:47 PM	GEBREMARIAM,CINDY	Event Comment			
May 19, 2010 05:47 PM	TETER,SHIRLEY	Status		TRACKED	PENDING
May 07, 2010 02:25 PM	Initial job	Status		PENDING	
May 07, 2010 02:25 PM	Initial job	Date/Time Identified		MAY 7,2010 14:25:53	

Figure 12-40: Sample CMET Audit History pop-up

Because multi-users work on the event, the audit history provides of a history of those activities. Section 12.7 provides information about using the controls on the pop-up.

State: This determines the state of the event, either Open or Closed.

If Closed is used, then the Close Reason field becomes active.

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

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

12.9.3 2 - Findings Group Box

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

Figure 12-41: Sample Findings group box

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

The Findings Due By, Result, and Follow-up Recommended? fields become populated when you use the Add button on the grid and save the record.

Findings Due By: This field displays the date the findings of this event were entered into CMET. If this date passes without an entry, a “tickler” (Feather icon) is generated.

Result: This field displays the date of the result. If this field contains an underlined date, click on the date to display the detail of the result. For example, below is the Radiology Case Number Detail pop-up. Section 12.7 provides information about using the controls on the pop-up.

Figure 12-42: Radiology Case Number Detail

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

12.9.3.1 Add Button

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

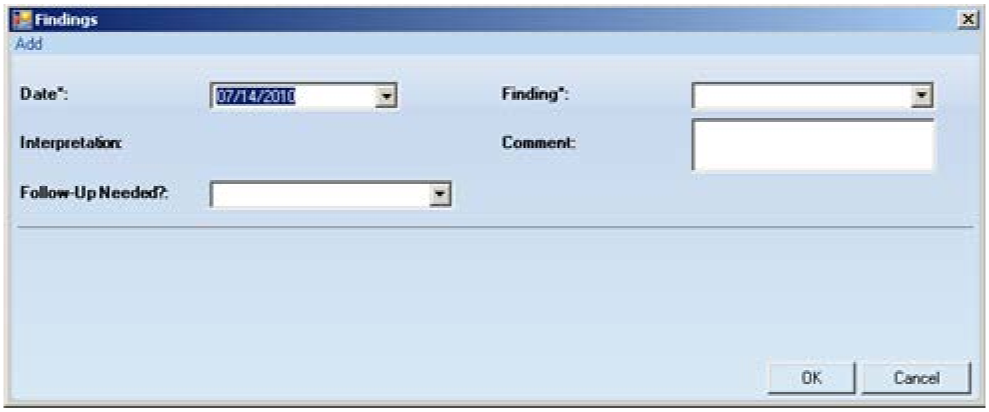


Figure 12-43: Findings dialog

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

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

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

Interpretation: The application populates this field, based on your selection in the Finding field.

Comment: Type the text of the comments about the Finding, if appropriate, in this [Free Text field](#).

Follow-up Needed: Use an option from the drop-down list: Yes or No.

Click OK to save your data on the Findings dialog. (Otherwise, click Cancel.)

After saving the data, the application populates the grid with the record and populates the Last Edited (current logon user) and Last Edited By (current date) columns.

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

12.9.3.2 Delete Button

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

If you select an event that is not eligible for the Delete function, the application displays the message: Unable to delete a previously saved entry. Please mark as ‘Entered in Error’ instead. Click OK to dismiss the message.

Select one or more eligible Findings records you want to delete and click the Delete button (or press the Delete button on your keyboard). The application displays the Delete Row information message, confirming the deletion. Click Yes to delete the selected records. (Otherwise, click No.)

12.9.3.3 Error Button

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

If you select a record that is not eligible for the Error function, the application displays the message: Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead. Click OK to dismiss the message.

Select one or more eligible Findings records and click the Error button. After using this function, the application places a strikethrough mark on the text of the record.

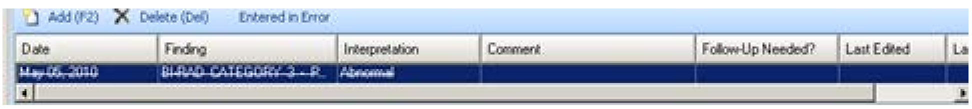


Figure 12-44: Sample Entered in Error marking

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

12.9.4 3 - Follow-ups Group Box

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

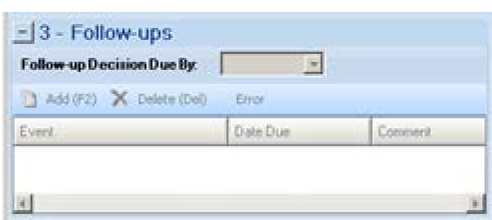


Figure 12-45: Follow-ups group box

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

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

Follow-up Decision Due By: select a date from the drop-down list that indicates when the follow-up decision should be made. Populating the field creates a tickler (feather icon) for the event. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters. You can populate this field with the date you want to take action on the event.

12.9.4.1 Add Button

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

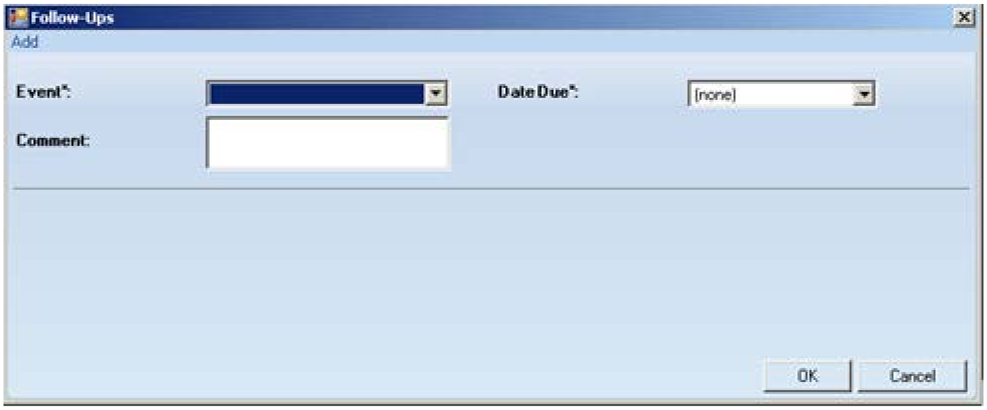


Figure 12-46: Sample Follow-Ups dialog

The required fields are those with the asterisk after their names.

