



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BPRM)

Patient Registration Module User Manual

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Preface

The Practice Management Application Suite (namespace BPRM) is a browser-accessible graphical user interface (GUI) for the Indian Health Service (IHS) Resource and Patient Management System (RPMS) applications.

BPRM provides for the entry of new patients and editing the records of those already registered at a medical facility. The patient data managed with BPRM is crucial to the third-party billing of patient care. Appropriate caution and checking should be employed to ensure that accurate data is entered into the patient registration system and, subsequently, transmitted to the National Patient Information Resource System (NPIRS).

1.0 Introduction

The Practice Management Application Suite (BPRM) represents a forward step in the streamlining of IHS record and patient management. Through the use of a consistent GUI and module-based architecture, it not only simplifies record and patient management, but also allows for future expansion of the scope and capabilities of the system.

This User Manual describes the use of the BPRM Patient Registration module, registration-related reports provided by the Reports module, and options in the Settings module that affect patient registration. It also describes the Benefits and Prior Authorizations modules. A separate User Manual gives an overview of the BPRM application suite, and individual User Manuals are available for the other modules in the suite.

2.0 System Navigation

The Practice Management Application Suite (BPRM) provides access to a vast array of RPMS information. Entering and accessing that information is done through a consistent interface, primarily the Application Toolbar, the Taskbar, and the Workspace. Refer to the *BPRM Application Overview User Manual* for information about using the BPRM interface.

3.0 Patient Registration

This chapter discusses how to register a new patient, and it provides a brief overview of how to view an existing patient record. Subsequent chapters provide a more detailed description of the various patient registration functions within BPRM.

3.1 Registering a New Patient

To register a new patient, click **Register Patient** (Figure 3-1) in the Application toolbar.

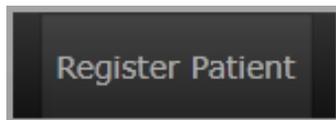


Figure 3-1: Register Patient button

This displays the **Register New Patient** window (Figure 3-2).

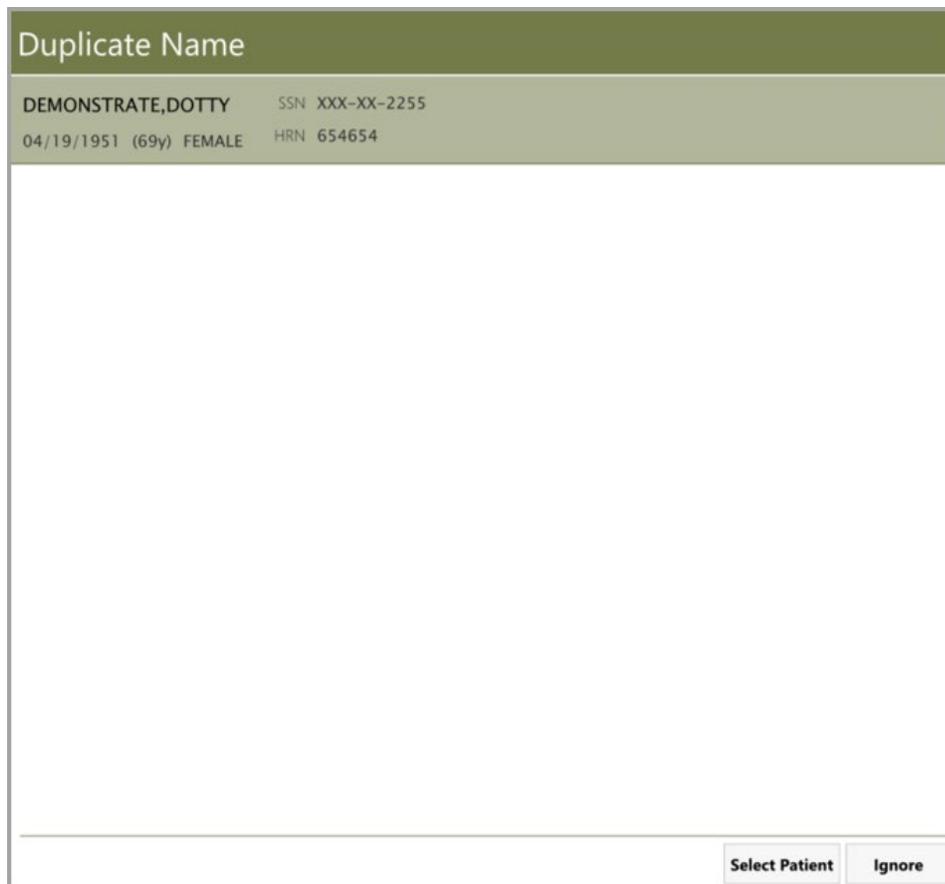
Figure 3-2: Register New Patient window

Required Fields

Most fields containing required information are marked as such. If a required field is left incomplete or blank, it is highlighted with a red outline. Exceptions to this are the Ethnicity and Race fields. They are required, but do not have a red outline. If left blank, a message displays in the bottom left area of the window (see [Ethnicity](#) and [Race](#) below). Patient record information cannot be saved if all required information has not been added.

The **Register New Patient** window provides fields for the following patient information:

- **Last Name** – Type the patient’s last name. This is a required field.
- **First Name** – Type the patient’s first name. This is a required field.
- **Middle Name** – Type the patient’s middle name if known.
 - **Duplicate Name** – When the patient’s name is entered into the name fields, the system searches the database to verify it is not a duplicate. If a duplicate is found, a new window (Figure 3-3) displays listing any duplicate patients.



The screenshot shows a window titled "Duplicate Name" with a light green header. Below the header, the patient's name "DEMONSTRATE, DOTTY" is displayed in bold, followed by "SSN XXX-XX-2255". Below that, the date "04/19/1951 (69y)", gender "FEMALE", and "HRN 654654" are shown. The main area of the window is empty. At the bottom right, there are two buttons: "Select Patient" and "Ignore".

Figure 3-3: **Duplicate Name** window

In this window, click **Select Patient** in the lower-right corner of the page to open the previously registered patient's record or click **Ignore** to return to the new patient record to continue with data entry.

- **Suffix** – Click this field to display the suffix list. The options are:
 - JR
 - SR
 - I
 - II
 - III
- **Date of Birth** – Type the patient's date of birth (DOB).
- **Social Security Number** – Type the patient's Social Security Number (SSN).
 - When the SSN is entered, the system searches the database to verify it is not a duplicate. If a duplicate is found, a window (Figure 3-4) displays listing any duplicate patients and their SSNs.

The screenshot shows a window titled "Duplicate SSN" with a header bar. Below the header, the patient information is displayed in two lines: "DEMONSTRATE, DOTTY SSN XXX-XX-2255" and "04/19/1951 (69y) FEMALE HRN 654654". The main area of the window is empty. At the bottom right, there are two buttons: "Select Patient" and "Ignore".

Figure 3-4: **Duplicate SSN** window

Click **Select Patient** in the lower-right corner of the new window to open the previously registered patient's record or click **Ignore** to return to the new patient record to continue with data entry.

If necessary, you can enter a temporary Social Security Number for the patient called a Pseudo SSN. Type the temporary number with the letter **P** at the end into the **Social Security Number** field (i.e., 123-45-6789P).

Once the form is saved, the system will automatically generate a temporary SSN for the patient based on their initials and date of birth.

- **Reason for No SSN** – Use this field when the **Social Security Number** field is left empty. Click within the field, then choose one of the options shown on the list to populate this field. The options are:
 - Not Available
 - Patient Refused
 - Patient will Submit
- **Health Record Number** – The HRN is a number assigned to each patient by the Medical Records Department (this may vary from site to site). This number can be used as an identifier to edit a patient's file, as well as for billing and tracking of patient care. If the HRN entered is a duplicate of an existing HRN, a warning message displays, and the registration cannot be saved until a non-duplicate HRN is entered.

If necessary, you can enter a temporary HRN. To do so, type the letter **T** along with five numeric digits (i.e., T54321).

