RESOURCE AND PATIENT MANAGEMENT SYSTEM

Patient Information Management System

(PIMS)

Addendum to User Manual

Version 5.3 Patch 1013
October 2011

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

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Preface

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

Security

This patch uses the same security keys as described in the Patient Information Management System User Manual version 5.3.

1.0   Introduction

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

1.1   Summary of Changes

Patch 1013 provides corrections and enhancements to version 5.3 of the Patient Information Management System.

Modifications

- New Advanced Access Report

- New site parameter for changing the routing slip default

- Add other phone to appointment list

- Modified Month-at-a-Glance to display alphabetically

- Add Day Surgery as a Treating Specialty

- Modify Census reports to reflect Day Surgery

- Field created to capture reason for deleting an admission, add to BDG Deleted Admits bulletin

- Modify workload report to mask SSN and add HRN

- Fix wait list so recall dates sort properly

- Add Wait List as a letter type

- Add option to print letters from Wait List

2.0   Scheduling (SCH)

2.1   Appointment List

SCH > AL

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

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

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

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

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

Figure 2-1: Selecting an appointment list

```
Appointment list           Jul 11, 2011 13:41:51             Page 1 of 1

        Confidential Patient Data Covered by Privacy Act
Time   Patient Name      HRCN        DOB(Age)      Lab@      X-ray@      EKG@
       Insurance & Appointment Information

Appointments for GENERAL clinic on Jul 11, 2011

3:00 PM (15Mins)          (Outpatient)
     GOURD, FREDA MILLER    #167199   1/6/1946 (65Y)
        (MCR)
        Home Phone: 555-555-5783   Work Phone:
        Other Phone:  555-555-5711

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

Figure 2-2: Appointment List Display

2.2   Month-At-A-Glance Display

SCH>MD

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

To display availability follow these steps:

1. Select principle clinic which has multiple clinics linked to it.

2. At the next prompt select 'Display first available for clinics under this grouping'

3. Enter earliest possible appointment date.

4. Enter latest possible appointment date.

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

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

This is a Principle Clinic!

1 Display availability of just this clinic
2 Display first available for clinics under this grouping
Select 1 or 2: (1-2): 2// 2

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

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

```
1st APPTS FOR PRINCIPAL CLINIC Jul 15, 2011 11:25:54    Page 1 0f 2

BLUE FP PRINCIPLE

            Time|8      |9     |10    |11    |12    |1         |2     |3
            Date|       |      |      |      |      |          |2     |3
NURSE- BLUE/GEN
Jul 15, 2011 FR 15[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 18, 2011 MO 18[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 19, 2011 TU 19[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 20, 2011 WE 20[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 21, 2011 TH 21[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 22, 2011 FR 22[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 25, 2011 MO 25[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
Jul 26, 2011 TU 26[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |   [1 1 1 1 |1 1 1 1|1 1
```

```
Jul 27, 2011 WE 27[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |  [1 1 1 1 |1 1 1 1|1 1
Jul 28, 2011 TH 28[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |  [1 1 1 1 |1 1 1 1|1 1
Jul 29, 2011 FR 29[1 1 1]|1 1 1 1|1 1 1 1|1 ]  |  [1 1 1 1 |1 1 1 1|1 1
+     Enter?? for more actions
Select Action: Next Screen//
```

Figure 2-4: Availability of 1st appointments for this principle clinic

2.3   Waiting List

2.3.1   Waiting List Display

SCH>WL

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

```
Waiting List Entry/Edit   July15, 2011 13:45:07     Page 1 of 1
         Confidential Patient Data Covered by Privacy Act


                      GENERAL

   Patient Name          Chart #   Date Added    Recall Date   Priority

1 DEMO, BOBBIE           176224    MAY 18, 2011  JUN 01, 2011  MIDDLE
2 GOURDS, FREDA MILLER   167199    APR 01, 2011  JUN 01, 2011  HIGH
3 TONEY, JEANETTE        167019    JUN 10, 2011  JUN 01, 2011  MIDDLE
4 DEMO, KATHIE           137882    JUN 02, 2011  SEP 01, 2011  MIDDLE
5 BRADLEY, CHARLES       165414    JAN 01, 2011  DEC 20, 2011  HIGH
6 DEMO, RACHEL H         137834    JUL 14, 2011  FEB 10, 2012  MIDDLE
7 DEMO, SHARON           121981    JUN 22, 2011  MAR 01, 2012  MIDDLE

Enter?? For more actions

1  Add Patient to List   4  View Single Entry     Q Quite
2  Edit Entry on List    5  List Closed Cases
3  Remove From List      6  Print Letters
Select Action:  Quit//
```

Figure 2-5: Waiting List displayed by recall date

2.3.2   Printing Recall Letters

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

The printed letter will include the recall date and the name of the wait list clinic/ward.

Patient Name	Chart#	Date Added	Recall Date	Priority
1 DEMO, BOBBIE	176224	May 18, 2011	JUN 01,2011	MIDDLE