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

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

Comment: use this Free Text field to add comments about the follow-up.

Click OK to save the data on the dialog (otherwise, click Cancel). After saving, the follow-up record will display in the 3 - Follow-ups group box on the CMET Worksheet.

12.9.4.2 Delete Button

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

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

12.9.4.3 Error Button

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

If you select a record that is not eligible for the Error button, the application displays the message: Unable to mark as 'Entered in Error' because the entry has not been saved in RPMS. Please delete the entry instead. Click OK to dismiss the message.

Select one or more eligible Follow-up records and click the Error button. After using this function, the application places a strikethrough mark on the text of the record.

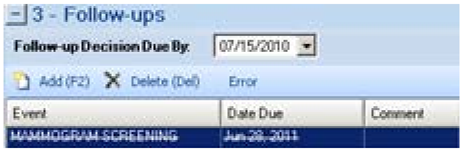


Figure 12-47: Sample of Follow-up record marked as entered in error

12.9.5 4 - Patient Notifications Group Box

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

Figure 12-48: Patient Notifications group box

The Patient Notification, the final step, makes the patient aware of both the results and the recommendations for follow-up. Multiple types of Patient Notifications can be entered for each Event.

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

You can minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the Follow-ups group box.

Notification Due By: enter the date to have your patient notified about the results and recommendations of the follow-up related to this event. If this date passes without an entry, a tickler (feather) icon will be generated. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters.

12.9.5.1 Add Button

If you do not have default clinics defined in user preferences, the application displays the following message: You must select default clinics in user preferences before being able to enter notes. Click OK to dismiss the message. Select Tools | User Preferences to access the RPMS iCare – User Preferences dialog. Go to the Patient View tab to enter the clinic codes.

Use the Add button to create a new Patient Notification record. Click the Add button (or press the F2 button on your keyboard) to access the Notifications dialog.

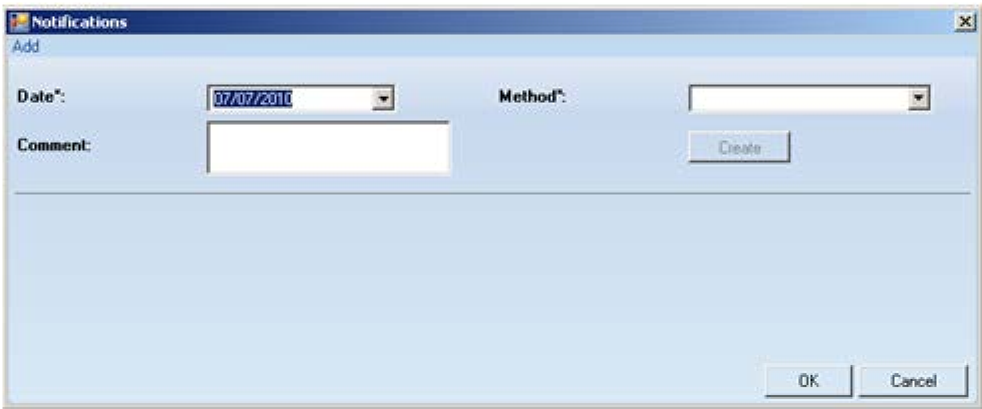


Figure 12-49: Sample initial Notifications dialog

The required fields are those with the asterisk after their names.

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

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

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

If you have an electronic signature on file, click the Create button to access the Add TIU Note dialog.

Comment: use this Free Text field to add any comments about the notification.

After completing this dialog, click OK to save the data (otherwise, click Cancel). After saving, the notification record will display in the 4 - Patient Notifications group box on the CMET Worksheet.

12.9.5.2 Delete Button

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

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

12.9.5.3 Error Button

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

If you select a record that is not eligible for the Error function, the application displays the message: Unable to mark as 'Entered in Error' because the entry has not been saved in RPMS. Please delete the entry instead. Click OK to dismiss the message.

Select one or more eligible Patient Notification records and then click the Error button. After using this function, the application places a strikethrough mark on the text of the record.

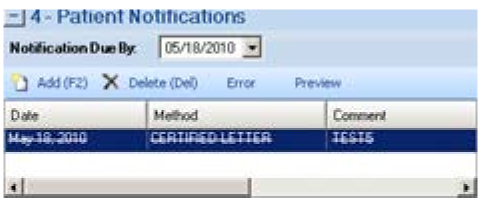


Figure 12-50: Sample Patient Notification record marked as entered in error

12.9.5.4 Preview

Use the Preview function to preview the letter associated with the selected Patient Notification record. This function only applies to records that are Letters or Certified Letters.

Select the record you want to previous and then click the Preview button. The application displays the Letter Preview pop-up.