- **Primary Language** – To add a primary language, begin typing the first few letters of the language and a list appears to select from.
- **Birth Sex** – Select the patient's sex at the time of birth from the list. The options are:
 - FEMALE
 - MALE
 - UNKNOWN
- **Marital Status** – Select the patient's marital status from the list. The options are:
 - DIVORCED
 - MARRIED
 - NEVER MARRIED
 - SEPARATED

- SINGLE
- UNKNOWN
- WIDOW/WIDOWER
- **Ethnicity** – Select the patient’s ethnicity (Figure 3-5). Click the field to view the extensive list (use the scroll bar to view the full list).

Note: Ethnicity is a required field. If left blank, the following message displays in the bottom left of the window in red: *“Ethnicity is a required field.”*

Ethnicity	[required]	Collection Method	[required]		
PERUVIAN	▼	SELF IDENTIFICATION	▼	Remove	
ASTURIAN	▼	PROXY	▼	Remove	
CENTRAL AMERICAN	▼	OBSERVER	▼	Remove	Add Ethnicity

Figure 3-5: Ethnicity Selection fields

- **Collection Method** – Use this field to select the method used for determining the ethnicity selection. The default is **Self Identification**. The choices are:
 - **OBSERVER**
 - **PROXY**
 - **SELF IDENTIFICATION**
 - **UNKNOWN**
- **Add Ethnicity** – Multiple ethnicities can be added to a patient record. Click **Add Ethnicity** to open a new **Ethnicity** field. Select another ethnicity from the list.

Note: The same ethnicity cannot be selected more than once. If this happens, the following message displays: *“You cannot have the same ethnicity more than once.”*

- **Remove** – Click **Remove** to remove any of the existing ethnicities.
- **Unknown by Patient** – The patient does not know their ethnicity.
- **Declined to Answer** – The patient has declined to provide ethnicity information.

Note: If **Unknown by Patient** or **Declined to Answer** are selected in any **Ethnicity** field, when attempting to add another ethnicity and **Add Ethnicity** is clicked, the system displays the following message in red and the new ethnicity is not added: *“If ethnicity is unknown or declined to answer, no other ethnicity can be selected.”*

- **Race** – Use this field to select the patient’s race. Click within the field to view the list (use the scroll bar to view the full list). Select one of the options.

Note: Race is a required field. If left blank, the following message displays in the bottom left of the window in red: “Race is a required field.”

- **Add Race** – Multiple races can be added to a patient record. Click **Add Race** to open a new **Race** field. Select another race from the list.

Note: The same race cannot be selected more than once. If this happens, the following message displays: *“You cannot have the same race more than once.”*

- **Collection Method** – Use this field to select the method used for determining the race selection. The default is **Self Identification**. The choices are:
 - **OBSERVER**
 - **PROXY**
 - **SELF IDENTIFICATION**
 - **UNKNOWN**
- **Remove** – Click **Remove** to remove any of the existing ethnicities.
- **Unknown by Patient** – The patient does not know their ethnicity.
- **Declined to Answer** – The patient has declined to provide ethnicity information.

Note: If **Unknown by Patient** or **Declined to Answer** are selected in the **Race** field, when attempting to add another race, the system displays the following message in red and the new race is not added: *“If race is unknown or declined to answer, no other race can be selected.”*

- **Location of Home** – This is a free-text field where the user can supply directions to a patient’s home.
- **Classification/Beneficiary** – Select the patient or beneficiary’s classification. Click in the field and a list displays.

- **Eligibility Status** – Select the patient’s eligibility status. Click in the field to display a list.
- **Indian Blood Quantum** – Provide the patient’s percentage of Indian blood. Users can enter both text (Full, F, N, None) and fractions (1/2, 1/4, 1/16).

Note: If a whole number is typed in, the following message displays in red: *“Indian Blood Quantum is not in the correct format. The correct format is a fraction (ex. 1/1).”*

- **Tribal Membership** – Provide the patient’s tribe membership. Must be completed if a quantum is specified. Type the first few letters of the tribe name and a list displays.

Note: If Tribal Membership is left blank, the following message displays in red: *“Tribe of Membership is required if Any Quantum is specified.”*

- **Tribe Quantum** – Provide the tribe’s percentage of Indian blood. Users can enter both text (Full, F, N, None) and fractions (1/2, 1/4, 1/16).

Note: If a whole number is typed in, the following message displays in red: *“Tribe Quantum is not in the correct format. The correct format is a fraction (ex. 1/1).”*

- **Tribal Enrollment Number** – Provide the patient’s tribal enrollment number.
- **Street Address** – Provide the patient’s current street address.
- **City** – Provide the patient’s current city.
- **State** – Provide the patient’s current state.
- **Zip Code [Accepts Zip+4]** – Provide the patient’s city zip code.
- **Present Community** – Provide the patient’s present residence community.
- **Date Moved** – Provide the patient’s move date if applicable.
- **Home Phone** – Provide the patient’s home phone number.
- **Work Phone** – Provide the patient’s work phone number.
- **Place of Birth [City]** – Provide the city where the patient born.
- **Place of Birth [State]** – Provide the state where the patient born.

3.1.1 Save Button

Once the patient information has been entered, click **Save** (Figure 3-6) to complete the registration.

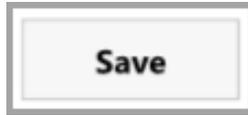


Figure 3-6: Patient Registration Save button

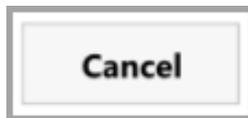
The **Save** button will not be available until all the required fields are completed.

DEMO, DARRELL D 04/19/1951 (69y) MALE	SSN XXX-XX-7777 Show HRN 444444 Last Updated 6/23/2020 (STEELE, KATHY)	Eligibility Status DIRECT ONLY View Active Insurance PCP	RHI NO Sensitive NO Veteran	
Profile Benefits Appointments ADT Record Flags				Warnings 4 Print
Demographics Family Tribal Names & HRN Document Summary Legal Documents Veteran Migrant/Homeless Notes Errors/Warnings SO/GI				
Personal Detail Change Personal Detail Languages				
Ethnicity MEXICAN AMERICAN INDIAN Race AMERICAN INDIAN OR ALASKA NATIVE Primary Language ENGLISH Preferred Language ENGLISH		Employment Religious Preference Place of Birth TAOS, NEW MEXICO Classification/Beneficiary RETIRED MILITARY Marital Status NEVER MARRIED		
Address View History Change Address Internet Access PHR Access				
12345 OAK ST. TAOS, NEW MEXICO, 12345-4444 Rx Patient Residence Present Community TAOS PUEBLO since 6/23/2020 Internet Access NOT ENTERED PHR Access Location of Home		Home Phone 555-555-5555 Work Phone Other Phone E-mail Send Generic Info NO PHR Handout		
Emergency Contact Change Emergency Contact				
Relationship				

Figure 3-7: Saved Patient Record window

3.1.2 Cancel Button

If you do not want to save the information you have entered, click **Cancel** (Figure 3-8) to exit the Register New Patient form.

Figure 3-8: Patient Registration **Cancel** button

3.1.3 Print Face Sheet Report

Standard practice mandates that a face sheet be printed for each patient at the time of registration or edit. The face sheet should then be filed in the patient's chart so that if the clinic staff needs to contact the patient, the most current information and alternate resource information is available. Click **Print**, then select **Face Sheet Report** in the upper-right corner of the patient record (Figure 3-9).



Figure 3-9: **Print Face Sheet Report** option

The **Face Sheet Report** (Figure 3-10) displays in the window.

