Patient Registration

(AG)

Addendum to User Manual

Version 7.1 Patch 15
September 2020
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The Patient Registration system (AG) is an application that exists in the Resource Patient Management System (RPMS). The system is used to register and manage patient records and is used for all other RPMS applications. Statistics and data are gathered from the Patient Registration system.

A Windows-based interface has been developed. Please reference the documentation for the Practice Management System (BPRM), Patient Registration for updates.
1.0 Introduction

Please review these changes and add a copy of them to any printed documentation your site may be using for Patient Registration (AG) v7.1. 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.

The addendum only provides guidance on changes made in the patch that are relevant to the user. To see a list of all changes made in a patch, please refer to the patch notes for each of the respective patches.

1.1 Background

In order to efficiently capture and share patient data, healthcare providers need an electronic health record (EHR) that stores data in a structured format. Structured data allows healthcare providers to easily retrieve and transfer patient information and use the EHR in ways that can aid patient care.

The Centers for Medicare and Medicaid Services (CMS) and the Office of the National Coordinator for Health Information Technology (ONC) have established standards and other criteria for structured data that EHRs must meet in order to qualify for use in the Promoting Interoperability Programs.

To avoid a downward payment adjustment, healthcare providers must use the 2015 Edition of Certified EHR Technology (CEHRT) beginning with the EHR reporting period in 2019. CEHRT gives assurance to purchasers and other users that an EHR system or module offers the necessary technological capability, functionality, and security to help them meet the meaningful use criteria.

Certification also helps healthcare providers and patients be confident that the electronic health IT products and systems they use are secure, can maintain data confidentially, and can work with other systems to share information. For more information on the 2015 Edition of CEHRT, review the fact sheet (PDF) at https://www.cms.gov/files/document/2015-edition-cehrt-fact-sheet.pdf.

The 2015 Edition of CEHRT does not have to be implemented on January 1. However, the functionality must be in place by the first day of the EHR reporting period and the product must be certified to the 2015 Edition criteria by the last day of the EHR reporting period. The eligible hospital or CAH must be using the 2015 Edition functionality for the full EHR reporting period. In many situations the product may be deployed, but pending certification.
Healthcare providers participating in the Promoting Interoperability Programs must attest to certain statements to demonstrate that they have not knowingly and willfully taken action to limit or restrict the compatibility or interoperability of their CEHRT. Collectively, these statements are referred to as the “prevention of information blocking attestation.”


The modifications to the Patient Registration system allows the Indian Health Service to meet the requirements to meet the 2015 certification.

1.2 Sexual Orientation/Gender Identity (SO/GI)

Patient Registration Patch 15 introduces the concept of collecting patient data for sexual orientation and gender identity (SO/GI). Collecting SO/GI data in RPMS is essential to providing high-quality, patient-centered care to Lesbian, Gay, Bisexual and Transgendered (LGBT) and Two-Spirited individuals. SO/GI data collection has been recommended by the Institutes of Medicine and Joint Commission as a way to learn about which populations are being served, and to measure quality of care provided to LGBT and Two-Spirited people. Gathering this data is an important part of identifying and addressing LGBT and Two-Spirited health disparities in health centers and other healthcare organizations.

Federal Data Requirements

In March 2016, HRSA added SO/GI data as required elements to be reported yearly in the Uniform Data System (UDS), beginning in calendar year 2016. The Program Assistance Letter (PAL 2016-2) states that “sexual orientation and gender identity (SO/GI) can play a significant role in determining health outcomes,” and that “gaining a better understanding of populations served by health centers, including sexual orientation and gender identity, promotes culturally competent care delivery, and contributes to reducing health disparities overall.”

HRSA has issued changes to Tables 3A and 3B to report data on sex at birth, current gender identity, and sexual orientation.

In addition, in 2015 the Centers for Medicare and Medicaid Services (CMS) and the Office of the National Coordinator for Health Information Technology (ONC) issued rules requiring all electronic health record (EHR) systems certified under the Meaningful Use incentive program to have the capacity to record, change, and access structured SO/GI data. The requirement applies to vendors who are building certified EHR systems and to health institutions and practices that are using these systems as part of their participation in the Meaningful Use program. Many vendors are currently working with experts in LGBT health to develop this capacity.
Process Changes

It is important to ensure that staff training has been provided. Part of the training relies on introducing processes and updating paperwork to allow the SO/GI updates in RPMS to be successfully implemented.

The Office of Resource, Access and Partnerships (ORAP), Office of Information Technology (OIT) along with the National HIV/AIDS & HepC Program has been providing training prior to the implementation of the SO/GI changes and is recommending a phased approach to start implementation. Check the RPMS Training Website for additional information.

1.3 Summary of Changes

Patch 15 provides enhancements and software fixes to Version 7.1 of the Patient registration application.

1.3.1 Patch 15

This patch adds the following functionality:

- **Preferred Name**
  
  Patient Registration may now record and update the **Preferred Name** field on page 7. The following displays have been updated to include the preferred name:
  - All Patient Registration screen banners
  - Face Sheet

- **Sexual Orientation/Gender Identity (SOGI)**
  
  Patient Registration may now record and update SOGI data on page 11. This includes:
  - Pronouns (#9002) and Pronouns Other (#9003)
  - Legal Sex subfile (#9000001.9201)
  - Sexual Orientation subfile (#9000001.9301)
  - Gender Identity subfile (#9000001.9401)

  Direct entry to this page may also be performed in the new menu option:
  - P11 PAGE11 – Sexual Orientation/Gender Identity [AGEDITPAGE11]
    
    Which is locked with a new security key: **> Locked with AGZEDITPAGE11

- **Allow multiple Patient Race/Ethnicity entries**
  
  Patient’s Ethnicity may now have multiple entries similar to Race.
The following two entries are considered “exclusive” and cannot be used with other entries: DECLINED TO ANSWER, UNKNOWN BY PATIENT.

If the Patient’s selection contains an “exclusive” entry and other entries, the user will be prompted for correction.

In addition, the Race and Ethnicity tables have been updated to the larger CDC Race/Ethnicity code set.