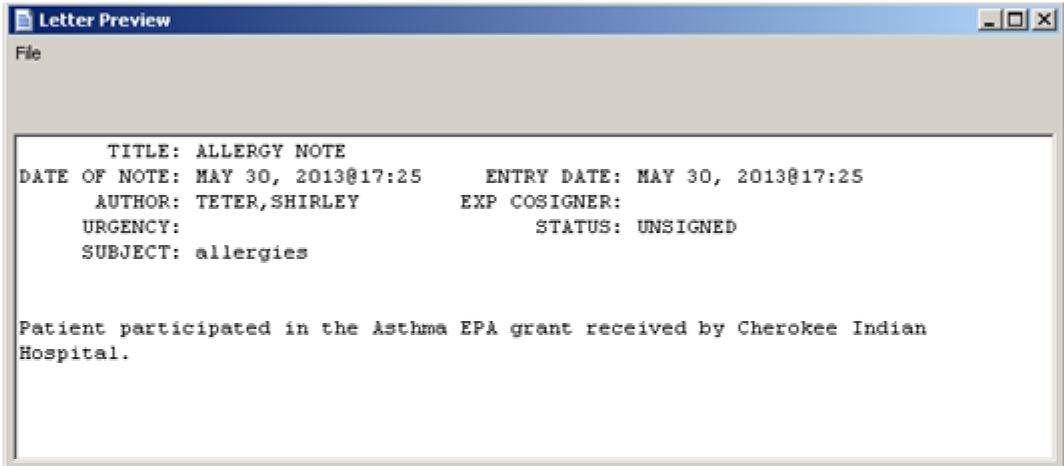


Figure 12-51: Sample Letter Preview pop-up

The File menu has one option: Close that closes the pop-up.

12.9.5.5 Print Button

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

12.10 CMET Batch Mammogram Screening Dialog

The batch process for mammogram screenings changes the events to have a Status of Tracked, the Event State of Closed, and the Close Reason of Event Complete.

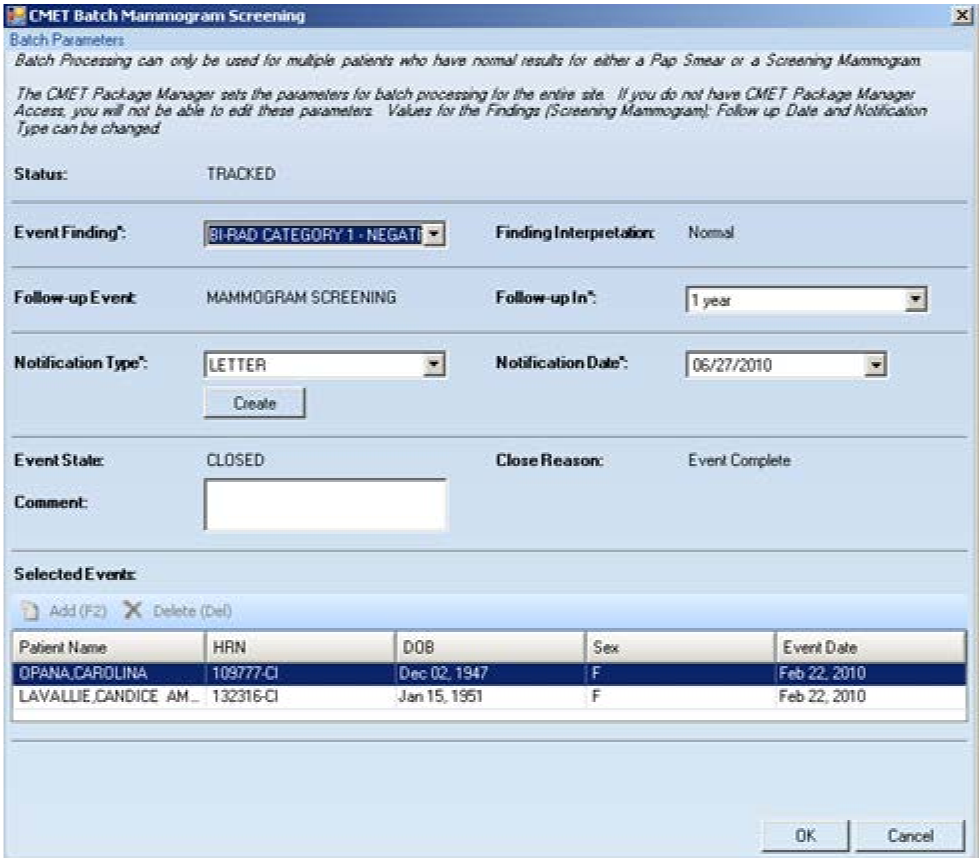


Figure 12-52: Sample CMET Batch Mammogram Screening dialog

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

12.10.1 Fields on Dialog

The required fields have the asterisk (*) following their names.

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

Event Finding: This indicates the event finding. The drop-down list contains the options to populate/change this field.

Finding Interpretation: This field provides the interpretation of the finding (view only).

Follow-up Event: This is the follow-up event (view only).

Follow-up In: This is the timeframe for the follow-up. The drop-down list contains the options to populate/change this field.

Notification Type: This is the type of patient notification for the event. Select an option from the drop-down list. The options on the drop-down list are defined by the application (sites cannot add values).

Create: the Create button is active when the Notification Type is Letter or Certified Letter. This function requires that you have an electronic signature on file. Click the Create button to access the Add New TIU Note - Batch Mode dialog. Section 12.12 provides for more information about this dialog.

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

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

Close Reason: This is the reason why the status is closed (view only).

Comment: Use this Free Text field to type the text of any comments pertaining to the mammogram screenings.

12.10.2 Selected Events Group Box

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

Figure 12-53: Sample Selected Events group box

12.11 CMET Batch Pap Smear Dialog

The batch process for pap smears changes the events to have a Status of Tracked, the Event State of Closed, and the Close Reason of Event Complete.