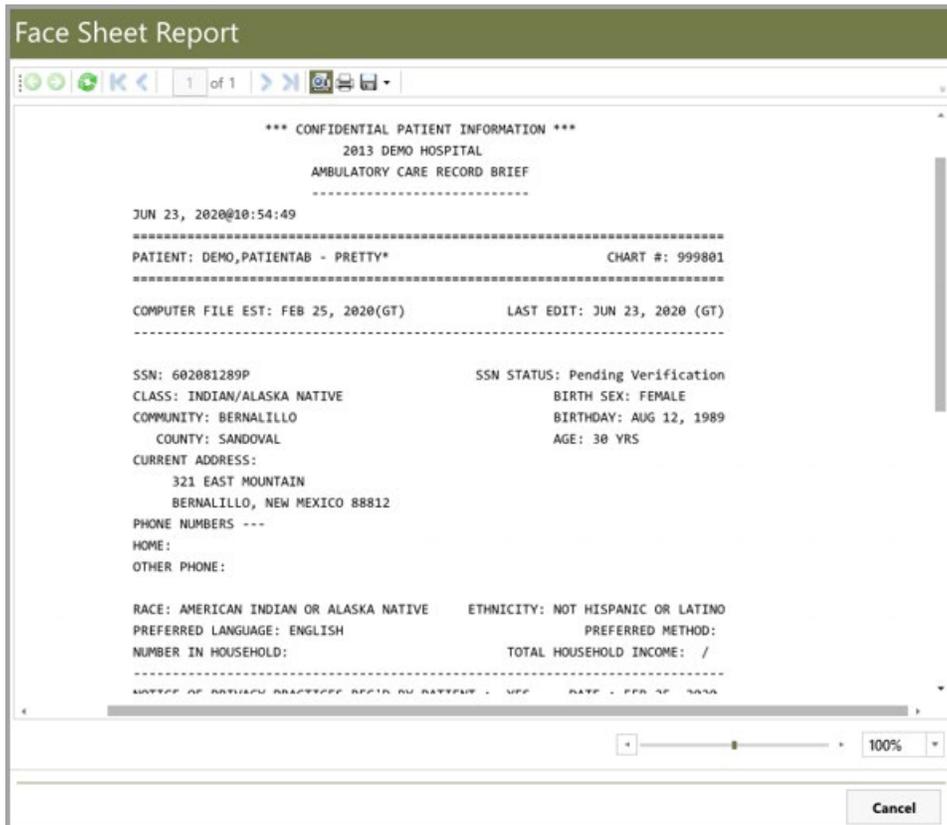


Figure 3-10: **Print Face Sheet Report** window

To print the Face Sheet Report, click the printer icon in the upper left-hand corner.



Figure 3-11: Printer icon

3.2 Patient Header

The Patient Header (Figure 3-12) displays at the top of the patient record, regardless of the other information shown lower on the screen.

DEMO,DARRELL D	SSN XXX-XX-7777 Show	Eligibility Status DIRECT ONLY View	RHI NO	
04/19/1951 (69y) MALE	HRN 444444	Active Insurance	Sensitive NO	
Last Updated 6/23/2020		PCP	Veteran	

Figure 3-12: Patient Header example

The Patient Header provides basic demographic information for the currently selected patient. It includes the following information:

- Patient Name – The patient’s legal name displays in this field.
 - Preferred Name – If a preferred name has been indicated by the patient, it displays next to the patient’s legal name separated with a dash and an asterisk (*) after it (Figure 3-13).

DEMO,ALLY – JACKSON*

05/31/1990 (30y) FEMALE

Figure 3-13: Preferred patient name example

- Patient Record Flag (when present)
- Date of Birth
- Age
- Birth Sex
- SSN
- HRN
- Last Updated timestamp and by whom
- Eligibility Status
- PCP (name of Primary Care Provider)
- Yes/No indicators for these criteria:
 - Active Insurance
 - RHI (Restricted Health Information)
 - Sensitive (Sensitive Patient Tracking)
 - Veteran Status

The **SSN** field displays only the last four digits of the patient's SSN in compliance with the Privacy Act. If you have the appropriate security key access, click **Show/Hide** next to the SSN to display or hide the number.

To view the patient's eligibility reasons from the header, hover your mouse cursor over the **View** option located next to the eligibility status (Figure 3-14).

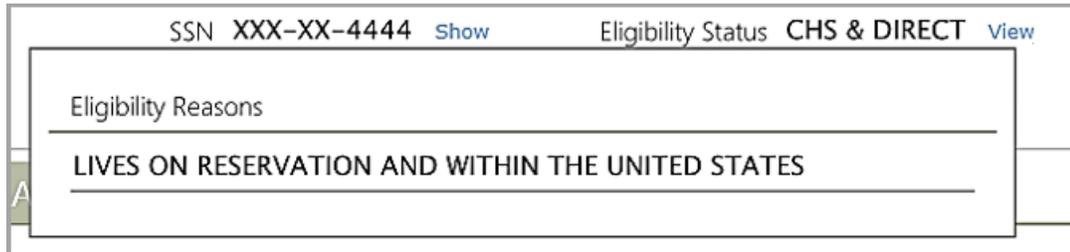


Figure 3-14: Patient Header – View Eligibility Reasons

3.2.1 Patient Record Flag

When present, the patient record flag displays beside the patient's name in the Patient Header. Figure 3-15 shows an example of a patient name with a patient record flag.



Figure 3-15: Patient name with patient record flag

To view an active patient record flag, hover the mouse cursor over the flag icon to display information about the flag. Figure 3-16 shows an example of the information shown for a typical patient record flag.

Flag	Site	Review Date
HIGH RISK OB	DEMO HOSPITAL	12/23/2008
Patient is at high risk for HTN.		

Figure 3-16: Patient Record Flag information example

3.3 Viewing/Editing an Existing Patient Record

You can view and edit a broad range of information within a patient record.

To open an existing patient record, use the search box (Figure 3-17) in the application toolbar.



Figure 3-17: Patient search box

Search for a patient based on the following:

- Name (LAST NAME, FIRST NAME, MIDDLE NAME)
- Last name only
- Last name, Preferred name
- Aliases
- Their exact HRN
- Date of birth (in the form BMMDDYYYY or MM-DD-YYYY)
- Social Security Number (SSN)

Typing one (or a combination) of these search criteria into the search box displays a list of search results. Select a patient from the list to open that patient's record in the Patient workspace.

Note: If the patient's HRN is displayed in the search results, the patient is registered at the selected facility. If no HRN displays, this indicates the patient is not registered at the selected facility. See Section 3.4 for information about moving a patient to a new facility or division.

The Patient Record is comprised of several key components. These include the Patient Header, the **Profile**, **Benefits**, and **Appointment** tabs, the **Patient Record** pane, and the Workspace. The **Profile** and **Benefits** tabs also contain additional pages of information, which provide access to additional information within the patient record. These additional pages are accessible via secondary tabs at the top of the Workspace. All these additional components are described in detail later in this manual.

When a patient record is opened, a list of warnings displays if applicable. Examples of possible warnings are Restricted Health record or if the patient is deceased.

3.4 Moving a Patient to a New Facility or Division

Regardless of the facility or division where a patient was initially registered, that patient's information (such as demographics, benefits, and appointments) can be viewed from other facilities or divisions. However, this information can only be edited when you are viewing the patient record from a facility or division where the patient is registered.

BPRM simplifies the task of moving a patient from one facility to another. Follow these steps to move the patient:

1. Click the **Division Selection** list button on the right side of the Application Toolbar to select the medical facility to where the patient is to be moved.
2. Open the patient's record as described in Section 3.3. The patient's record will display, but the information shown cannot yet be edited.
3. Select the **Names & HRN** page of the **Profile** tab and click the **Health Record Number** button on the right side of the page.
4. In the page display, use the **Health Record Number** field to enter the HRN assigned to the patient for the new facility or division.
 - Optionally, use the Record Disposition list box to choose a reason for the change:
 - **Reactivated**
 - **No Active Chart**
 - **Sent to Archives**
 - **Inactive Record (on file here)**
 - **Registered in Error**
 - **New Chart**

Note: Except for the **Reactivated** and **New Chart** options, using any of these options will set the patient's record to Inactivated. An inactive patient record is not erased from the database. To reactivate a patient file, select the **Reactivated** option from the list.