This patch UPDATES the following functionality:

- **Birth Sex Label**
  Various displays and prompts referencing Patient Sex have been updated to Patient Birth Sex to reflect the ONC clarification of the intended purpose of this field.

  The following displays have been updated:
  - AGEDIT page 1
  - Face Sheet
  - AG PATIENT REGISTRATION ERROR CODES #9 and #54

- **Patient Registration Editor Pages**
  The patient banner used across the Registration Editor pages has been standardized and includes the Patient’s Preferred Name. The Last Edited By now displays at the bottom of the pages. Page control flow has also been standardized.

- **Insurer Type**
  Updated remaining references on Page 4 to use the Insurer Type field.
2.0 Patch 15

2.1 Birth Sex

On Page 1, question #5 of the Registration Editor allows the user to add the sex of the patient. The label of the field has been changed from Sex to Birth Sex. This allows the registration user to correctly record the patient’s sex recorded at birth.

IHS REGISTRATION EDITOR (page 1) INDIAN HEALTH HOSPITAL
================================================================================================
DOE, JOHN E HRN: 5194
================================================================================================
1. ELIGIBILITY STATUS : CHS & DIRECT
2. DATE OF BIRTH : 12/25/1959
5. BIRTH SEX : MALE
6. SOCIAL SECURITY NUMBER : 000000000 (Not yet verified by the SSA)
7. MARITAL STATUS : NEVER MARRIED
8. CURRENT COMMUNITY : MT PLEASANT
9. RX PATIENT RESIDENCE :
================================================================================================
10. STREET ADDRESS [LINE 1] : 1357 S LEATON RD
11. STREET ADDRESS [LINE 2] :
12. STREET ADDRESS [LINE 3] :
13. CITY : MT PLEASANT 14. ST : UN 15. ZIP+4 :
16. LOCATION OF HOME :
================================================================================================
19. OTHER PHONE :
================================================================================================
Last edited by: DEMO, USER on Nov 17, 2009
================================================================================================
CHANGE which item? (1-19) NONE://:

Figure 2-1: Display of Birth Sex on Page 1 of Registration Editor

No new entries have been added with to this field so the values of M (Male), F (Female), or U (Unknown) still remain.

Adding a new patient entry into the Registration system will also ask for the birth sex by displaying the PATIENT BIRTH SEX field.

Enter the PATIENT'S NAME: DEMO, SOGI A
ARE YOU ADDING 'DEMO, SOGI A' AS A NEW PATIENT (THE 7468TH)? No// YES (Yes)
Enter complete middle name if known or press <return> to add as entered: :

PATIENT BIRTH SEX: ??
Enter 'M' for MALE, 'F' for FEMALE, or 'U' if UNKNOWN.
Enter 'M' if this patient is male, 'F' if female, or 'U' if unknown.
These codes are intended to present birth sex (i.e., the sex recorded on the patient's birth certificate) and not gender identity or reassigned sex.
CHOOSE FROM:
M  MALE
F  FEMALE
U  UNKNOWN

PATIENT BIRTH SEX:

Figure 2-2: Display of Patient Birth Sex while adding a new patient entry

2.1.1 Patient Registration Error Codes

The error codes in Table 2-1 have been updated to reflect the correct use of the Birth Sex description on Page 1 of the Registration Editor.

Table 2-1: Updated error codes in the Registration Editor

<table>
<thead>
<tr>
<th>Error No.</th>
<th>Old Description</th>
<th>New Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Patient's gender incomplete</td>
<td>Patient's Birth Sex incomplete</td>
<td>Error</td>
</tr>
<tr>
<td>54</td>
<td>Patient's SEX unknown</td>
<td>Patient's Birth Sex Unknown</td>
<td>Warning</td>
</tr>
</tbody>
</table>

The descriptions have been updated to clarify the intended purpose of the Birth Sex field. The error or warning status’ will remain the same.

2.2 Sexual Orientation/Gender Identity (SO/GI)

New options have been introduced that allow the capture of the patient’s sexual orientation and gender identity (SO/GI).

2.2.1 Registration Editor Page 11: Sexual Orientation/Gender Identity

A new page has been added to the Registration Editor. Page 11 will allow updates to the patient’s record. See below for a definition of each of the fields.

Figure 2-3: Display of Registration Editor, page 11, Sexual Orientation/Gender Identity
2.2.1.1 Pronoun

A pronoun is a word used in place of a noun. In this case, gender pronouns are pronouns that a person chooses to use for themselves to describe their gender. For some people, a change of pronouns can help them identify more closely with the gender they identify with. Although some pronouns may be described as being masculine or feminine, there are gender-neutral pronouns that may be used.

To update the patient’s pronoun, access Page 11 and select #1 to edit:

1. Type the pronoun category at the **Pronoun** field and press Enter.

2. The system will update the display with the pronoun types under the category selected.

---

**IHS REGISTRATION EDITOR (page 11)**

================================================================================
DOE, JOHN E HRN: 5194 CHS & DIRECT
================================================================================
SEXUAL ORIENTATION/GENDER IDENTITY
1. PRONOUN ......................:
2. LEGAL SEX .................:
3. GENDER IDENTITY ..........:
4. SEXUAL ORIENTATION ........:
================================================================================
Last edited by: DEMO, USER M on May 04, 2020
================================================================================
CHANGE which item? (1-4) NONE//: 1
Pronouns: ??
Enter the Pronouns provided by the patient, or if the patient does not know or chooses not to disclose. If the patient specifies Pronouns not listed, select the Other entry and enter the response in the free-text field.

Choose from:
- DECLINED TO ANSWER ASKU
- DO NOT KNOW UNK
- FEMININE SHE, HER, HER, HERS, HERSELF
- MASCULINE HE, HIM, HIS, HIS, HIMSELF
- NE NE, NEM, NIR, NIRS, NEMSELF
- NEUTRAL THEY, THEM, THEIR, THEIRS, THEMSELVES
- OTHER OTH
- SPIVAK EY, EM, EIR, EIRS, EMSELF
- VE VE, VER, VIS, VIS, VERSELF
- XE XE, XEM, XYR, XYRS, XEMSELF
- ZE-HIR ZE, HIR, HIR, HIRS, HRSELF
- ZE-ZIR ZE, ZIR, ZIR, ZIRS, ZIRSELF

---

Figure 2-4: Editing the Pronoun on Page 11 of the Registration Editor
Some of the characteristics of this new field include:

- This is not a required field. If the patient chooses not to answer, the field may be left blank.
- Answer with **DECLINED TO ANSWER** if the patient refuses or declines to answer. This is to prevent the patient from being asked again.
- Only one pronoun may be entered. The patient may always have the ability to update this if needed.