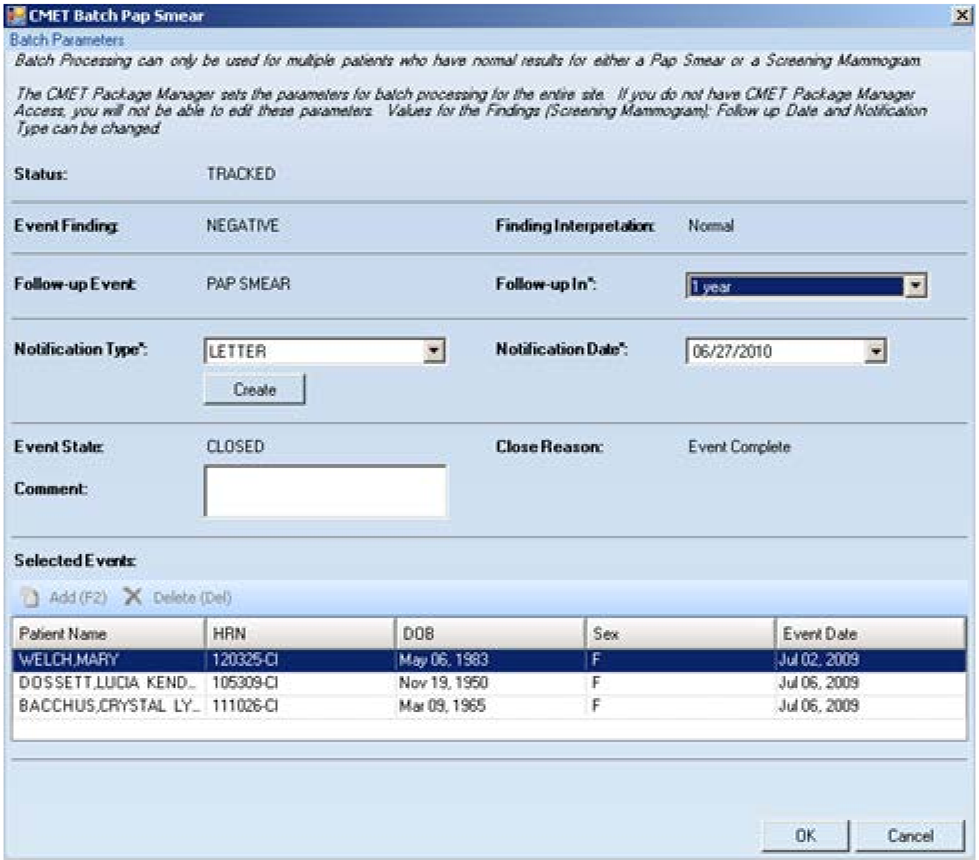


Figure 12-54: Sample Batch Pap Smear dialog

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

12.11.1 Fields on Dialog

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

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

Event Finding: This indicates the event finding (view only).

Finding Interpretation: This provides the interpretation of the finding (view only).

Follow-up Event: This displays the follow-up event (view only).

Follow-up In: This is the timeframe for the follow-up. The drop-down list contains the options to populate/change this field.

Notification Type: This is the type of patient notification for the event. Select an option from the drop-down list. The options on the drop-down list are defined by the application (sites cannot add values).

Create: the Create button is active when the Notification Type is Letter or Certified Letter. This function requires that you have an electronic signature on file. Click the Create button to access the Add New TIU Note - Batch Mode dialog. Section 12.12 provides for more information about this dialog.

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

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

Close Reason: This is the reason when the status is closed (view only).

Comment: Use this Free Text field to enter the text of any comments pertaining to the pap smear screenings.

