



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Referred Care Information System (RCIS) (BMC)

Installation Guide and Release Notes

Version 4.0
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Information Technology Support Center
Division of Information Resources
Albuquerque, New Mexico

PREFACE

The Referred Care Information System (RCIS) is a group of computer programs that automate the clinical and administrative management of all referred care, including in-house referrals, referrals to other IHS facilities, and referrals to outside contract providers. Information entered to the system provides timely and accurate referral data on individuals and groups of patients for the key clinical and administrative managers at care delivery sites, IHS Areas, and IHS Headquarters. By tracking this information, RCIS helps ensure that referred care services are appropriate, effective, of high quality, and provided at fair and reasonable prices.

SECURITY

This package does not impose any additional legal requirements on the user, nor does it relieve the use of any legal requirements. Names and social security numbers used in the examples are fictitious.

This package requires *access* and *verify* codes to access the system. These can be obtained from your supervisor or site manager. In addition, security keys are assigned with your access codes. They are required to perform certain options in the Referred Care Information System application. Some options within the application are “locked” (i.e. the user is unable to access the option without the appropriate security key).

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1.0 Release Notes

This is a new version of RCIS. If RCIS is already installed, the current version of RCIS should be at v3.0.

Description of the changes made in v4.0

- **Secondary Referrals:**
 - Moved Secondary referrals to RCIS Referral file
 - Moved Secondary Medical HX comments to RCIS Comments file
 - Modified numerous routines to filter Secondary Referral from Options
 - Secondary Referral can be displayed using the Display Referral option
 - Reports:
 - Added Secondary Referral information to the Administrative Reports
 - Secondary Referral can now be selected in the General Retrieval Reports option
 - Combined Secondary Referral information with in the Utilization Reports
 - Display Secondary Referral information in the Case Management Reports
 - Letters:
 - Added option to print Primary Medical HX on letter
 - Added the date, priority and referral type to print on letter
 - Added new fields:
 - Admission Date, Priority, Type, Local Category, and Status
 - Secondary Referral can be selected when entering a CHS PO or Denial
 - CHS information can be entered in the Secondary Referral
- **Reports:**
 - Added Date Range selection to Administrative Reports
 - Added Browse function to Administrative Reports
 - Changed HRN to Ref # on CHS Reports
 - Sub-totals on In-House Referral Reports
 - Removed the CHS Denial Still Active Report
 - Added Call-Ins Only and Case Com Dt to General Retrieval Report
 - Added Patient Eligibility Status on RRR Report

- **Default on Mod:**
 - Option 2: All Data changed to "Q"
- **Review Comments for MD/MCC option:**
 - Changed selection to Ref#, Patient, or Date Entered
- **Site Parameter for CHS, if link is Yes:**
 - Added option to automatically close referral for denials linked to Referrals
 - Added option to allow entry of CHS POs without a referral
- **Print User Who Entered Comments Only:**
 - Date stamp was printing
- **View Face Sheet and HS:**
 - Default to "No" after viewing
 - Added options to Secondary Referral template and Clinicians template
- **Closing a Referral:**
 - Removed C2, and changed all C2 entries to "X"
 - Added Unknown and Other to Reasons
 - If Other is entered a comment can be entered
- **Edit Menu:**
 - New option to send MailMan message to Referring Provider and Primary care Provider
- **Miscellaneous routine modifications**

Note: For a complete description of changes see the RCIS User Manual.

2.0 Installation Notes

Prefix: BMC

Current Version: 4.0

Warning: Read entire notes file prior to attempting any installation.

2.1 General Information

- Typical time for the install is 30 minutes.
- Make a copy of this distribution for offline storage.
- Print all notes/readme files.
- It is recommended that the terminal output during the installation be captured using an auxport printer attached to the terminal at which you are performing the software installation. This will insure a printed audit trail if any problems should arise.

2.2 Contents of Distribution

- bmc_0400.k KIDS formatted Distribution File
- bmc_040i.pdf Installation Guide
- bmc_040t.pdf Technical Manual
- bmc_040u.pdf User Manual

2.3 Required Resources

- Referred Care Info System v3.0
 - RCIS Parameter File: The CHS Supervisor must be entered for all facilities in the RCIS parameter file
 - New Install will not need any previous versions of RCIS
- VA FileMan v21 or higher
- VA Kernel v8 or higher
- IHS Dictionaries (Patient) (AUPN) v99.1 Patch 15

- Taxonomy Package (ATX) v5.1 Patch 8
- Patient Registration (AG) v7.1

3.0 Installation Instructions

Disable the RCIS Menu or RCIS user accounts.