5. Click **Save** when done to update the patient's record and assign it to the selected facility or division.

4.0 Profile Tab

The **Profile** tab (Figure 4-1) and the separate tabs within it contain a wide range of information about the patient. It is also the default display when you open a new or existing patient record.



Figure 4-1: **Profile** Tab

The **Profile** tab includes these sections, all of which are accessible via tabs at the top of the Workspace:

- **Demographics** tab
- **Family** tab
- **Tribal** tab
- **Names & HRN** tab
- **Document Summary** tab
- **Legal Documents** tab
- **Veteran** tab
- **Migrant/Homeless** tab
- **Notes** tab
- **Errors/Warnings** tab
- **SO/GI** tab

These tabs and the information on them are described in detail in the remainder of this section.

4.1 Demographics Tab

The **Demographics** tab (Figure 4-2) within the **Profile** tab is separated into sections containing personal details, address information, and emergency contact information about the current patient. Any of the information in these sections can be edited by clicking the associated buttons on the right side of each section.

DEMO,PATIENTAB – PRETTY*		SSN 602081289P Show	Eligibility Status CHS & DIRECT View	RHI NO
08/12/1989 (30y) FEMALE	HRN 999801	Active Insurance YES	Sensitive NO	
Last Updated 6/23/2020 (TOWNSEI)		PCP	Veteran NO	

Profile | Benefits | Appointments | ADT | Record Flags | Warnings 5 | Print ▾

Demographics | Family | Tribal | Names & HRN | Document Summary | Legal Documents | Veteran | Migrant/Homeless | Notes | Errors/Warnings | SO/GI

Personal Detail Change [Personal Detail](#) [Languages](#)

Ethnicity NOT HISPANIC OR LATINO	Employment
Race AMERICAN INDIAN OR ALASKA NATIVE	Religious Preference
Primary Language ENGLISH	Place of Birth SANTA FE, NEW MEXICO
Preferred Language ENGLISH	Classification/Beneficiary INDIAN/ALASKA NATIVE
English Proficiency WELL	Marital Status SINGLE

Address [View History](#) Change [Address](#) [Internet Access](#) [PHR Access](#)

321 EAST MOUNTAIN BERNALILLO, NEW MEXICO, 88812	Home Phone
	Work Phone
	Other Phone
Rx Patient Residence	E-mail
Present Community BERNALILLO since 8/12/1989	Send Generic Info NO
Internet Access NOT ENTERED	PHR Handout
PHR Access	
Location of Home	

Emergency Contact Change [Emergency Contact](#)

Relationship
Phone Number

Figure 4-2: **Demographics** tab example

4.1.1 Personal Detail

The **Personal Detail** section of the **Demographics** tab displays this information:

- Ethnicity
- Race
- Primary Language
- Preferred Language (if applicable)
- English Proficiency
- Employment (employer name and status if available)
- Religious Preference
- Place of Birth
- Classification/Beneficiary
- Marital Status

4.1.1.1 Personal Detail Form

Click **Personal Detail** on the right of the **Demographics** tab to change or view the following details. The required fields are labeled and will be highlighted with a red outline if incomplete.

- **Social Security Number.** This field displays the last four-digits of the patient's SSN. If you have the appropriate security access key, the full SSN displays when the field is selected. If this field is empty, the **Reason for No SSN** field must be populated.
- **Reason for No SSN.** Use this field when the **Social Security Number** field is empty. Click within the field then choose one of the options shown on the list to populate this field.
- **SSN Verification Status.** This view-only field shows whether the SSN has been verified, and if so, the agency that verified it.
- **Date of Birth.** This is the patient's date of birth (DOB). Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Birth Sex.** Use this field to specify the patient's gender at birth. Click within the field then select either **Male**, **Female**, or **Unknown**.
- **Marital Status.** Use this field to specify the patient's marital status. Click within the field then choose one of the options shown.
- **Place of Birth (City).** Use this field to specify the city where the patient was born. This field allows alphanumeric characters.
- **Place of Birth (State).** Use this field to specify the state where the patient was born. Click within the field then choose from the options displayed on the list. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the U.S. As a shortcut, you can type the first few letters of the state name, then select the state from the list.
- **Employment Status.** Use this field to specify the patient's employment status. Click within the field then choose one of the options shown on the list.
- **Employer.** Use this field to specify the patient's employer. To search, click within the field and type one or more of the letters contained in the employer's name to display a list of search results. Click on a name to populate the field. If the employer's name is not found, it can be added via the Settings module. See Section 9.4 for more information about adding an employer.
- **Religious Preference.** Use this field to specify the patient's religious preference. Click within the field then choose one of the options shown on the list.
- **Classification/Beneficiary.** Use this field to specify the patient's classification or beneficiary. Click within the field, then choose one of the options shown on the list.

- **Ethnicity** – Use this field to select the patient’s ethnicity (Figure 4-3. Click the field to view the extensive list (use the scroll bar to see the full list).

Ethnicity [required]	Collection Method [required]		
PERUVIAN	SELF IDENTIFICATION	Remove	
ASTURIAN	PROXY	Remove	
CENTRAL AMERICAN	OBSERVER	Remove	Add Ethnicity

Figure 4-3: Ethnicity Selection fields

- **Collection Method** – Use this field to select the method used for determining the ethnicity selection. The default is **Self Identification**. The choices are:
 - **OBSERVER**
 - **PROXY**
 - **SELF IDENTIFICATION**
 - **UNKNOWN**
- **Add Ethnicity** – Multiple ethnicities can be added to a patient record. Click Add Ethnicity to open a new **Ethnicity** field. Select another ethnicity from the list.
- **Remove** – Click **Remove** to remove any of the existing ethnicities.
- **Unknown by Patient** – The patient does not know their ethnicity.
- **Declined to Answer** – The patient has declined to provide ethnicity information.

Note: If **Unknown by Patient** or **Declined to Answer** is selected in the **Ethnicity** field when attempting to add another ethnicity and the user clicks **Add Ethnicity**, the system displays the following message in red and the new ethnicity is not added: *“If ethnicity is unknown or declined to answer, no other ethnicity can be selected.”*

- **Race** – Use this field to select the patient’s race. Click within the field to view the list (use the scroll bar to see the full list). Select one of the options.
 - Add Race – Multiple races can be added to a patient record. Click Add Race to open a new Race field. Select another race from the list.
 - Collection Method – Use this field to select the method used for determining the race selection. The default is **Self Identification**. The choices are:
 - **OBSERVER**
 - **PROXY**

- **SELF IDENTIFICATION**
- **UNKNOWN**

- **Remove** – Click Remove to remove any of the existing ethnicities.
- **Unknown by Patient** – The patient does not know their race.
- **Declined to Answer** – The patient has declined to provide race information.

Note: If **Unknown** or **Declined to Answer** is selected in the **Collection Method** field when attempting to add another race, the system displays the following message in red and the new race is not added: *“If race is unknown or declined to answer, no other race can be selected.”*

- **Eligibility Status.** Use this field to specify the patient’s eligibility status. Click within the field, then choose one of the options shown on the list. This status indicates the eligibility for care at an IHS facility.
- **Eligibility Reasons.** Use this list to specify the reasons for the patient’s eligibility. The list of available reasons will depend on the patient’s eligibility status. Select one or more reasons from the list shown. Use the scroll bar next to the list to view all the options. See Section 9.2 for more information about adding Eligibility Modifiers.

4.1.1.2 Languages Form

Click **Languages** on the right of the **Demographics** tab to change or view the following details. The required fields are labeled and will be highlighted with a red outline if incomplete:

- **Primary Language.** Use this field to specify the patient’s primary language. To search for a language, click within the field and type one or more of the letters contained in the language name to display a list of search results. Click the language name to add it to the field.
- **English Proficiency.** Click within the field then choose from the options on the list to describe the English proficiency of the patient. If the patient’s primary language is not English, this field is required.
- **Preferred Language.** Use this field to specify the patient’s preferred language. As with the primary language field, click within the field and type one or more of the letters contained in the language name to display a list of search results. Click the language name to add it to the field.
- **Interpreter Required.** Click within the field then choose from the options shown on the list to indicate whether the patient needs an interpreter. If the patient’s primary language is not English, this field is required.