12.11.2 Selected Events Group Box

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

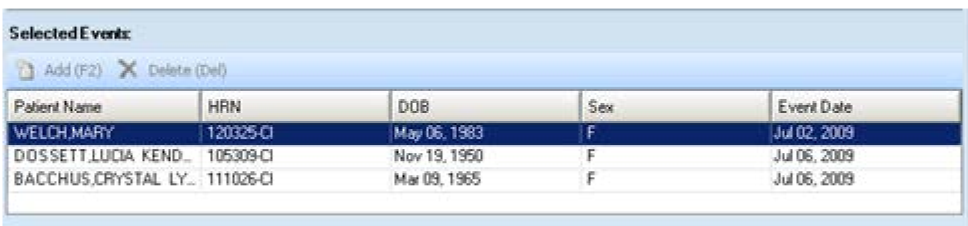


Figure 12-55: Sample Selected Events group box

12.12 Add TIU Note – Batch Mode

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

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

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

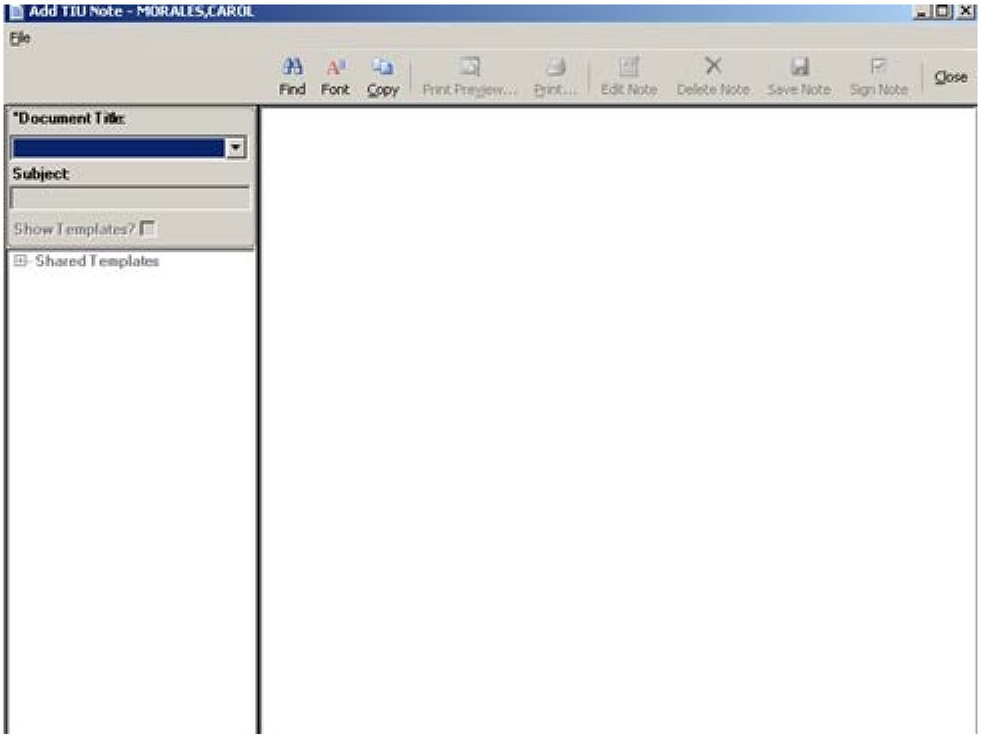


Figure 12-56: Sample Add TIU Note dialog

Both fields are required.

Document Title: select an option from the drop-down list to establish the title of the TIU note.

Subject: use this Free Text Field to enter the subject of the TIU note. This field becomes active after populating the Document Title field.

At this point, you can do one of the following: not use a template or use a template.

12.12.1 Note with No Template

When you do not want to use a template, and, after you populate the Document Title and Subject fields, you can type the text of the TIU note in Free Text area on the right side of the dialog.

When the text is complete, the following buttons are active: Find, Font, Copy, Save Note, Sign Note, Close. Section **Error! Reference source not found.** provides for more information.

12.12.1.1 Find Button

The Find button works like the Find button on the pop-up. Section 12.7 provides information about the pop-up window.

12.12.1.2 Font Button

The Font button works like the Font button on the pop-up. Section 12.7 provides information about the pop-up window.

12.12.1.3 Copy Button

The Copy button works like the Copy button on the pop-up. Section 12.7 provides information about the pop-up window.

12.12.1.4 Save Note Button

Use the Save Note button to save the current note. Below is an example of what happens after you click the Save Note button.

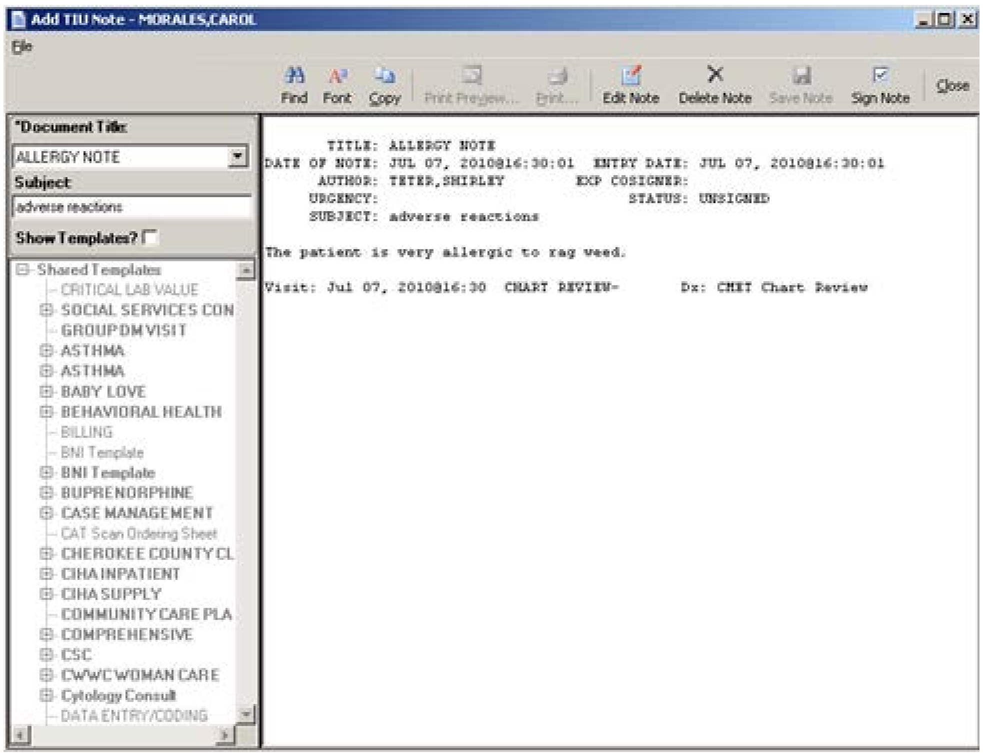


Figure 12-57: Sample Add TIU Note dialog with note information

12.12.1.5 Sign Note

Use the Sign Note button to electronically sign the selected unsigned TIU note. After clicking the Sign Note button (or selecting File | Sign Note), the application displays the Enter Electronic Signature dialog.

Figure 12-58: Enter Electronic Signature dialog

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

```
/es/ SHIRLEY TETER

Signed: 07/07/2010 18:09
Visit: Jul 07, 2010@18:08  CHART REVIEW-      Dx: CMET Chart Review
```

Figure 12-59: Sample electronic signature noted on text of TIU note

12.12.1.6 Close

Use the Close button to close the Add TIU Note (for patient) dialog. Click the Close button (or select File | Close) to close the dialog.