```
2 GOURD, FREDA MILLER  167199     APR 01, 2011     JUN 01,2011     HIGH
3 TONEY, JEANETTE       167019     JUN 10, 2010     JUN 01,2011     MIDDLE
4 DEMO, KATHIE          137882     JUN 02, 2011     DEC 20,2011     MIDDLE
5 BRADLEY, CHARLES      165414     JAN 01, 2011     DEC 20,2011     HIGH
6 DEMO, RACHEL H        137834     JUL 14, 2011     FEB 10,2012     MIDDLE
7 DEMO, SHARON          121981     JUN 22, 2011     MAR 01,2012     MIDDLE


Enter ?? for actions


2  Edit Entry on List      5   List Closed Cases
3  Remove from List 6   Print Letters
Select Action Quit// 6     Print Letters
Selection LETTER NAME: general   WAIT LIST WAIT LIST
WAIT LIST LETTERS FOR WHICH DIVISION:  CIHA HOSPITAL    7247
Select Patient(s): (1-7): 1-7

DEVICE: HOME// printer110
```

Figure 2-6: Printing Recall Letters

3.0   Admission/Discharge/Transfer (ADT)

3.1   Treating Specialty

ADT>SM>SYS>SAF

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

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

The Day Surgery treating specialty should only be used when the patient is located in the inpatient area. An exception to this would be if the facility set up a separate ward for all ambulatory care surgical services. This would allow the facility to use ADT for both the inpatient (xxx) and (xx) the outpatient delivery areas. The provider can select the service of "DS" and then select either an inpatient ward or the new ward. The advantage is that the provider only has to remember one way to admit patients; further, delayed orders can be used on Day Surgery patients as well.
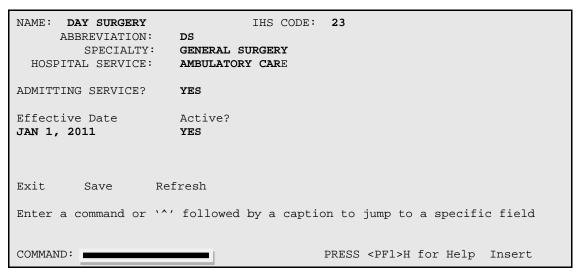
```
NAME:  DAY SURGERY                IHS CODE:  23
      ABBREVIATION:    DS
         SPECIALTY:    GENERAL SURGERY
  HOSPITAL SERVICE:    AMBULATORY CARE

ADMITTING SERVICE?     YES

Effective Date         Active?
JAN 1, 2011            YES




Exit      Save       Refresh

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


COMMAND: ▬▬▬▬▬▬▬▬▬▬▬|            PRESS <PF1>H for Help  Insert
```

Figure 3-1: Setup ADT File

3.2   Extended Bed Control (EBC)

ADT>BC>EBC

A new field has been added which requires the user to enter a reason that an admission is being deleted.

Once the admission is deleted, all recipients who receive the BDG Deleted Admits bulletin through mailman will all see this same reason on their notification.

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

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

Updating automated team lists…completed.

Updating appointment status…completed.

…Inpatient Medication check…
…discontinuing Inpatient Medications order…done…
```

Figure 3-2: Deleting an Admission

4.0   Sensitive Patient Tracking (SPT)

4.1   Display User Access

SPT>DUA

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

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

```
ACCESS TO PATIENT RECORD       AUG 04, 2011 12:51:47      Page 1 of 1

Sensitive Patient Access for JAN 1, 2011 to AUG 4, 2011
Patient Name: GOURD, FREDA MILLER   #167199   Date of Birth: Jan 06, 1946


USER                 DATE ACCESSED             OPTION/PROTOCOL USED

BRONSON,GINNY        JUN 07, 2011@15:57        Appointment Management
SMITH,CHERYL         AUG 04, 2011@10:12        Extended Bed Control
SMITH,CHERYL         JUL 11, 2011@13:40        EDIT a patient's file
SMITH,CHERYL         JUL 11, 2011@13:39        Make Appointment
SMITH,CHERYL         JUN 06, 2011@14:19        Extended Bed Control
SMITH,CHERYL         May 25, 2011@14:31:10     Extended Bed Control
SMITH,CHERYL         May 25, 2011@14:31        Extended Bed Control
SMITH,CHERYL         May 25, 2011@14:28        Admit a Patient
SMITH,CHERYL         May 19, 2011@16:16        Admit a Patient
SMITH,CHERYL         May 19, 2011@14:49        View Admission History


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

Figure 4-1: Display User Access Report

5.0   Report Changes

5.1   PIMS Reports

5.1.1   Advanced Access Report

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

SCH > SCR > WSR > 8

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

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

     Select one of the following
        I        Include ALL Patients
        E        Exclude DEMO Patients
        O        Include ONLY DEMO Patient
Demo Patient Inclusion/Exclusion:  E//Include ALL Patients
```