Table 2-2 lists the pronouns that the user can select. This may help to determine how the pronoun is used in a sentence or in conversation.

<table>
<thead>
<tr>
<th>Term</th>
<th>Example</th>
<th>Nominative (Subject)</th>
<th>Objective (Object)</th>
<th>Possessive Determiner</th>
<th>Possessive Pronoun</th>
<th>Reflective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feminine</td>
<td>She, Her, Hers, Herself</td>
<td>She laughed</td>
<td>I called her</td>
<td>Her eyes gleam</td>
<td>That is hers</td>
<td>He likes herself</td>
</tr>
<tr>
<td>Masculine</td>
<td>He, Him, His, Himself</td>
<td>He laughed</td>
<td>I called him</td>
<td>His eyes gleam</td>
<td>That is his</td>
<td>He likes himself</td>
</tr>
<tr>
<td>Ne</td>
<td>Ne, Nem, Nir, Nirs, Nemself</td>
<td>Ne laughed</td>
<td>I called nem</td>
<td>Nir eyes gleam</td>
<td>That is nirs</td>
<td>Ne likes nemself</td>
</tr>
<tr>
<td>Neutral</td>
<td>They, Them, Their, Theirs, Themselves</td>
<td>They laughed</td>
<td>I called them</td>
<td>Their eyes gleam</td>
<td>That is theirs</td>
<td>They like themselves</td>
</tr>
<tr>
<td>Spivak</td>
<td>Ey, Em, Eir, Eirs, Emself</td>
<td>Ey laughed</td>
<td>I called em</td>
<td>Eir eyes gleam</td>
<td>That is eirs</td>
<td>Ey likes emself</td>
</tr>
<tr>
<td>Ve</td>
<td>Ve, Ver, Vis, Vis, Verself</td>
<td>Ve laughed</td>
<td>I called ver</td>
<td>Vis eyes gleam</td>
<td>That is vis</td>
<td>Ve likes verself</td>
</tr>
<tr>
<td>Xe</td>
<td>Xe, Xem, Xyr, Xyrs, Xemself</td>
<td>Xe laughed</td>
<td>I called xem</td>
<td>Xyr eyes gleam</td>
<td>That is xyrs</td>
<td>Xe likes xemself</td>
</tr>
<tr>
<td>Ze-Hir</td>
<td>Ze, Hir, Hirs, Hirself</td>
<td>Ze laughed</td>
<td>I called hir</td>
<td>Hir eyes gleam</td>
<td>That is hirs</td>
<td>Ze likes hirself</td>
</tr>
<tr>
<td>Ze-Zir</td>
<td>Ze, Zir, Zirs, Zirself</td>
<td>Ze laughed</td>
<td>I called zir</td>
<td>Zir eyes gleam</td>
<td>That is zirs</td>
<td>Ze likes zirself</td>
</tr>
</tbody>
</table>

**Using OTHER as a Pronoun Category**

Most pronouns have been captured, but if there is a pronoun that is not listed or if the patient has a different pronoun set, the reason of **OTHER** may be selected. The system will then display the **Other Pronoun** field.
At this prompt, enter one or more pronoun types. If more than one entry is needed, separate those entries with a comma. An entry up to 50 characters may be entered.

Change which item? (1-4) NONE//: 1
Pronouns: OTHER OTH
Other Pronouns: ZE,ZIR,ZIRS,ZIRSELF

Figure 2-5: Example of adding OTHER pronouns and the description

Once the entry has been added, it will display for the user.

IHS REGISTRATION EDITOR (page 11) INDIAN HEALTH HOSPITAL
================================================================================
DOE, JOHN E HRN: 5194 CHS & DIRECT
================================================================================
SEXUAL ORIENTATION/GENDER IDENTITR
1. PRONOUN...............: ZE,ZIR,ZIRS,ZIRSELF
2. LEGAL SEX...............:
3. GENDER IDENTITY........:
4. SEXUAL ORIENTATION....:
================================================================================
Last edited by: DEMO, USER M on May 04, 2020
================================================================================
Change which item? (1-4) NONE//:

Figure 2-6: Display of Pronoun after adding OTHER along with unique pronoun entries

Note: Use caution when editing the Pronoun after adding entries. If the Pronoun is modified, the original entries will be removed.

2.2.1.2 Legal Sex

The gender/sex labels are used in legal contexts, such as on identity documents, medical record and health insurance. Some people may change the sex/gender on some or all of their legal documents to better align with their gender identity. If the patient changes their legal sex on the health record, it is still important for the provider to be aware of the patient’s sex assigned at birth, as this information is pertinent to their care.

Legal Sex is used to document a gender other than the birth sex (from Page 1) and the patient must present proof of their legal sex. This is likely for patients who have undergone sex reassignment surgery and have had their gender officially changed on their official documents.
To update the patient’s legal sex, access Page 11 and select #2 to edit:

1. If the Legal Sex had been populated prior to being edited, the system will display the effective date, legal sex, the legal sex source and the date the entry was added to the record. The entry may be updated or new entries may be added.

2. To add a new entry, type the date the legal sex came into effect and press Enter.

3. The system will now ask for the legal sex. Type M—Male, F—Female, or U—Unknown to add a legal sex entry and press Enter.

4. Add the source document used to validate the legal sex update. This is done by indicating the document during validation. The list of documents comes from the Eligibility Modifiers file but the following may be available for use:
   a. Court Order
   b. Physician State Specific Declaration
   c. State Birth Certificate
   d. State ID
   e. State Motor Vehicle Driver’s License

To add or edit the list of documents, refer to Section 2.7 for detailed instructions.