- **Other Languages Spoken Section.** The Other Languages Spoken section contains a list of other languages the patient speaks or uses. To search for a language, click within the field and type one or more of the letters contained in the language name to display a list of search results. Select the name to add it to the field and click **Add**. Languages can be removed from the list by clicking **Remove** beside the name.

Be aware that if English is not the Primary Language or Preferred Language, the **Other Languages Spoken** field must contain one of the languages noted in those fields.

4.1.2 Address

The **Address** section of the **Demographics** tab shows this information:

- Street Address, including city, state, and ZIP code
- Rx Patient Residence
- Present Community
- Internet Access
- PHR Access
- Location of Home
- Home, Work, and Other phone numbers
- E-mail Address
- Send Generic Info and Preferred Method of Communication
- PHR Handout

Click **View History** at the top of the **Address** section to see a listing of any previous addresses and communities as well as previous entries for PHR access that have been entered for the selected patient.

Click **Address** on the right of the **Demographics** tab to change or view these details:

- **Street Address** (Line 1, Line 2, Line 3). Use these fields to specify the patient's street address. These three free-text fields allow alphanumeric characters.
- **City**. Use this field to specify the city where the patient's street address is located. This free-text field allows alphanumeric characters.
- **State**. Use this field to specify the state or province where the patient's street address is located. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list shown.

- **Zip Code.** When applicable, use this field to specify the zip code where the patient's street address is located. This field accepts the five-digit zip code plus four-digit extension.
- **Location of Home.** Use this free-text field to add a narrative describing how to get to the patient's home.
- **Rx Patient Residence.** This field is used to enter a valid pharmacy patient residence type, to comply with CMS 2014 requirements for coding patient residence on pharmacy claim transactions. Options are provided for this field. If an Rx Patient Residence is not specified, the field will default to **1-Home**.
- **Present Residence Community.** This field displays the community where the patient currently resides. To search for a community, click within the field and type one or more of the letters contained in the community name to display a list of search results. Click a community name to add it to the field.
- **Since.** This field displays the date the patient moved to the current location. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Phone (Home, Work, and Other).** Use these three fields to enter the patient's home, work, and other phone numbers. Each is a free-text field that accepts alphanumeric characters. Be sure to include the area code.

Click **Internet Access** on the right of the **Demographics** tab to change or view these details:

- **Has Internet Access.** Select **Yes** within this list box to indicate that the patient has Internet access. Select **No** if the patient does not have Internet access.
- **E-mail Address.** Use this free-text field to enter the patient's e-mail address.
- **Internet Access Locations.** Select any combination of these check boxes to indicate the locations where the patient has access to the Internet.
- **Send Generic Health Information.** Select this option to indicate whether the patient would like to receive generic information sent to their email address.
- **Preferred Method of Communication.** This field indicates how the patient would like to be contacted to receive reminders. Click within the field then choose from the options shown on the list to indicate the patient's preferred method for receiving reminders.

Click **PHR Access** on the right of the **Demographics** tab to change or view these details:

- **PHR Access.** Select **Yes** within this list box to indicate that the patient has access to their Personal Health Record (PHR). Select **No** if the patient does not have PHR access.

- **PHR Access Date.** Use this field to show the date(s) when a patient was given PHR access. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **PHR Handout.** Use this field to show the date(s) when a patient received a PHR handout. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.

4.1.3 Emergency Contact

The **Emergency Contact** section of the **Demographics** tab contains contact information to be used in case of a patient emergency. It shows this information:

- **Name and Address** (of contact person)
- **Relationship**
- **Home Phone**
- **Work Phone**

Click **Emergency Contact** on the right of the **Demographics** tab to change or view these details:

- **Name.** Use this field to enter the name of the emergency contact person, using the LAST,FIRST name format. Most often, this is the patient's spouse, parent, or grown child.
- **Relationship.** Click within the field then choose from the options on the list displayed to indicate the emergency contact person's relationship to the patient. If no relationship is found from the list, select **Other**.
- **Street Address.** Use this field to specify the emergency contact's street address. This free-text field allows alphanumeric characters.
- **City.** Use this field to specify the city where the emergency contact resides. This free-text field allows alphanumeric characters.
- **State.** Use this field to specify the state where the emergency contact resides. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list shown.
- **Zip Code.** When applicable, use this field to specify the zip code where the emergency contact person's street address is located. If used, this field must contain five digits.
- **Phone Number.** Use this field to enter the emergency contact person's home phone number. This is a free-text field that accepts numeric digits. Be sure to include the area code. The number entered into this field should be verified as correct.

- **Work Phone.** Use this field to enter the emergency contact person’s work phone number. This is a free-text field that accepts numeric digits. Be sure to include the area code. The number entered into this field should be verified as correct.

To copy the patient’s Street Address, City, State, Zip code and Phone fields to the **Emergency Contact** information form, click **Patient’s Address** on the right side of the page.

Note: If the Patient’s Address includes the zip code plus four digits, only the zip code portion (five digits) will be copied.

Similarly, to copy the Next of Kin’s information to the **Emergency Contact** information form, click **Next of Kin** in the upper right corner of the page. The Next of Kin information on the **Family** tab of the **Profile** tab must be entered before this will have any effect. See Section 4.2.2 for more information about the Next of Kin section of the **Family** tab within the **Profile** tab.

4.2 Family Tab

The **Family** tab (Figure 4-4) within the **Profile** tab is separated into two sections containing detailed information about the patient’s family and next of kin. Any of the information in these two sections can be edited by clicking the associated buttons on the right side of the page.

Figure 4-4: **Family** tab example

4.2.1 Family Information Section

The **Family Information** section of the **Family** tab shows this information:

- **Father’s Name**
- **Father’s Birthplace**
- **Father’s Phone**

- **Father's Other Phone**
- **Father's E-mail**
- **Father's Employer Name**
- **Spouse's Employer Name**
- **Number in Household**
- **Mother's Maiden Name**
- **Mother's Birthplace**
- **Mother's Phone**
- **Mother's Other Phone**
- **Mother's E-mail**
- **Mother's Employer Name**
- **Total Household Income**

Click **Family Information** on the right of the **Family** tab to change or view these details:

- **Father's Name.** Use this field to specify the name of the patient's father.
- **Father's Birth City.** Use this field to specify the city where the patient's father was born.
- **Father's Birth State.** Use this field to specify the state where the patient's father was born. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list shown.
- **Father's Employer.** Use this field to specify the where the patient's father is employed. To search, click within the field and type one or more of the letters contained in the employer's name to display a list of search results. Click on a name to populate the field. If the employer's name is not found, it can be added via the Settings module as described in Section 9.4.1.
- **Father's Phone and Other Phone.** Use these two fields to enter primary and other phone numbers associated with the patient's father. Each is a free-text field that accepts numeric digits. Be sure to include the area code.
- **Father's E-mail.** Use this field to specify the e-mail address of the patient's father. This is a free-text field.
- **Mother's Maiden Name.** Use this field to specify the maiden name of the patient's mother.

- **Mother's Birth City.** Use this field to specify the city where the patient's mother was born.
- **Mother's Birth State.** Use this field to specify the state where the patient's mother was born. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list.
- **Mother's Employer.** Use this field to specify the where the patient's mother is employed. To search, click within the field and type one or more of the letters contained in the employer's name to display a list of search results. Click on a name to populate the field. If the employer's name is not found, it can be added via the Settings module as described in Section 9.4.1.
- **Mother's Phone and Other Phone.** Use these two fields to enter primary and other phone numbers associated with the patient's mother. Each is a free-text field that accepts numeric digits. Be sure to include the area code.
- **Mother's E-mail.** Use this field to specify the e-mail address of the patient's mother. This is a free-text field.
- **Spouse's Employer.** Use this field to specify the where the patient's spouse is employed. To search, click within the field and type one or more of the letters contained in the employer's name to display a list of search results. Click on a name to populate the field. If the employer's name is not found, it can be added via the Settings module as described in Section 9.4.1.
- **Number in Household.** Use this field to specify the number of people residing in the patient's household.
- **Total Household Income.** Use this field to specify the patient's total household income on a weekly, bi-weekly, monthly, or yearly basis.
- **Household Income Period.** Use this field to specify the basis used in the Total Household Income field.