1. Save all BMC routines (i.e. D ^%RS or D ^%RO).
2. D ^%RDEL or D ^%RDELETE of BMC*.
3. Save BMC Globals (i.e. D ^%GO or D ^%GS).
4. Confirm the CHS Supervisor Site Parameter field is defined.
5. This is a KIDS Install. Use the Installation options on the KIDS menu.
6. Load the Distribution into KIDS using option 1 on the KIDS Installation menu. The distribution was released in a file named bmc_0400.k.
7. Verify the load using option 2 on the KIDS Installation menu.
8. Consider using options 3 and 4 on the KIDS Installation menu, print and compare the Transport.
9. Install the distribution using option 6 on the Installation menu.
10. For results, read the generated MailMan message, or use the KIDS "Install File Print" option to view/print the "BMC 4.0" entry.
11. Answer Yes to Want KIDS to Rebuild Menu Trees Upon Completion of Install?
12. Answer No to Want KIDS to INHIBIT LOGONs during the install?
13. The post-install routine, BMC4P0, will deliver a patch installation mail message to local users that hold the BMCZMENU, XUMGR, XUPROG, or XUPROGMODE security key.
14. The post routine will also remove BO, Discharge notes and Med HX from the RCIS Referral file, they were moved to the RCIS Comments file in v3, the RCIS Secondary Referral file entries will be moved the RCIS Referral file, the closed status of "C2 will be changed to "X".
15. Set new site parameters:
 - a. Require a Referral on All CHS POs? (*Note parameter will not be activated until CHS patch 13 is installed*)
 - b. CHS Denial will close outpatient referrals?

4.0 Sample Installation

```
D^XPDKRN

KIDS 8.0

Select KIDS OPTION: LOAD A DISTRIBUTION
Enter a Host File: c:\pub\bmc_0400.k

KIDS Distribution saved on Oct 4, 2005@15:24
Comment: RCIS Version 4.0

This Distribution contains Transport Globals for the following Package(s):
  BMC 4.0
Distribution OK!

Want to Continue with Load? YES//
Loading Distribution...

Build BMC 4.0 has an Enviromental Check Routine
Want to RUN the Environment Check Routine? YES//
  BMC 4.0
Will first run the Environment Check Routine, BMC4P0

                                Hello, ADAM ADAM

                                Checking Environment for REFERRED CARE INFO SYSTEM v.4.0.
                                Need at least BMC v 3.0.....BMC v 3.00 Present
                                Need at least XU v 8.0.....XU v 8.0 Present
                                Need at least DI v 21.0.....DI v 22.0 Present
                                Need at least ATX v 5.1.....ATX v 5.1 Present
                                Need at least AUPN v 99.1.....AUPN v 99.1 Present

                                ENVIRONMENT OK.

Enter RETURN to continue or '^' to exit:

In this distribution:
(1) Secondary Referrals
    a. Moved Secondary referrals to RCIS Referral file
    b. Moved Secondary Med Hx comments to RCIS Comments file
    c. Modified numerous routines to filter Sec Ref from options
    d. Sec Ref can be displayed using the Display Referral option
    e. Reports:
        1. Added Sec Ref information to the Adm reports
        2. Sec Ref can now be selected in the General Retrieval
           Reports Option
        3. Combined Sec Ref info with in the Utilization reports
        4. Display Sec Ref info on the Case Management Reports
    f. Letters added option to print Prim Med HX on letter, also
       added the date, priority and ref type to print on letter
    g. Added new fields, amt date, priority, type, local category
       and status
    h. Sec Ref can be selected when entering a CHS PO or Denial
    i. CHS info can be entered for the Sec Ref
(2) Reports
    a. Added date range selection to Adm reports
```

- b. Added Browse function to Adm reports
 - c. Changed HRN to Ref # on CHS reports
 - d. Sub-totals on Inhouse referral reports
 - e. Removed the CHS Denial still active report
 - f. Added call-ins only and Case com dt to Gen Ret report
 - g. Added Pat elig status on RRR report
 - (3) Default on Mod option 2 All Data changed to "Q"
 - (4) Review Comments for MD/MCC option changed selection to ref #, Patient or date entered
 - (5) Site Parameter for CHS, if link is Yes
 - a. Added option to auto close ref for denials linked to Ref
 - b. Added option to allow entry of CHS PO's without a referral
 - (6) Print user who entered comments only Date stamp was printing
 - (7) View face sheet and HS default to "No" after viewing, also added options to Sec Ref template and Clinicians template
 - (8) Closing a ref, removed C2, changed all C2 entries to X and added Unknown and other to reasons, if Other is entered a comment can be entered.
 - (9) New option under edit menu to send Mailman message to Referring Provider and Primary care Provider.
 - (10) Miscellaneous routine modifications
- Note: for complete discription of changes see RCIS User Manual

Enter RETURN to continue or '^' to exit:
Use INSTALL NAME: BMC 4.0 to install this Distribution.