5. The system will update the display with the legal sex and document type under the category selected. If multiple entries exist, the most recent effective date will display. Historical entries will be stored, select the field to view all entries.

```
IHS REGISTRATION EDITOR (page 11)                       INDIAN HEALTH HOSPITAL
--------------------------------------------------------------------------------
DOE, JOHN E                                             HRN: 5194   CHS & DIRECT
--------------------------------------------------------------------------------
SEXUAL ORIENTATION/GENDER IDENTITY
1. PRONOUN....................: HE, HIM, HIS, HIS, HIMSELF
2. LEGAL SEX..................
3. GENDER IDENTITY..........:
4. SEXUAL ORIENTATION......:
--------------------------------------------------------------------------------
Last edited by: DEMO, USER M on May 04, 2020
================================================================================
CHANGE which item? (1-4) NONE//: 2
================================================================================
EFFECTIVE DT   LEGAL SEX      LEGAL SEX SOURCE                      DT ENTERED
--------------------------------------------------------------------------------
No Legal Sex records to display.
================================================================================
Select Effective Date of Legal Sex: 3/1/2020   MAR 01, 2020
LEGAL SEX EFFECTIVE DATE: MAR 1, 2020//
LEGAL SEX: ??
Enter the Legal Sex from the document provided by the patient. If the document does not specify or contains a Legal Sex not listed, select the U(nknown/Other) entry. ‘M’ for Male, ‘F’ for Female, and ‘U’ for
```
Unknown/Other.

Choose from:
M MALE
F FEMALE
U UNKNOWN/OTHER

LEGAL SEX: F FEMALE
LEGAL SEX SOURCE: ??
Enter the type of document provided by the patient. These are selected from the ELIGIBILITY MODIFIERS file that contain a type of 'S'.

Choose from:
COURT ORDER LS
PHYSICIAN STATE SPECIFIC DECLAR S
STATE BIRTH CERTIFICATE NLS
STATE ID LS
STATE MOTOR VEHICLE DRIVER'S LICENSE NLS

LEGAL SEX SOURCE: COURT ORDER

Figure 2-7: Establishing the Legal Sex entry in the Patient Record

Once the entry has been added, it may be edited or reviewed. Select question #2 to display the history of legal sex updates along with some additional fields to review.

CHANGE which item? (1-4) NONE//: 2

<table>
<thead>
<tr>
<th>EFFECTIVE DT</th>
<th>LEGAL SEX</th>
<th>LEGAL SEX SOURCE</th>
<th>DT ENTERED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2020</td>
<td>MALE</td>
<td>COURT ORDER</td>
<td>5/4/2020</td>
</tr>
</tbody>
</table>

Select Effective Date of Legal Sex: JAN 01, 2020//

Figure 2-8: Change or review legal sex and additional fields

2.2.1.3 Gender Identity

Gender identity refers to a person’s internal sense of their gender (e.g., being a man, woman, genderqueer, or gender non-conforming) and potential affiliation with a gender community (e.g., women, trans women, genderqueer) or who they are. For example, a person may think of themselves as male, as female, as a combination of male and female, or as another gender.

To update the patient’s gender identity, access Page 11 and edit question #3:

1. Type the gender identity the patient identifies as and press Enter.

2. The system will display the gender identity that was entered.
SEXUAL ORIENTATION/GENDER IDENTITY

1. PRONOUN....................: HE,HIM,HIS,HIS,HIMSELF
2. LEGAL SEX..................: FEMALE (COURT ORDER)
3. GENDER IDENTITY............:
4. SEXUAL ORIENTATION.........:

CHANGE which item? (1-4) NONE//: 3
Select Gender Identity(s): ??

You may enter a new GENDER IDENTITY, if you wish
Enter the Gender Identity(s) provided by the patient. If the patient
does not know or chooses not to disclose, that should be the only response
entered. If the patient specifies Gender Identity(s) not listed, select
the Other entry and enter the response in the free-text field.

Choose from:
DECLINED TO ANSWER ASKU
DO NOT KNOW UNK
IDENTIFIES AS FEMALE F
IDENTIFIES AS MALE M
NONCONFORMING GENDER NCG
OTHER OTH
TRANSGENDER FEMALE MTF
TRANSGENDER MALE FTM

Select Gender Identity(s): MTF

Figure 2-9: Updating the Gender Identity on Page 11 of the Registration Editor

Some of the characteristics of this new field include:

- This is not a required field. If the patient chooses not to answer, the field may be left blank.

- Answer with DECLINED TO ANSWER if the patient refuses or declines to answer. This is to prevent the patient from being asked again.

- Multiple entries for gender identity may be entered. The patient may always have the ability to update this if needed for future visits. If the gender identity is no longer valid or an entry has been entered on accident, the entry may be deleted by typing Shift+2 or the “@” sign.

Using OTHER as the Gender Identity Reason

Although most of the categories of gender identity have been added for the user to select from, the patient may have a different way of identifying their gender identity. To identify the patient’s gender identity(s) not included, select the OTHER entry:
After the **OTHER** entry has been selected, the system will display the **Other Gender Identity** field. Enter the patient’s gender identity(s) provided in this free-text field, separating multiple entries (if present) with a comma, up to a maximum of 50-characters and press Enter.

```
CHANGE which item? (1-4) NONE//: 3
Select Gender Identity(s): TRANSGENDER FEMALE// OTHER OTH
   Enter the specific Gender Identity(s) provided by the patient. This free-text field enables a patient to specify Gender Identity(s) not listed in the distributed code set.

Other Gender Identity: TWO-SPIRIT
```

Figure 2-10: Selecting OTHER and adding patient-specific Gender Identity(s)

Once the entry has been added, the field will display with the patient-defined gender identity. The display will include (OTH) next to the entry to indicate the patient’s response was entered as free-text.

```
IHS REGISTRATION EDITOR (page 11) INDIAN HEALTH HOSPITAL
================================================================================
DOE, JOHN E HRN: 5194 CHS & DIRECT
================================================================================
SEXUAL ORIENTATION/GENDER IDENTITY
1. PRONOUN....................: HE, HIM, HIS, HIS, HIMSELF
2. LEGAL SEX..................: FEMALE (COURT ORDER)
3. GENDER IDENTITY............: TRANSGENDER FEMALE TWO-SPIRIT (OTH)
4. SEXUAL ORIENTATION........:
================================================================================
Last edited by: DEMO, USER M on May 04, 2020
================================================================================
CHANGE which item? (1-4) NONE//: 
```

Figure 2-11: Display of patient-specified Gender Identity(s) when OTHER is used

The **DECLINED TO ANSWER** and **DO NOT KNOW** options are exclusive and cannot be combined with any other ethnicity selection. When **DECLINED TO ANSWER** or **DO NOT KNOW** are selected and the patient has other gender identity that were previously entered, then you will see a prompt asking if you would like to keep or remove the **DECLINED TO ANSWER** or the **DO NOT KNOW** entry.