12.12.2 Note with Template

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

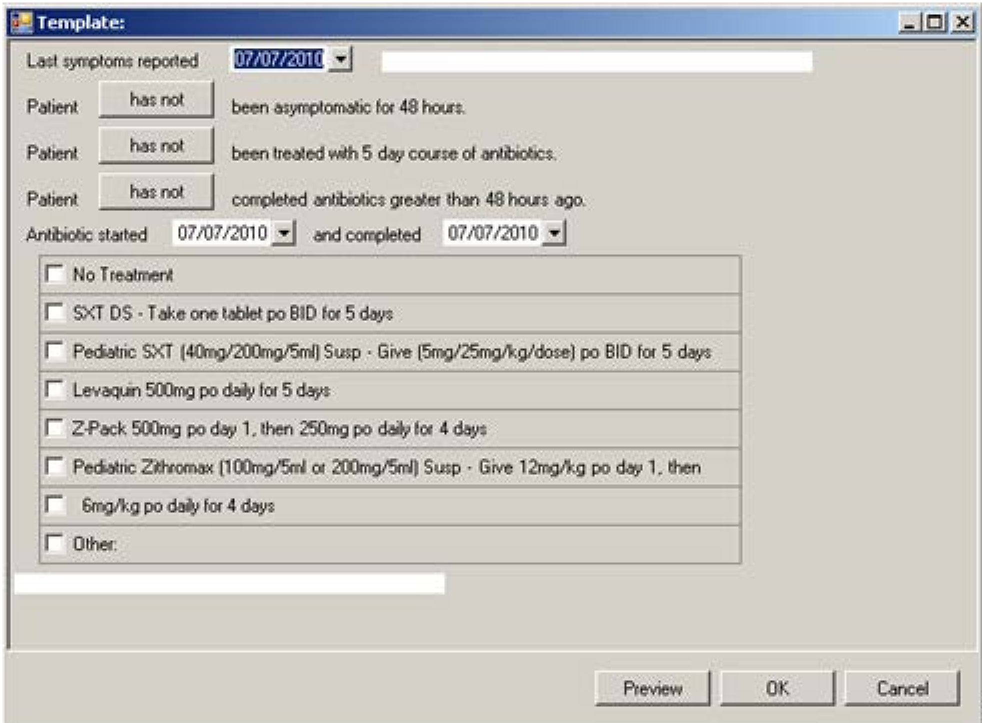


Figure 12-60: Sample Template

You can complete the template by using the Free Text fields, check boxes, date fields, etc. on the template. What you select/enter on the template determines the text of the TIU note.

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

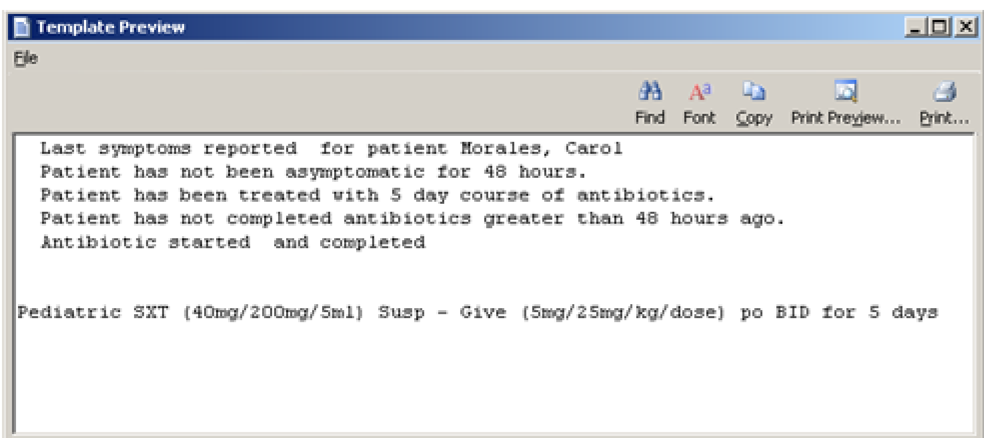


Figure 12-61: Sample Preview of the TIU note

What appears on the Template Preview pop-up determines what will be in the text of your TIU note. After you close (File | Close) the pop-up, you return to the Template window. Section 12.7 provides information about using the controls on the preview window.

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

12.12.2.1 Buttons on Add TIU Note Dialog

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

- Line lengths should be <80 columns (characters), otherwise, the line spacing on the finished TIU note will not format correctly.
- The Find, Font, Copy, Print Preview, and Print buttons on this dialog work like those on the pop-up window. Section 12.7 provides information about using the controls on the pop-up.
- You should adjust the font size before saving the TIU note, if needed.

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

Save Note: use this button to save the current note. After clicking this button, the note is saved and the Delete Note and Edit Note buttons become active.

Sign Note: use this button to electronically sign the selected unsigned TIU note. After clicking the Sign Note button (or selecting File | Sign Note), the application displays the Enter Electronic Signature dialog.