[PRD,FSA]>d^XPKRN

KIDS 8.0

Select KIDS OPTION: INSTALL PACKAGE(S)
Select INSTALL NAME: BMC 4.0 Loaded from Distribution Loaded from
Distribution 10/4/05@15:47:57
=> RCIS Version 4.0 ;Created on Oct 04, 2005@15:24

This Distribution was loaded on Oct 04, 2005@15:47:57 with header of
RCIS Version 4.0 ;Created on Oct 04, 2005@15:24
It consisted of the following Install(s):
BMC 4.0

Checking Install for Package BMC 4.0
Will first run the Environment Check Routine, BMC4P

Hello, ADAM ADAM

Checking Environment for REFERRED CARE INFO SYSTEM v 4.0.
Need at least BMC v 3.0.....BMC v 3.00 Present
Need at least XU v 8.0.....XU v 8.0 Present
Need at least DI v 21.0.....DI v 22.0 Present
Need at least ATX v 5.1.....ATX v 5.1 Present
Need at least AUPN v 99.1.....AUPN v 99.1 Present

ENVIRONMENT OK.

Enter RETURN to continue or '^' to exit:

- In this distribution:
- (1) Secondary Referrals
 - a. Moved Secondary referrals to RCIS Referral file

- b. Moved Secondary Med Hx comments to RCIS Comments file
 - c. Modified numerous routines to filter Sec Ref from options
 - d. Sec Ref can be displayed using the Display Referral option
 - e. Reports:
 - 1. Added Sec Ref information to the Adm reports
 - 2. Sec Ref can now be selected in the General Retrieval Reports Option
 - 3. Combined Sec Ref info with in the Utilization reports
 - 4. Display Sec Ref info on the Case Management Reports
 - f. Letters added option to print Prim Med HX on letter, also added the date, priority and ref type to print on letter
 - g. Added new fields, amt date, priority, type, local category and status
 - h. Sec Ref can be selected when entering a CHS PO or Denial
 - i. CHS info can be entered for the Sec Ref
 - (2) Reports:
 - a. CHS info can be entered for the Sec Ref
 - b. Added Browse function to Adm reports
 - c. Changed HRN to Ref # on CHS reports
 - d. Sub-totals on Inhouse referral reports
 - e. Removed the CHS Denial still active report
 - f. Added call-ins only and Case com dt to Gen Ret report
 - g. Added Pat elig status on RRR report
 - (3) Default on Mod option 2 All Data changed to "Q"
 - (4) Review comments for MD/MCC option changed selection to ref #, Patient or date entered
 - (5) Site Parameter for CHS, if link is Yes
 - a. Added option to auto close ref for denials linked to Ref
 - b. Added option to allow entry of CHS PO's without a referral
 - (6) Print user who entered comments only Date stamp was printing
 - (7) View face sheet and HS default to "No" after viewing, also added options to Sec Ref template and Clinicians template
 - (8) Closing a ref, removed C2, changed all C2 entries to X and added Unknown and other to reasons, if Other is entered a comment can be entered.
 - (9) New option under edit menu to send Mailman message to Referring Provider and Primary care Provider.
 - (10) Miscellaneous routine modifications
- Note: for complete discription of changes see RCIS Users Manual

Enter RETURN to continue or '^' to exit:

A standard message will be produced by this update.

If you run interactively, results will be displayed on your screen, as well as in the mail message and the entry in the INSTALL file. If you queue to TaskMan, please read the mail message for results of this update, and remember not to Q to the HOME device.

Enter RETURN to continue or '^' to exit:

Install Questions for BMC 4.0

Incoming Files:

90001 RCIS REFERRAL

Note: You already have the 'RCIS REFERRAL' File.

90001.01 RCIS DIAGNOSIS

Note: You already have the 'RCIS DIAGNOSIS' File.

90001.02 RCIS PROCEDURE

Note: You already have the 'RCIS PROCEDURE' File.

90001.03 RCIS COMMENTS

Note: You already have the 'RCIS COMMENTS' File.