4.2.2 Next of Kin Section

The **Next of Kin** section of the **Family** tab shows this information:

- **Name and address of Next of Kin**
- **Relationship**
- **Home Phone**
- **Work Phone**

Click **Next of Kin** on the right of the **Family** tab to change or view these details:

- **Name.** Use this field to enter the name of the patient's next of kin, using the LAST, FIRST name format. Most often, this is the patient's spouse, parent, or grown child.
- **Relationship.** Click within the field then choose from the options on the list displayed to indicate the next of kin's relationship to the patient. If no relationship is found from the list, select **Other**.
- **Street Address.** Use this field to specify the street address for the patient's next of kin. This free-text field allows alphanumeric characters.
- **City.** Use this field to specify the city where the patient's next of kin resides. This free-text field allows alphanumeric characters.
- **State.** Use this field to specify the state where the patient's next of kin resides. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list shown.
- **Zip Code.** When applicable, use this field to specify the Zip code where the next of kin's street address is located. If used, this field must contain five digits.
- **Phone Number.** Use this field to enter the next of kin's home phone number. This is a free-text field that accepts numeric digits. Be sure to include the area code. The number entered in this field should be verified as correct.
- **Work Phone.** Use this field to enter the next of kin's work phone number. This is a free-text field that accepts numeric digits. Be sure to include the area code. The number entered in this field should be verified as correct.

To copy the patient's Street Address, City, State, Zip code and Phone fields to the Next of Kin information form, click **Patient's Address** on the right side of the page.

Note: If the patient's address includes the zip code plus four digits, only the zip-code portion (five digits) will be copied.

To copy the Emergency Contact's information to the Next of Kin information form, click **Emergency Contact** on the right side of the page. The Emergency Contact information on the **Demographics** tab must be entered before this will have any effect. See Section 4.1.3 for more information about the Emergency Contact section **Demographics** tab.

4.3 Tribal Tab

The **Tribal** tab (Figure 4-5) within the **Profile** tab is separated into two sections containing detailed information about the patient's primary tribal membership and any other tribes to which they belong. Any of the information in these two sections can be edited by clicking the associated buttons on the right side of the page.

The screenshot displays the 'Tribal' tab within a patient's profile. At the top, patient information includes: DEMO,NEWPERSONA - SUNNY*, SSN 502092780P, HRN 999845, Last Updated 6/23/2020 (REGISTRATION,U), Eligibility Status CHS & DIRECT, Active Insurance FCP, RHI NO, Sensitive NO, and Veteran. Below this, navigation tabs include Profile, Benefits, Appointments, ADT, Record Flags, Warnings (4), and Print. The 'Tribal' tab is selected, showing sub-tabs: Demographics, Family, Tribal, Names & HRN, Document Summary, Legal Documents, Veteran, Migrant/Homeless, Notes, Errors/Warnings, and SO/GI. The 'Tribe of Membership' section contains: Indian Blood Quantum: FULL, Tribe of Membership: PUEBLO OF SANTA ANA, NM, and Quantum: FULL. A 'Change Tribe of Membership' button is visible. The 'Other Tribes' section has an 'Add Other Tribe' button and a table with columns for Tribe and Quantum.

Figure 4-5: **Tribal** tab example

4.3.1 Tribal Membership Section

The **Tribal Membership** section of the **Tribal** tab provides information about the patient's primary tribe. It shows this information:

- **Indian Blood Quantum**
- **Tribe of Membership**
- **Quantum**
- **Enrollment Number**

Click **Tribe of Membership** on the right of the **Tribal** tab to change or view these details:

- **Indian Blood Quantum.** Use this field to indicate the patient's overall Indian blood quantum, expressed as a fraction in a numerator/denominator format, such as 1/2 or 1/4. Alternatively, enter one of these text choices:
 - F or Full
 - UNK or Unknown
 - UNS or Unspecified

If this figure is entered as a fraction, note that it must not be less than the Tribe quantum, which is specific to a single tribe.

- **Tribe of Membership.** Use this field to specify the patient's primary tribal membership. To search, click within the field and type one or more of the letters contained in the tribe name to display a list of search results. Click on a name to populate the field.
- **Quantum.** Use this field to indicate the patient's tribal blood quantum expressed as a fraction in a numerator/denominator format, such as 1/2 or 1/4. Alternatively, enter one of these text choices:
 - F or Full
 - UNK or Unknown
 - UNS or UnspecifiedSince this quantum is for the primary tribe only, this fraction must not be more than the overall Indian blood quantum.
- **Enrollment Number.** Use this field to enter the patient's tribal enrollment number. This is a free-text field that accepts alphanumeric characters for the enrollment number.

4.3.2 Other Tribes Section

The **Other Tribes** section of the **Tribal** tab provides information about other tribes the patient is a member of. When used, it shows the name of the other tribe (or tribes) and the patient's Indian blood quantum for each tribe.

Click **Other Tribe** on the right side of the **Tribal** tab to change or view these details:

- **Other Tribe.** Use this field to specify the patient's other tribal membership. To search, click within the field and type one or more of the letters contained in the tribe name to display a list of search results. Select a name to populate the field.
- **Quantum.** Use this field to indicate the patient's tribal blood quantum expressed as a fraction in a numerator/denominator format, such as 1/2 or 1/4. Alternatively, enter one of these text choices:
 - F or Full
 - UNK or Unknown
 - UNS or UnspecifiedSince this quantum is for the other tribes only, this fraction must not be more than the overall Indian blood quantum.

4.4 Names & HRN Tab

The **Names & HRN** tab (Figure 4-6) within the **Profile** tab is separated into sections containing Preferred Name, Aliases, Legal Names, and Health Record Number used by the patient, as well as the HRN assigned to the patient. Any of the information in these four sections can be edited by clicking the associated buttons on the right side of the page.

The screenshot displays the 'Names & HRN' tab within a patient profile. At the top, patient details include: DEMO,NEWPERSONA - SUNNY*, SSN 502092780P, HRN 999845, Eligibility Status CHS & DIRECT, Active Insurance PCP, RHI NO, Sensitive NO, and Veteran. The 'Names & HRN' tab is selected, showing sections for Preferred Name (SUNNY), Aliases (DEMO,ALIASNAME, DEMO,OTHERNAME), Legal Names, and Health Record Number. A table at the bottom lists Record Number, Facility, Status, Record Disposition, and Inactivated on.

Figure 4-6: **Names & HRN** tab example

4.4.1 Preferred Name

Patients may specify a preferred name that differs from their legal name. If a preferred name is provided, it displays in the Name field next to the legal name, separated by a dash and identified with an asterisk (for example, DEMO,MARGARET - MAGGIE*).

Click **Edit** to enter, modify, or remove the preferred name, then click **Save**. Click **Cancel** to close the window without saving.