For example, when **Keep DECLINED TO ANSWER** is selected, this will remove all gender identity previously entered on the patient’s record and replace them with the **DECLINED TO ANSWER** selection.
Select Gender Identity(s): TRANSGENDER FEMALE// DECLINED TO ANSWER  ASKU
A) Keep DECLINED TO ANSWER
B) Remove DECLINED TO ANSWER
Select one of the following: A  Keep DECLINED

Figure 2-12: Example of prompt to keep Declined to Answer

When Remove DECLINED TO ANSWER is selected, this will keep all gender identities previously entered on the patient record and will not add the DECLINED TO ANSWER selection.

Select Gender Identity(s): TRANSGENDER FEMALE// DECLINED TO ANSWER  ASKU
A) Keep DECLINED TO ANSWER
B) Remove DECLINED TO ANSWER
Select one of the following: b  Remove DECLINED

Figure 2-13: Example of prompt to remove Declined to Answer

2.2.1.4 Sexual Orientation

Sexual orientation has three main dimensions: sexual identity, sexual attraction, and sexual behavior.

- Sexual identity refers to the way a person self-identifies with a given sexual orientation.
- Sexual attraction refers to the individuals to whom a person is physically and/or emotionally attracted.
- Sexual behavior refers to the gender(s) of the individuals with whom that person engages in sexual activity.

The most commonly used terms to describe different sexual orientations are lesbian, gay, bisexual, and straight/heterosexual. Because of the complexity of sexual orientation, some surveys focus only on sexual identity while others measure all three components.

To update the sexual orientation, proceed to Page 11 and edit question #4:

1. Type the sexual orientation provided by the patient and press Enter.

2. The system will display the sexual orientation of the patient.
4. SEXUAL ORIENTATION.........:

Select Sexual Orientation(s): ??
You may enter a new SEXUAL ORIENTATION, if you wish
Enter the Sexual Orientation(s) provided by the patient. If the patient does not know or chooses not to disclose, that should be the only response entered. If the patient specifies Sexual Orientation(s) not listed, select the Other entry and enter the response in the free-text field.

Choose from:
BISEXUAL        BI
DECLINED TO ANSWER        ASKU
DO NOT KNOW        UNK
LESBIAN / GAY / HOMOSEXUAL        LGH
SOMETHING ELSE        OTH
STRAIGHT / HETEROSEXUAL        HET

Select Sexual Orientation(s):

Figure 2-14: Adding a Sexual Orientation to Page 11

Some of the characteristics of this new field include:

- This is not a required field. If the patient chooses not to answer, the field may be left blank.
- Answer with DECLINED TO ANSWER if the patient refuses or declines to answer. This is to prevent the patient from being asked again.
- Multiple instances of sexual orientation may be entered. The patient may always have the ability to update this if needed for future visits. If the sexual orientation is no longer valid or has been entered on accident, the entry may be deleted by typing Shift+2 or the “@” sign.

**Entering Patient-specified Sexual Orientation(s) Using SOMETHING ELSE**

Although a commonly used set of sexual orientations have been added for the user to select from, the patient may have a different way of identifying their sexual orientation. To identify the patient’s sexual orientation(s) not included in this set, select the SOMETHING ELSE entry:

After SOMETHING ELSE has been selected, the system will display the Other Sexual Orientation field. Enter the sexual orientation(s) provided by the patient in this free-text field, separating multiple entries (if present) with a comma, up to a maximum of 50-characters and press Enter.
Change which item? (1-4) NONE//: 4
Select Sexual Orientation(s): BISEXUAL// SOMETHING ELSE OTH
Other Sexual Orientation: ??
Enter the specific Sexual Orientation(s) provided by the patient. This free-text field enables a patient to specify Sexual Orientation(s) not listed in the distributed code set.

Other Sexual Orientation: TWO-SPIRIT

Figure 2-15: Selecting SOMETHING ELSE and adding patient-specified Sexual Orientation(s)

Once the entry has been added, the field will display with the patient-defined sexual orientation(s). The display will include (OTH) next to the entry to indicate the patient’s response was entered as free-text.

The DECLINED TO ANSWER and DO NOT KNOW options are exclusive and cannot be combined with any other sexual orientation selection. When DECLINED TO ANSWER or DO NOT KNOW are selected and the patient has other sexual orientations that were previously entered, then you will see a prompt asking if you would like to keep or remove the DECLINED TO ANSWER or the DO NOT KNOW entry.

For example, when Keep DECLINED TO ANSWER is selected, this will remove all sexual orientation previously entered on the patient’s record and replace them with the DECLINED TO ANSWER selection.
2.3 New Option in the Edit One of the Patient’s Pages Menu

With the addition of **Page 11 – Sexual Orientation/Gender Identity** to the Registration Editor, the option that allows direct entry into individual pages has been updated to allow access to edit the page. This option is called **PAG – Edit One of the Patient’s Pages**.