Figure 12-62: Enter Electronic Signature dialog

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

Figure 12-63: Sample electronic signature noted on text of TIU note

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

Figure 12-64: Example of text of the note

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

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

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

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

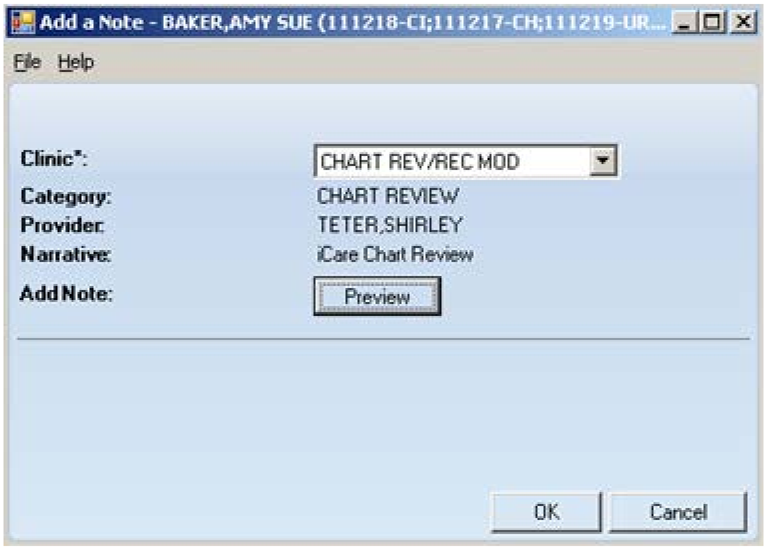


Figure 12-65: Sample Add a Note dialog with Preview button

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

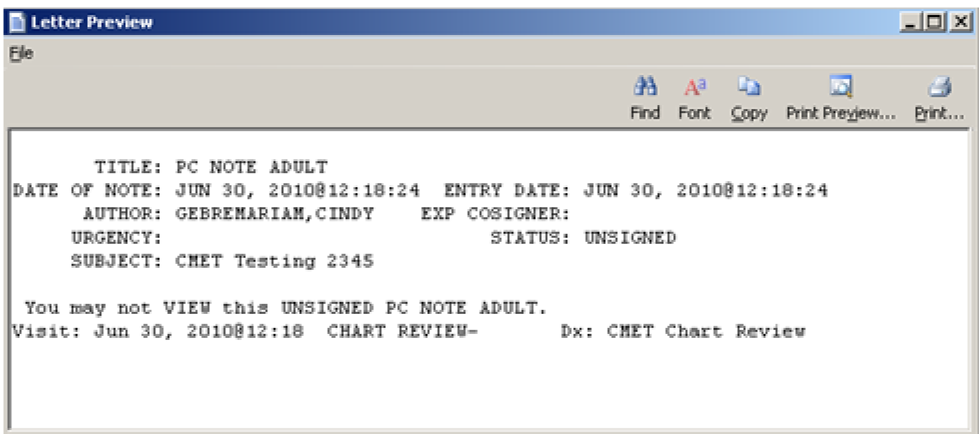


Figure 12-66: Sample Letter Preview pop-up

Close the pop-up to return to the Add a Note dialog (with the Preview button on it).

After the Add a Note dialog is complete, click OK (otherwise, click Cancel).

After clicking OK, the application displays the Enter Electronic Signature dialog.

Figure 12-67: Enter Electronic Signature dialog

Enter you electronic signature in the free text field. After completing the dialog, click OK (otherwise, click Cancel).

- If you click OK and had entered an invalid electronic signature, the application displays the Invalid Attempt information message that states: Invalid electronic signature. Try again? Click Retry to return to the Enter Electronic Signature dialog. Click Cancel and the application displays the message: Unable to save with a signed note; click OK to return to the Add a note dialog.
- If you click Cancel, the application displays the message: Unable to save with a signed note. Click OK to dismiss the message.
- If you click OK and had entered a valid electronic signature, the application displays the information message: This data will be saved to the RPMS server. Do you want to continue? Click Yes to save and to continue. Click No to not save and leave the dialog.

12.13 Erroneously Tracked Events

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

1. Go to the Tracked tab and open a CMET worksheet for the event you erroneously tracked. Click the Add button in the Findings area to access the Findings dialog.

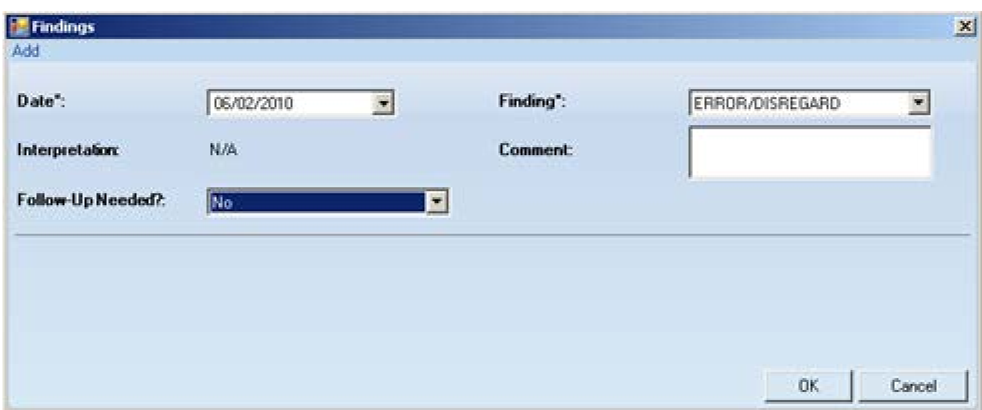


Figure 12-68: Sample Findings dialog populated

Choose the option “ERROR/DISREGARD” in the Findings field. Choose the option “No” in the “Follow-Up Needed?” field. We suggest to use today’s date for the Date field. Click OK to save and to close the dialog.

2. Go to the Patient Notifications area of the CMET Worksheet and click the Add button. The application displays the Notifications dialog.

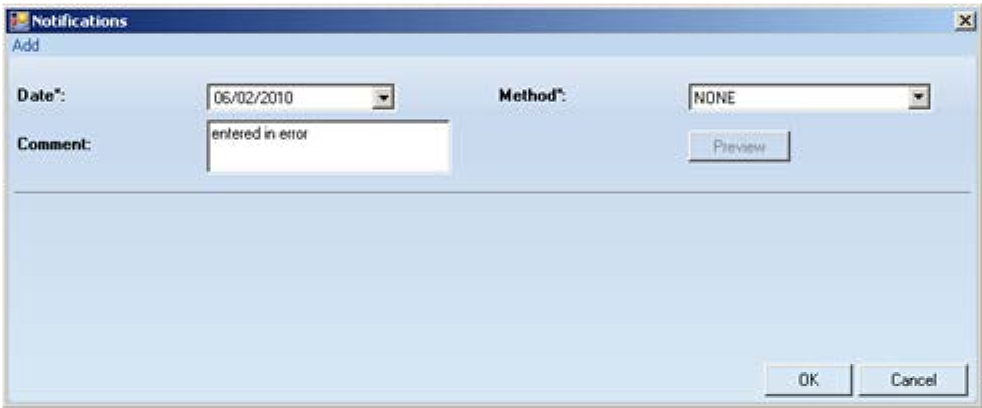


Figure 12-69: Sample Notifications dialog populated

Use the option “NONE” for the Method field. We recommend to add a comment in the Comment field and to use today’s date for the Date field. Click OK to save and to close the dialog.