4.4.2 Aliases Section

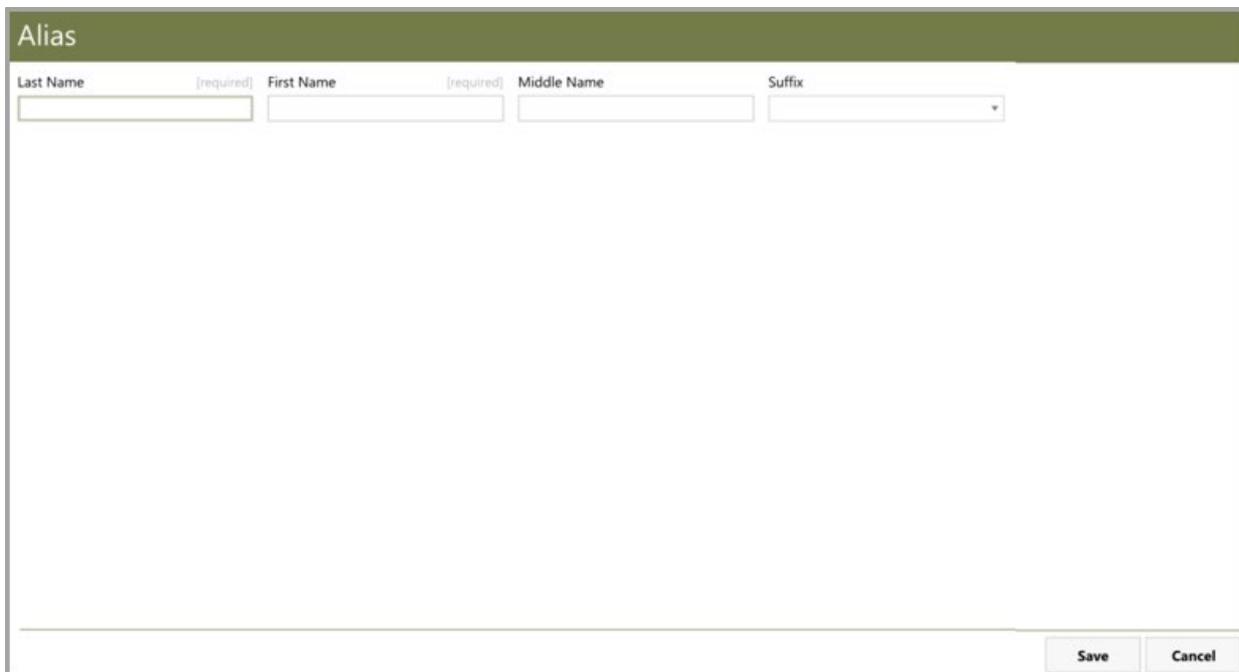
The **Aliases** section of the **Names & HRN** tab lists any alias names associated with the patient (Figure 4-7). Alias names can also be used when conducting a search for a patient.



Aliases	Add	Edit	Delete
DEMO,JACKIE J			

Figure 4-7: Alias section of Patient Profile

- To add a new alias, click **Add** on the right side of the page. The Alias window displays. See Figure 4-8 below.
- To edit an existing alias, select the name from the list and click **Edit** on the right side of the page. Once you have completed your changes, click **Save**.
- To delete an existing alias, select the name from the list and click **Delete** on the right side of the page. To confirm the deletion, click **OK** or you can click **Cancel** to return to the previous screen.



Alias

Last Name [required] First Name [required] Middle Name Suffix

Save Cancel

Figure 4-8: Add **Alias** window

- Complete the fields provided for **Last Name**, **First Name**, **Middle Name**, and **Suffix** (if applicable). When finished adding the new alias, click **Save**. Click **Cancel** to return to the previous screen without saving the information.

4.4.3 Legal Names Section

The **Legal Names** section of the **Names & HRN** tab lists any legally changed names associated with the patient. This section shows this information for each name listed:

- **Document Number**
- **Name Changed To**
- **Date Changed**
- **Proof Provided**

Click **Add Legal Name** on the right side of the page to add a new legal name to the patient's record. New legal names will automatically be added as a new Alias name. Future searches for the patient will return the most current legal name of the patient. These self-explanatory fields are used in entering a new alias name:

- **Last Name**
- **First Name**
- **Middle Name**
- **Suffix**
- **Document Number.** Use this field to enter a document number (if provided). This is a free-text field that accepts alphanumeric characters.
- **Date Changed.** Use this field to enter the date that the legal name was changed. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Proof Provided.** Use this field to specify the type of documentation provided by the patient as proof of the legal name change. Click within the field then choose from the options on the list displayed to indicate how the legal name change was proven.

To edit an existing legal name, select the name from the list and click **Edit** on the right side of the page. Once you have completed your changes, click **Save**.

To delete an existing legal name, select the name from the list and click **Delete** on the right side of the page. To confirm the deletion, click **OK** or you can click **Cancel** to return to the previous screen.

4.4.4 HRN Section

The **Health Record Number** section of the **Names & HRN** tab lists any Health Record Numbers assigned to the patient. This section shows this information for each record listed:

- **Record Number**
- **Facility**

- **Status**
- **Record Disposition**
- **Inactivated On**

Click **Health Record Number** on the right of the page to edit or inactivate an assigned health record number. These fields display:

- **Health Record Number.** Use this field to change the Health Record Number for the selected patient. The current HRN displays in this field. To change the patient's HRN, type a new number and click **Save**. If the HRN you enter is already in use, a warning message displays, and you will not be able to save the patient record.
- **Record Disposition.** Use this field to indicate the disposition of the patient's record. Click within the field then choose from the options displayed to indicate the reason for the patient's record update:
 - **Reactivated**
 - **No Active Chart**
 - **Sent to Archives**
 - **Inactive Record**
 - **Registered in Error**
 - **New Chart**

Note: Except for the **Reactivated** and **New Chart** options, using any of these options will set the patient's record to Inactivated. An inactive patient record is not erased from the database. To reactivate a patient file, select the **Reactivated** option from the list.

After making the desired changes, click **Save** to save the updated patient record.

4.5 Document Summary Tab

The **Document Summary** tab (Figure 4-9) within the **Profile** tab is separated into sections showing information about the **Restricted Health Information**, **Notice of Privacy Practices**, **Death Information**, and **Advance Directives**.

DEMO, NEWPERSONA - SUNNY* SSN 502092780P Show Eligibility Status CHS & DIRECT View RHI NO
 09/27/1980 (39y) MALE HRN 999845 Active Insurance Sensitive NO
 Last Updated 6/23/2020 (REGISTRATION,U) PCP Veteran

Profile Benefits Appointments ADT Record Flags Warnings 4 Print

Demographics Family Tribal Names & HRN **Document Summary** Legal Documents Veteran Migrant/Homeless Notes Errors/Warnings SO/GI

Restricted Health Info Change Restricted Health Info

Reason

Notice of Privacy Practices Change Notice of Privacy Practices

Received by Patient Acknowledgement Signed Reason

Death Information Change Death Information

Advance Directives Add Edit Delete

Directive	Date of Entry	Type	Reason

Figure 4-9: Document Summary tab example

4.5.1 Restricted Health Info Section

When used, the **Restricted Health Info** section of the **Document Summary** tab displays any restricted health information related to the selected patient. This section shows the status, date, and approving official, if available. Click **Restricted Health Info** on the right of the page to edit this information:

- **Reason.** Use this field to indicate the reason for the patient's restricted health information designation. This is a free-text field that accepts alphanumeric characters.
- **Status.** Use this field to show the status of the patient's restricted health information designation. Click within the field then choose from the options on the list displayed to show the restricted health status.
- **Date.** Use this field to enter the date that the Restricted Health Info was entered or changed. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Entered By.** (For Pending or Entered in Error status only) Use this field to enter the name of the person documenting the request.
- **Name of Official.** (For Approved, Not Approved or Revoked status only) Use this field to enter the name of the official who approved, denied, or revoked the restricted health information designation.

When the **Status** field is set to Approved, this will mark the patient's record as restricted. The patient header information will indicate this status next to the **RHI** label and a warning will display before the patient's record can be opened or accessed.

4.5.2 Notice of Privacy Practices Section

The **Notices of Privacy Practices** section of the **Document Summary** tab shows if the selected patient received a Notice of Privacy Practices, and when it was received, as per the Health Insurance Portability and Accountability Act (HIPAA). Click **Notice of Privacy Practices** on the right of the page to edit this information:

- **Received by Patient.** Select this check box if the patient has received the NPP (Notice of Privacy Practices).
- **Received Date.** Use this field to indicate the date the patient received the Acknowledgement of Receipt of the Notice of Privacy Practices. This is a HIPAA requirement. It is a required field if the **Received by Patient** check box is selected. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Acknowledgement Signed.** If the acknowledge was signed, select the check box indicating that the signature was obtained.
- **Privacy Act Date.** Use this field to show the date that the patient signed the Acknowledgement of Receipt of the Notice of Privacy Practices. This is a HIPAA requirement. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Reason.** If the acknowledgement has not been signed, use this free-text field to explain why it was not signed.