---

**INDIAN HEALTH HOSPITAL**

Edit one of the Patient's PAGEs

*** NOTE: IF YOU EDIT A PATIENT AND SEE THEIR NAME IN REVERSE VIDEO ***
*** WITH '(RHI)' BLINKING NEXT TO IT, IT MEANS THEY HAVE RESTRICTED ***
*** HEALTH INFORMATION ***

P1 PAGE1 - Elig/Identifiers
P2 PAGE2 - Religion/Tribal Data/Employment
P3 PAGE3 - Emerg Contact/Next of Kin
P4 PAGE4 - Insurance Summary
P5 PAGE5 - Benefit Coordinator
P6 PAGE6 - Veteran's Information
P7 PAGE7 - Death Info/Other Names
P8 PAGE8 - Additional Registration Info
P9 PAGE9 - Document Summary
P10 PAGE10 - Other Patient Data
P11 PAGE11 - Sexual Orientation/Gender Identity

Select Edit one of the Patient's PAGEs <TEST ACCOUNT> Option:
To access the page from PAG, the user will need to be assigned the AGZEDITPAGE11 key. Work with your RPMS Administrator to properly request and assign this key.

2.4 Preferred Name

New functionality has been added that allows the patient to provide a preferred name. The preferred name is the “first name” only that the patient has specified they wish to be called. It is often used if the preferred first name is different from their legal first name. Common uses of a preferred name could be a nickname, middle name, or, if the patient has a first name that they wish to use. If the patient provides a preferred name, the patient should be addressed by that name during their encounter with the staff at the medical facility.

A new field has been added to Page 7 of the Registration Editor. This new field is question #5 and labeled **Preferred Name**. Some of the characteristics of the new field include:

- This is not a required field. If the patient does not have a preferred name, an entry does not need to be added.
- The entry must not exceed 30-characters and must have at least two characters to complete the preferred name entry.
- The name may be a combination of letters, numbers, and symbols.
- The preferred name entry will display on the banner of the Registration Editor and when the patient is selected within the Patient Registration system. When the name displays, it will be in the format of <NAME> plus an asterisk (*). For example, a preferred name of Mary will display as - MARY*.
- For now, the preferred name will only show up in Patient Registration, but as other applications update their packages, the preferred name will display.
- Regardless of when the application is updated to display the preferred name, the RPMS system uses the patient lookup from the Patient File where the preferred name is stored. This means that the display will contain the preferred name during lookup.

Documents used for billing or other type of forms that print the official name of the patient will not print the preferred name.

Figure 2-20: Patient Lookup in PCC Data Entry when Selecting the Patient Name
To edit the preferred name, proceed to Page 7 and edit question #5. At the “Preferred Name” prompt, type the name that the patient has provided.

Once entered, the system will display the preferred name, both on question #5 and on the banner of the Registration editor.
2.4.1 Selecting the Patient to Edit or View after the Preferred Name Is Entered

If a preferred name entry has been added to the patient’s record, you will also be able to search for the patient using their “lastname, preferred name” similar to searching for a patient using their alias name.

Once the patient record is located, the user will be notified when they view the patient’s electronic file that a preferred name is available. The notification will appear next to the patient’s name with a **dash** plus the **preferred name** along with an asterisk (*).

![Image of patient record with preferred name](image)

**Figure 2-24: Display of Preferred Name when editing a patient’s record**

The banner of the Registration Editor will also display the preferred name in the same format of dash, preferred name, then asterisk (*).
16. LOCATION OF HOME:
--------------------------------------------------------------------------------
17. PHONE NUMBER [RESIDENCE]: 555 555-5555  18. WORK PHONE: 555 555-5555
19. OTHER PHONE:
================================================================================
--------------------------------------------------------------------------------
Last edited by: DEMO, USER M on May 04, 2020
================================================================================
CHANGE which item? (1-19) NONE//:

Figure 2-25: Display of the Preferred Name in the banner of the Registration Editor

2.5 Face Sheet Updates

Updates have been made to the Patient Face Sheet to accommodate the Preferred Name and the Birth Sex fields.

If the user selects a patient with a Preferred Name, the name along with the preferred name will display once the patient name was entered.

Figure 2-26: Display of Preferred Name when selecting the patient while printing the Face Sheet

If populated, the Preferred Name will print on the header of the face sheet.
2.6 Race and Ethnicity

2.6.1 Ethnicity Prompt in Add a New Patient

The Ethnicity field has been updated to allow users to enter more than one ethnicity similar to the current Race field. The prompt will display as “Select Ethnicity(s).”

When multiple ethnicities are entered, the face sheet will display MULTIPLE ETHNICITIES.

Select Ethnicity(s): HISPANIC OR LATINO
Are you adding 'HISPANIC OR LATINO' as a new ETHNICITY INFORMATION (the 1ST for this VA PATIENT)? No// Y (Yes)
METHOD OF COLLECTION: SELF IDENTIFICATION/

Select Ethnicity(s): MEXICAN AMERICAN INDIAN
Are you adding 'MEXICAN AMERICAN INDIAN' as a new ETHNICITY INFORMATION (the 2ND for this VA PATIENT)? No// Y (Yes)
METHOD OF COLLECTION: SELF IDENTIFICATION/

Select Ethnicity(s): PUERTO RICAN
Are you adding 'PUERTO RICAN' as a new ETHNICITY INFORMATION (the 3RD for this VA PATIENT)? No// Y (Yes)
METHOD OF COLLECTION: SELF IDENTIFICATION/

Select Ethnicity(s):
COUNTY: BERNALILLO                                      AGE: 50 YRS
CURRENT ADDRESS:                                         
100 MOCKINGBIRD LANE W                                   
ALBUQUERQUE, NEW MEXICO 87999                            
PHONE NUMBERS ---                                      
HOME: 5054789654                                        WORK: 
OTHER PHONE: 
RACE: MULTIPLE RACES SPECIFIED                           
ETHNICITY: MULTIPLE ETHNICITIES                         
PREFERRED LANGUAGE:                                     
PREFERRED METHOD:                                       
NUMBER IN HOUSEHOLD:                                     
TOTAL HOUSEHOLD INCOME: /                               
NOTICE OF PRIVACY PRACTICES REC'D BY PATIENT : YES       
DATE : MAY 20, 2020                                      
ACKNOWLEDGEMENT OF RECEIPT OF NPP SIGNED : YES

Figure 2-29: Example of face sheet with multiple ethnicities

2.6.2 Registration Editor, Page 10: Ethnicity

When multiple ethnicities are entered for a patient, then page 10 will display MORE THAN ONE ETHNICITY for the ethnicity field.