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

```
ADVANCED ACCESS REPORT     AUG 04, 2011 14:18:30   Page: 1 of 1
```

		External Demand		Internal	Unmet
Date	Category	Appt	WI	FU	WL

Advanced Access Report
For dates: Jun 01, 2011 to AUG 04, 2011

Date	Category	External Appt	Demand WI	Internal FU	Unmet WL
Jun 07, 2011					
	ANTICOAGULATION	4	0	0	0
External Demand Subtotal		4	FU Subtotal	0	
Jun 09, 2011					
	ANTICOAGULATION	0	0	0	0
External Demand Subtotal		0	FU Subtotal	0	
Aug 04, 2011					
	ANTICOAGULATION	1	1	1	1
External Demand Subtotal		2	FU Subtotal	1	

```
External Demand Total          6          FU Total     1

Enter ?? for more actions

Selection Action: Quit//
```

Figure 5-2: Example of the Advanced Access Report for one clinic

5.1.2   Routing Slips

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

SCH > SCS > RS

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

      Select one of the following:
         A       All Routing Slips
         O       Only Add-Ons
Select ALL Routing Slips (A) or Only Add-ons (O): : // ALL Routing SlipsLL
ROUTING SHEETS

   Select one of the following:
   1   TERMINAL DIGIT
   2   CLINIC NAME
   3   PRINCIPLE CLINIC
   4   PATIENT NAME

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

DEVICE PRTEG1//
```

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

5.1.3   Workload/Statistical Report

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

SCH > SCR > WSR > 5

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

   **** Date Range Selection****

   Beginning DATE: 07012011 (JUL 01, 2011)
```

```
   Ending    Date: t (AUG 10, 2011)

Totals by (C)LINIC or (S)TOP CODE?  C//CLINIC

Select clinic:  ALL//
Brief or Expanded Report?  E//Expanded
(D)ETAIL BY DAY or (S)UMMARY BY MONTH?:  D//DETAIL BY DAY
Do you want to see patient names?  No//Y (Yes)
Do you want to compare this data to the same period in the previous year?
No// (No)

Report will cover the period from: 07/01/2011 through 08/10/2011

DEVICE:  HOME//
```

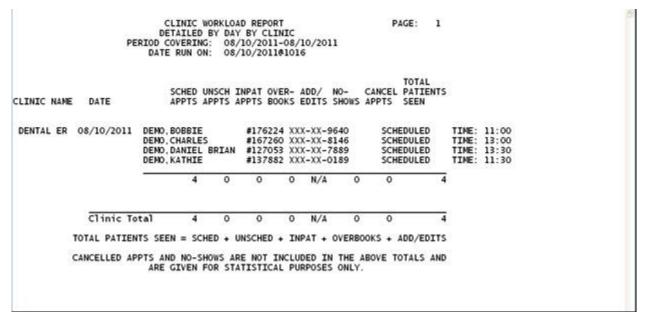Figure 5-4: Steps to print Clinic Workload report to display HRN & SSN

Figure 5-5: Example: Clinic Workload Report

5.1.4   Print Letter Tracking by Patient

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

To turn on/off the letter tracking option:

SCH>SCS>ACM>ESP

TRACK LETTER PRINTING: YES

```
Choose from:
0    NO
1    YES

SCH>SCR>LETT

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

Select Report Menu (Scheduling) Option: LETT Print Letter Tracking By
Patient
Select Patient:  DMEO, BOBBIE
                                   F   **SENSITVE**     CI 176224

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

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

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

Letter	Last Date Printed	Number of Items
OPD Pre-Appt (Blue)	JUL 01, 2011	2
GENERAL WAIT LIST	JUL 15, 2011	12

Figure 5-6: Example: Letter Tracking by Patient

5.2   ADT Reports

5.2.1   ADT Statistical Reports

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

ADT > RM > ASR

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

   1 Average Daily Patient Load (ADPL)
   2 Inpatient Statistics by Ward
   3 Inpatient Statistics by Service
   4 On-line Help (Report Descriptions)
Choose report from List: (1-4): 2
Select Beginning Date: 01012011 (JAN 01, 2011)
Select Ending Date: T (Aug 08, 2011)
Include INACTIVE WARDS? NO//

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

Figure 5-7: Example of how to generate the Inpatient Statistics by Ward Report

Contact Information

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

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm

Email: support@ihs.gov