90001.32 RCIS ROUTINE REFERRAL DEF

Note: You already have the 'RCIS ROUTINE REFERRAL DEF' File.

90001.33 RCIS OUTPUT FORM DEFINITION (including data)

Note: You already have the 'RCIS OUTPUT FORM DEFINITION' File
I will OVERWRITE your data with mine.

90001.04 RCIS SECONDARY REFERRAL

Note: You already have the 'RCIS SECONDARY REFERRAL' File.

90001.51 RCIS ICD DIAGNOSTIC CATEGORY (including data)

Note: You already have the 'RCIS ICD DIAGNOSTIC CATEGORY' File.
I will OVERWRITE your data with mine.

90001.52 RCIS CPT PROCEDURE CATEGORY (including data)

Note: You already have the 'RCIS CPT PROCEDURE CATEGORY' File.
I will OVERWRITE your data with mine.

90001.53 RCIS SPECIFIC PROVIDER

Note: You already have the 'RCIS SPECIFIC PROVIDER' File.

90001.54 RCIS LOCAL SERVICE CATEGORY

Note: You already have the 'RCIS LOCAL SERVICE CATEGORY' File.

90001.55 RCIS MANAGED CARE COMM ACTION

Note: You already have the 'RCIS MANAGED CARE COMM ACTION' File.

90001.56 RCIS LOCAL UTIL REV BY MD CODES

Note: You already have the 'RCIS LOCAL UTIL REV BY MD CODES' File.

90001.57 RCIS MESSAGES

Note: You already have the 'RCIS MESSAGES' File.

90001.81 RCIS REPORT LISTER ITEMS (including data)

Note: You already have the 'RCIS REPORT LISTER ITEMS' File.
I will OVERWRITE your data with mine.

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90001.82 RCIS REPORT LISTER TEMP FILE
Note: You already have the 'RCIS REPORT LISTER TEMP FILE' File.

90001.83 RCIS ALTERNATE RESOURCE
Note: You already have the 'RCIS ALTERNATE RESOURCE' File.

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//

Want KIDS to INHIBIT LOGONs during the install? YES// NO

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//

Install Started for BMC 4.0 :
      Oct 04, 2005@15:49:14

Build Distribution Date: Oct 04, 2005

Installing Routines: Oct 04, 2005@15:50:30

Running Pre-Install Routine: PRE^BMC4P0

Saving current DD AUDIT settings for files in this patch
and turning DD AUDIT to 'Y'.
File          90001 - RCIS REFERRAL          - DD audit was 'N'
                                     Set to 'Y'
File          90001.01 - RCIS DIAGNOSIS      - DD audit was 'N'
                                     Set to 'Y'
File          90001.02 - RCIS PROCEDURE      - DD audit was 'N'
                                     Set to 'Y'
File          90001.03 - RCIS COMMENTS       - DD audit was 'N'
                                     Set to 'Y'
File          90001.31 - RCIS SITE PARAMETER - DD audit was 'N'
                                     Set to 'Y'
File          90001.32 - RCIS ROUTINE REFERRAL DEF - DD audit was 'N'
                                     Set to 'Y'
File          90001.33 - RCIS OUTPUT FORM DEFINITION - DD audit was ''
                                     Set to 'Y'
File          90001.51 - RCIS ICD DIAGNOSTIC CATEGORY - DD audit was 'N'
                                     Set to 'Y'
File          90001.52 - RCIS CPT PROCEDURE CATEGORY - DD audit was 'N'
                                     Set to 'Y'
File          90001.53 - RCIS SPECIFIC PROVIDER - DD audit was 'N'
                                     Set to 'Y'
File          90001.54 - RCIS LOCAL SERVICE CATEGORY - DD audit was 'N'
                                     Set to 'Y'
File          90001.55 - RCIS MANAGED CARE COMM ACTION - DD audit was 'N'
                                     Set to 'Y'
File          90001.56 - RCIS LOCAL UTIL REV BY MD CODES- DD audit was 'N'
                                     Set to 'Y'
File          90001.57 - RCIS MESSAGES       - DD audit was ''
                                     Set to 'Y'
File          90001.81 - RCIS REPORT LISTER ITEMS - DD audit was ''
                                     Set to 'Y'

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File      90001.82 - RCIS REPORT LISTER TEMP FILE - DD audit was 'N'
                        Set to 'Y'
File      90001.83 - RCIS ALTERNATE RESOURCE      - DD audit was 'N'
                        Set to 'Y'
DD AUDIT settings saved in ^XTMP(.