Figure 2-30: Example of page 10 display for multiple ethnicities

If only one ethnicity is specified, that ethnicity will display on page 10 and the face sheet. If user needs to remove a previously entered ethnicity, the entry may be deleted by typing Shift+2 or the “@” sign at each ethnicity prompt.

The DECLINED TO ANSWER and UNKNOWN BY PATIENT options are exclusive and cannot be combined with any other ethnicity selection. When DECLINED TO ANSWER or UNKNOWN BY PATIENT are selected and the patient has other ethnicities that were previously entered, then you will see a prompt asking if you would like to keep or remove the DECLINED TO ANSWER or the UNKNOWN BY PATIENT entry.

For example, when Keep DECLINED TO ANSWER is selected, this will remove all ethnicities previously entered on the patient’s record and replace them with the DECLINED TO ANSWER selection.
Select Ethnicity(s): DECLINED TO ANSWER D
Are you adding 'DECLINED TO ANSWER' as a new ETHNICITY INFORMATION (the 3RD for this VA PATIENT)? No// Y (Yes)
METHOD OF COLLECTION: SELF IDENTIFICATION/
Select Ethnicity(s):
A) Keep DECLINED TO ANSWER
B) Remove DECLINED TO ANSWER
Select one of the following: A Keep DECLINED

Figure 2-31: Example of the “Keep Declined to Answer” prompt

When Remove DECLINED TO ANSWER is selected, this will keep all ethnicities previously entered on the patient record and will not add the DECLINED TO ANSWER selection.

Select Ethnicity(s): DECLINED TO ANSWER D
Are you adding 'DECLINED TO ANSWER' as a new ETHNICITY INFORMATION (the 3RD for this VA PATIENT)? No// y (Yes)
METHOD OF COLLECTION: SELF IDENTIFICATION/
Select Ethnicity(s):
A) Keep DECLINED TO ANSWER
B) Remove DECLINED TO ANSWER
Select one of the following: b Remove DECLINED

Figure 2-32: Example of prompt to remove Declined to Answer

2.6.3 Updates to Ethnicity and Race list

The list of available races and ethnicities have been updated by an associated AUM patch release to include a more granular list that matches the CDC’s Race/Ethnicity code set. Type double question marks (??) to view the entire list of available options. This includes the Ethnicity name and abbreviation if available.

Select Ethnicity(s): ??
You may enter a new ETHNICITY INFORMATION, if you wish Patient's ethnicity

Choose from:
ANDALUSIAN
ARGENTINEAN
ASTURIAN
BELEARIC ISLANDER
BOLIVIAN
CANAL ZONE
CANARIAN
CASTILLIAN
Catalonian
CENTRAL AMERICAN
CENTRAL AMERICAN INDIAN
CHICANO
CHILEAN
COLOMBIAN

Addendum to User Manual
September 2020
Patch 15
24
The available Race entries include the race name, abbreviation if available, and HL7 code.

Select Race(s): ??
You may enter a new RACE INFORMATION, if you wish
Patient's race

Choose from:
AFGHANISTANI 2106-3
AFRICAN 2054-5
AFRICAN AMERICAN 2054-5
AMERICAN INDIAN OR ALASKA NATIVE 3 1002-5
ARAB 2106-3
ARMENIAN 2106-3
ASIAN 2028-9
ASIAN INDIAN 2028-9
ASSYRIAN 2106-3
BAHAMIAN 2054-5
BANGLADESHI 2028-9
BARBADIAN 2054-5
BHUTANESE 2028-9
BLACK 2054-5
BLACK OR AFRICAN AMERICAN            B     2054-5
BOTSWANAN                2054-5
BURMESE                    2028-9
CAMBODIAN                2028-9
CAROLINIAN                2076-8
CHAMORRO                    2076-8
CHINESE                    2028-9
CHUUKESSE                2076-8
DECLINED TO ANSWER      D     0000-0
DOMINICA ISLANDER            2054-5
DOMINICAN                2054-5
EGYPTIAN                    2106-3
ENGLISH                    2106-3
ETHIOPIAN                2054-5
EUROPEAN                   2106-3
FIJIAN                    2076-8
FILIPINO                   2028-9
FRENCH                    2106-3
GERMAN                     2106-3
GUAMANIAN                2076-8
GUAMANIAN OR CHAMORRO       2076-8
HAITIAN                    2054-5
HMONG                     2028-9
INDONESIAN                2028-9
IRANIAN                   2106-3
IRAQI                     2106-3
IRISH                     2106-3
ISRAELI                   2106-3
ITALIAN                   2106-3
IWO JIMAN                2028-9
JAMAICAN                   2054-5
JAPANESE                  2028-9
KIRIBATI                   2076-8
KOREAN                    2028-9
KOSRAEAN                  2076-8
LAOTIAN                   2028-9
LIBERIAN                  2106-3
LIBERIAN                    2054-5
MADAGASCAR                2028-9
MALAYSIAN                2028-9
MALDIVIAN                2028-9
MARIANA ISLANDER        2076-8
MARSHALLESE              2076-8
MELANESIAN              2076-8
MICRONESIAN              2076-8
MIDDLE EASTERN OR NORTH AFRICA   2106-3
NAMIBIAN               2054-5
NATIVE HAWAIIAN            2076-8
NATIVE HAWAIIAN OR OTHER PACIF        H     2076-8
NEPALESE                 2028-9
NEW HEBRIDES             2076-8
NIGERIAN                 2054-5
OKINAWAN                 2028-9
OTHER PACIFIC ISLANDER        2076-8
OTHER RACE             U     2131-1
PAKISTANI                2028-9
PALAUAN                   2076-8
Figure 2-34: Updated display for Races

2.7 Additional Legal Documents for Legal Sex

Some fields in the Patient Registration system require proof from the patient to allow them to make changes to their name, date of birth, gender and address. Usually this proof is documented and copied at the initial time of the patient’s visit but may be updated in later visits if changes occur.