3. The application will display the Close Event information message.

Figure 12-70: Close Event information message

Click Yes on the message. This closes the message.

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

Figure 12-71:RPMS iCare – Reason for Closing dialog

Select the option "Other" for the Reason field. Enter a comment in the Comment field. Click OK to save and to close the dialog.

5. The application will display the Confirm save to RPMS information message.

Figure 12-72: Confirm save to RPMS information message

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

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

Appendix A: Performance Measure Logic Example

Cancer Screening: Pap Smear Rates: Maintain the proportion of female patients ages 21 through 64 without a documented history of hysterectomy who have had a Pap screen within the previous three years at the previous level.

For CRS, the GPRA measure definition becomes:

- Denominator (total number of patients evaluated): Active Clinical female patients ages 21 through 64, excluding those with documented history of hysterectomy. (The clinical *owner* of the measure has determined based on current medical guidelines that "eligible" women are defined as ages 21-64.)
- Numerator (those from the denominator who meet the criteria for the measure): patients with documented Pap smear in past three years or refusal in <u>past year</u>.

For the programmer, the Pap Smear measure is described in terms of the following logic:

1. Begin with the Active Clinical population definition (see the User Manual for Clinical Reporting System for definitions of User Population and Active Clinical).
    - Exclude any patients with the name of "DEMO,PATIENT."
    - Exclude any patients with a date of death in the Patient Registration file.
    - Exclude any patients who do NOT have value 01 (American Indian/Alaska Native) in the Beneficiary field in Patient Registration file.
    - Exclude any patients whose Community of Residence is not included in the site's defined GPRA Community Taxonomy for this report.
    - For the remaining patients, search visit files for the three years prior to the selected Report end date. Exclude any patients whose visits do not meet the "2 medical clinics" definition <u>OR</u> for facilities with the CHS-Only site parameter set to "Yes", exclude any patients who do not have 2 CHS visits in the past 3 years.
2. From these patients, identify the subset that are female and that are ages 21 through 64 on the first day of the Current Report period.
3. Exclude patients with documented hysterectomy by searching the V Procedure file for procedure codes 68.4-68.9 or V CPT for CPT codes 51925, 56308, 58150, 58152, 58200-58294, 58550-54, 58951, 58953-58954, or 59135 any time before the end of the Report period.
4. For these patients (the denominator), check for a Pap smear in the past three years in the following order:

- V Lab is checked for a lab test called PAP SMEAR and for any site-populated pap smear lab test documented in the BGP PAP SMEAR TAX taxonomy, OR
- V Lab is checked for any LOINC code listed in the pre-defined BGP PAP LOINC CODES taxonomy (see the CRS Technical Manual for specific codes), OR
- Purpose of Visit file (V POV) is checked for: a diagnosis of: V76.2-Screen Mal Neop-Cervix, V72.31 Routine Gynecological Examination, V72.32 Encounter for Pap Cervical Smear to Confirm Findings of Recent Normal Smear Following Initial Abnormal Smear, V72.3 Gynecological Examination, Pap Cervical Smear as Part of General Gynecological Exam, Pelvic Exam (annual) (periodic) (old code, to be counted for visits prior to 10/1/04 only), V76.47 Vaginal Pap Smear for Post-Hysterectomy Patients, or V76.49 Pap Smear for Women w/o a Cervix, OR
- V Procedures is checked for a procedure of 91.46, OR
- V CPT is checked for the following CPT codes: a) 88141-88167; b) 88174-88175 or HCPCS code Q0091 Screening Pap Smear, OR
- The Women's Health Tracking package is checked for documentation of a procedure called Pap Smear, OR
- Refusals file is checked for Lab Test Pap Smear in the past year.

If a visit with any of the codes above is found, the patient is considered to have met the measure, and the program checks the next patient.

For a detailed description of the logic for each performance measure included in CRS, see the Administrator Manual, section 2.0 Performance Measure Logic.

Glossary

Context Menu

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

Designated Primary Care Provider (DPCP)

In RPMS, the provider name that is assigned as the primary care physician for a patient or group of patients at a specific facility. This is not a required function.

Free Text Field

A field where the user can type text, just like typing a note to someone.

iCare Package Manager

The designated person with authority to manage all information settings for iCare.

Panel List

The list of patient panels owned by the user.

Providers

Any staff member in an I/T/U facility who provides direct healthcare to patients, e.g. general practice or specialty physicians, registered nurses, social workers, physician assistants, etc.

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

Reminders

Health Maintenance Reminders review patient data and alert the provider to procedures that might be overdue for the patient. Reminders can be based on age and gender and include typical clinical prevention measures, such as pap smears.

"Tagging"

A process to review the patient's data and categorize ("tag") the patient with one or more clinical diagnoses, such as Known CVD or Diabetes. Tags will be used to provide more accurate reminders that are prioritized more appropriately for a patient's multiple conditions.

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.

Visit Provider

In RPMS, the provider(s) who cared for a patient on a specific visit. Each patient visit must have at least a primary provider entered. Visits can also have one or more secondary providers. The primary visit provider might or might not be the same provider as the patient's DPCP, and can change on each visit, depending on the visit type or the clinic staffing.

Acronym List

BQI	M
CQM	Clinical Quality Measures
CRS	Clinical Reporting System
GPRA	Government Performance and Results Act
GUI	Graphical User Interface
HHS	Health and Human Services
IHS	Indian Health Service
IPC	Improving Patient Care
MU	Meaningful Use
OIT	Office of Information Technology
PM	Performance Measures
RPMS	Resource and Patient Management System

Contact Information

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

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

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

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