Med Hx, BO and Discharge comments were moved in v3.0.

BEGIN deleting duplicate Med Hx, BO and Discharge comments..
COMPLETED deletion of Med Hx, BO and Discharge comments.

BEGIN Removing fields from RCIS data dictionary.
  Deleting 'PERTINENT MED HX & FINDINGS...' from 'RCIS REFERRAL'
  Deleting 'BUSINESS OFFICE/CHS COMMENTS..' from 'RCIS REFERRAL'
  Deleting 'DISCHARGE NOTES.....' from 'RCIS REFERRAL'
END Removing deleted fields from RCIS data dictionary.

Installing Data Dictionaries: Oct 04, 2005@15:55:46

Installing Data: .
                Oct 04, 2005@15:55:56

Installing PACKAGE COMPONENTS:

Installing HELP FRAME
Installing BULLETIN
Installing SECURITY KEY
Installing PRINT TEMPLATE
Installing SORT TEMPLATE
Installing INPUT TEMPLATE
Installing FORM
Installing PROTOCOL
Installing LIST TEMPLATE
Installing OPTION Oct 04, 2005@15:57:37

Running Post-Install Routine: POST^BMC4P0

Moving Secondary Referrals to RCIS Referral file.
COMPLETED Moving Secondary Referrals.

Change the close status of referral from 'C2' to 'X'..
Completed changing the close status of referral.

BEGIN Removing CHS Denial report option.
  CHS Denial Referral Report Option Removed
END Removing CHS Denial Report Referral option.

Restoring DD AUDIT settings for RCIS files.
File      90001 - RCIS REFERRAL - DD AUDIT Set to 'N'
File      90001.01 - RCIS DIAGNOSIS - DD AUDIT Set to 'N'
File      90001.02 - RCIS PROCEDURE - DD AUDIT Set to 'N'
File      90001.03 - RCIS COMMENTS - DD AUDIT Set to 'N'
File      90001.31 - RCIS SITE PARAMETER - DD AUDIT Set to 'N'
File      90001.32 - RCIS ROUTINE REFERRAL DEF - DD AUDIT Set to 'N'
File      90001.33 - RCIS OUTPUT FORM DEFINITION - DD AUDIT Set to ''
File      90001.51 - RCIS ICD DIAGNOSTIC CATEGORY - DD AUDIT Set to 'N'
File      90001.52 - RCIS CPT PROCEDURE CATEGORY - DD AUDIT Set to 'N'
File      90001.53 - RCIS SPECIFIC PROVIDER - DD AUDIT Set to 'N'
File      90001.54 - RCIS LOCAL SERVICE CATEGORY - DD AUDIT Set to 'N'

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File      90001.55 - RCIS MANAGED CARE COMM ACTION - DD AUDIT Set to 'N'
File      90001.56 - RCIS LOCAL UTIL REV BY MD CODES- DD AUDIT Set to 'N'
File      90001.57 - RCIS MESSAGES                    - DD AUDIT Set to 'N'
File      90001.81 - RCIS REPORT LISTER ITEMS          - DD AUDIT Set to ''
File      90001.82 - RCIS REPORT LISTER TEMP FILE     - DD AUDIT Set to 'N'
File      90001.83 - RCIS ALTERNATE RESOURCE          - DD AUDIT Set to 'N'
DD AUDIT settings restored.

BEGIN Delivering MailMan message to select users.....
END Delivering MailMan message to select users.

Updating Routine file...

Updating KIDS files...

BMC 4.0 Installed.
      Oct 07, 2005@06:57:13

NO Install Message sent

Call MENU rebuild                               Rebuilding Menus

Starting Menu Rebuild:  Oct 07, 2005@06:58:17

Collecting primary menus in the New Person file...

                Primary menus found in the New Person file
                -----
OPTION NAME      MENU TEXT                # OF      LAST      LAST
                   USERS        USED        BUILT
AKMOEVE          IHS Kernel                13        10/25/05  03/23/05
AKMOCORE         IHS CORE                   38        10/24/05  03/23/05
AMHMENU          Behavioral Health Informa... 1         06/18/98  03/23/05

Building secondary menu trees....
Merging.... done
Menu Rebuild Complete:  Oct 07, 2005@07:05:25

Install Completed
[PRD,FSA]>
    
```

5.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the ITSC Service Center:

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

Fax: (505) 248-4363

Web: <http://www.rpms.ihs.gov/TechSupp.asp>

Email: ITSCHelp@mail.ihs.gov