Because of the addition of Page 11 – Sexual Orientation/Gender Identity to the Registration Editor, a new field was added labeled Legal Sex. If the Legal Sex is updated on Page 11, the system requires proof of the legal sex. This proof may be items such as:

- Court Order (LS)
- Physician State Specific Declaration (S)
- State Birth Certificate (NLS)
- State ID (LS)
- State Motor Vehicle Driver’s License (NLS)
If additional documents are needed as proof by the facility, then new entries may be added. The letters that display at the end of the proof name indicate which field may use that proof of change.

- L – means this is used as a Legal Document.
- N – means this is used as a Proof of Name Change.
- A – means this is used for Advance Directives.
- S – means this is used for Proof of Legal Sex. This was introduced in Patch 15.

To add a new document, access Table Maintenance (Reg > TM > AGEM) in Patient Registration:

1. Type two question marks (??) at the “ELIGIBILITY MODIFIERS ENTRY” prompt to scan the existing entries.

2. Review the existing entries to prevent duplication. For example, if the user needs to add the Driver’s License as proof, they would scan and see that the entry exists under “State Motor Vehicle Driver’s License”.

3. If the entry does not exist:
   a. Type the document name that will be added to the list of documents at the ELIGIBILITY MODIFIERS ENTRY field and press Enter.
   b. The system will ask to confirm the entry. Type YES to accept the entry and press Enter.
   c. If needed, type two question marks (??) at the ELIGIBILITY MODIFIERS TYPE field and press Enter.
   d. Review the list to determine how to categorize this new entry.
      - For example, if the entry is needed for proof of name change, type N and press Enter.
      - If the document can be used for more than one type of proof, type the letters of each document type that apply. For example, if the new item is needed for proof of name change (N) and for legal sex (S), then type NS and press Enter.

Select Table Maintenance Menu <TEST ACCOUNT> Option: ADD/EDIT ELIGIBILITY MODIFIERS FILE

ELIGIBILITY MODIFIERS ENTRY: OTHER TYPE OF DOCUMENT
Are you adding 'OTHER TYPE OF DOCUMENT' as a new ELIGIBILITY MODIFIERS (the 57TH)? No//YES (Yes)
ELIGIBILITY MODIFIERS TYPE: ??
Type can reflect eligibility status OR legal documents.
Eligibility Status Types:
'I' FOR INELIGIBLE;
'D' FOR DIRECT ONLY;
'C' FOR CHS & DIRECT;
'P' FOR PENDING VERIFICATION;
Legal Document Types:
'N' FOR NAME CHANGE PROOF;
'L' FOR LEGAL DOCUMENTS;
'A' FOR ADVANCE DIRECTIVE;
'S' FOR LEGAL SEX;

ELIGIBILITY MODIFIERS TYPE: S

Figure 2-35: Adding a New Document Type

4. If the entry exists but the document type needs to be updated to be used for another type. For example, adding Legal Documents type to an entry with a Legal Sex.

a. Type the document name or eligibility modifier and press Enter.

b. The system may ask to validate the entry. Do not change the name unless it needs to be updated. At the “MODIFIER DESCRIPTION” prompt, press Enter.

c. At the “TYPE” prompt, an existing entry will display. Enter all the types you would like to add and press Enter.

Select Table Maintenance Menu <TEST ACCOUNT> Option: ADD/EDIT ELIGIBILITY MODIFYERS FILE

ELIGIBILITY MODIFYERS ENTRY: OTHER TYPE OF DOCUMENT  L
MODIFIER DESCRIPTION: OTHER TYPE OF DOCUMENT  Replace <enter>
TYPE: L//  LS

Figure 2-36: Adding a document type to an existing Eligibility Modifier

Once the entry has been added, confirm the entry by using what was added in the Registration Editor.
**Appendix A  2015 Certified Health IT Standards**

The Office of the National Coordinator (ONC) provides the following guidance for the data sets that were updated in Patient Registration.

This was derived from the 2015 Edition Health IT Certification Criterion, ss170.315(a)(5)(i)(D-E) (Demographics), Sexual Orientation and Gender Identity (SO/GI).

**Common Clinical Data Set**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sex</td>
<td>No associated standard</td>
<td>The standard specified in § 170.207(n)(1) – Birth sex must be coded in accordance with HL7 Version 3 (V3) Standard, Value Sets for AdministrativeGender and NullFlavor attributed as follows: (1) Male. M (2) Female. F (3) Unknown. nullFlavor UNK</td>
</tr>
<tr>
<td>Preferred Language</td>
<td>The standard specified in § 170.207(g)(1) – As specified by the Library of Congress, ISO 639-2 alpha-3 codes limited to those that also have a corresponding alpha-2 code in ISO 639-1.</td>
<td>The standard specified in § 170.207(g)(2) – Request for Comments (RFC) 5646.</td>
</tr>
</tbody>
</table>
# Acronym List

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Term Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAH</td>
<td>Critical Access Hospital</td>
</tr>
<tr>
<td>CDC</td>
<td>Centers for Disease Control</td>
</tr>
<tr>
<td>CEHRT</td>
<td>Certified EHR Technology</td>
</tr>
<tr>
<td>CMS</td>
<td>Centers for Medicare and Medicaid Services</td>
</tr>
<tr>
<td>EHR</td>
<td>Electronic Health Record</td>
</tr>
<tr>
<td>HL7</td>
<td>Health Level 7</td>
</tr>
<tr>
<td>IHS</td>
<td>Indian Health Service</td>
</tr>
<tr>
<td>IT</td>
<td>Information Technology</td>
</tr>
<tr>
<td>LGBT</td>
<td>Lesbian, Gay, Bisexual, Transgender</td>
</tr>
<tr>
<td>ONC</td>
<td>Office of the National Coordinator</td>
</tr>
<tr>
<td>RPMS</td>
<td>Resource and Patient Management System</td>
</tr>
<tr>
<td>SOGI</td>
<td>Sexual Orientation Gender Identity</td>
</tr>
<tr>
<td>UDS</td>
<td>Uniform Data System</td>
</tr>
</tbody>
</table>
Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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