4.5.3 Death Information Section

When used, the **Death Information** section of the **Document Summary** tab displays the date and location of the patient's death, as well as the Death Certificate number. Click **Death Information** on the right of the page to edit this information:

- **Preliminary Date of Death.** Use this field to indicate the preliminary date of the patient's death. This field only displays when a patient has been discharged from the ADT module due to death.
- **Preliminary Cause of Death.** Use this field to enter the preliminary cause of the patient's death. This field is free-text and only displays when a patient has been discharged from the ADT module due to death.
- **Date of Death.** Use this field to indicate the date when the patient's death occurred. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Time of Death.** Use this field to indicate the time when the patient's death occurred. Manually enter the time using any of the accepted time formats or click the clock icon to select from a list of times.
- **Death Certificate Number.** Use this field to enter the death certificate number if available.

- **State of Death.** Use this field to specify the state in which the patient's death took place. Click within the field then choose from the options on the list displayed. The list includes the 50 United States, the U.S. territories, Canadian provinces, and several other countries outside the United States. As a shortcut, you can type the first few letters of the state name then select the state from the list shown.

When a date of death has been entered in a patient's record, the patient's information can no longer be edited except to update the Death Info section. The Patient Header at the top is shaded to indicate that this patient is marked as deceased.

Click **Clear Death Info** in the upper right corner of the page to remove any death info entered. This will delete all death information for the selected patient.

4.5.4 Advance Directives

When used, the **Advance Directives** section of the **Document Summary** tab shows whether an advance directive has been provided regarding the patient's wishes in the event of a life-threatening event. If an advance directive has been provided, this section shows the date the directive was entered, the type of directive, and the reason it was provided.

Click **Add Advance Directive** on the right of the page to enter this information:

- **Directive.** Select this check box if an advance directive has been provided for the patient.

Note: If you select and then clear this check box, the result is a No entry.

- **Date of Entry.** Use this field to show the effective date for the advance directive. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view. This field is required if the **Directive** check box is selected.
- **Type.** Use this field to show the type of advance directive provided. Click within the field, then choose from the options on the list. This field is required if the **Directive** check box is selected.
- **Reason.** Use this free-text field to describe the reason an advance directive was not provided.

To edit an existing advance directive, select the name from the list and click **Edit** on the right side of the page. Once you have completed your changes, click **Save**.

To delete an existing advance directive, select the name from the list and click **Delete** on the right side of the page. To confirm the deletion, click **OK** or you can click **Cancel** to return to the previous screen.

4.6 Legal Documents Tab

The **Legal Documents** tab (Figure 4-10) within the **Profile** tab provides a listing of legal documents that have been added to the patient's records.

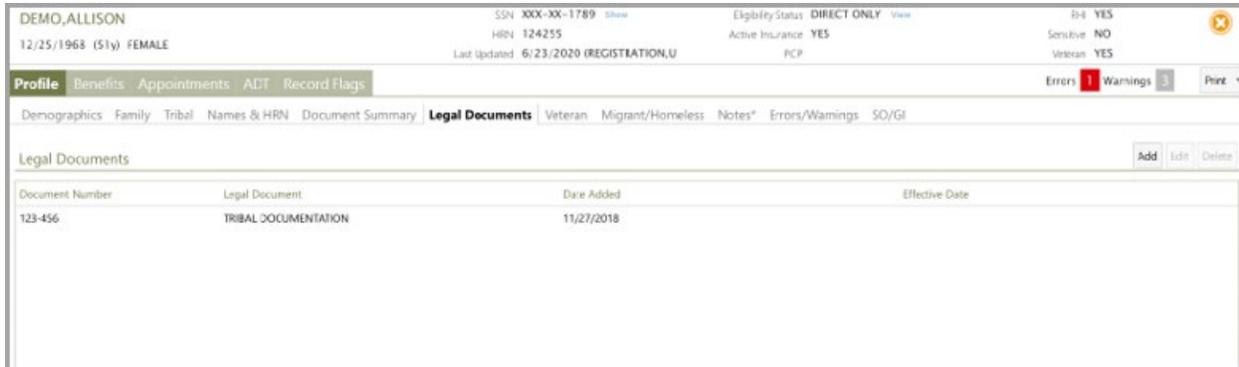


Figure 4-10: **Legal Documents** tab example

Click **Add Legal Document** on the right side of the page to add this information:

- **Document Number.** Use this field to enter a document number (if provided). This is a free-text field that accepts alphanumeric characters.
- **Legal Document.** Use this field to specify the type of legal document you are adding to the patient record. Click within the field then choose from the options on the list displayed. See 9.1 for more information about using the Eligibility Modifiers table to add Legal Document to this list.
- **Date Added to File.** Use this field to show when the legal document was added to the patient file. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Effective Date.** Use this field to show the date the legal document became (or becomes) effective. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **End Date.** Use this field to show the date the legal document is no longer effective. If there is no expiration date on the document, this field can be left blank. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.

To edit an existing legal document, select the name from the list and click **Edit** on the right side of the page. Once you complete your changes, click **Save**.

To delete an existing legal document, select the name from the list and click **Delete** on the right side of the page. To confirm the deletion, click **OK** or you can click **Cancel** to return to the previous screen.

4.7 Veteran Tab

When used, the **Veteran** tab (Figure 4-11) within the **Profile** tab shows information about the patient's military service.

DEMO, NEWPERSONA - SUNNY*
09/27/1980 (39y) MALE

SSN 502092780P Show
HRN 999845
Last Updated: 6/23/2020 (REGISTRATION,U)

Eligibility Status CHS & DIRECT View
Active Insurance PCP

RHI NO
Sensitive NO
Veteran

Profile Benefits Appointments ADT Record Flags

Demographics Family Tribal Names & HRN Document Summary Legal Documents **Veteran** Migrant/Homeless Notes Errors/Warnings SO/GI

Veteran Information Change Veteran Information

Veteran	
Service Branch	Service Entry Date
Claim Number	Service Separation Date
Valid VA Card	Vietnam Service Indicated
Date VA Card Copy Obtained	Is Service Connected
Description of VA Disability	

Figure 4-11: **Veteran** tab example

The **Veteran Information** page shows this information:

- **Veteran**
- **Service Branch**
- **Claim Number**
- **Valid VA Card**
- **Date VA Card Copy Obtained**
- **Description of VA Disability**
- **Service Entry Date**
- **Service Separation Date**
- **Vietnam Service Indicated**
- **Is Service Connected**

Click **Veteran Information** on the right side of the page to enter or change these details:

- **Is Veteran.** Select **Yes** or **No** from this list box to indicate if the patient is a veteran of the U.S. military.
- **Service Branch.** Use this field to indicate the military branch in which the patient entered their last period of military service. Click within the field then choose the appropriate option on the list displayed.
- **Service Entry Date.** Use this field to show the date the patient entered their last period of military service. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.

- **Service Separation Date.** Use this field to show the date the patient ended their last period of military service. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
- **Vietnam Service Indicated.** Use this field to indicate whether the patient's disability is Vietnam Service indicated. Click within the field then choose the appropriate option on the list displayed.
- **Claim Number.** Use this field to enter the patient's claim number, using seven or eight characters.
- **Is Service Connected.** Select this check box to indicate that the disability is service connected.
- **Description of VA Disability.** Use this field to type a description of the service disability, using three to 60 characters. (This field is optional.)
- **Valid VA Card.** Select this check box to indicate that the patient has a valid Veterans Administration (VA) card.
- **Date VA Card Copy Obtained.** Use this field to show the date the copy of the patient's VA card was obtained. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.

4.8 Migrant/Homeless Tab

When used, the **Migrant/Homeless** tab (Figure 4-12) within the **Profile** tab shows information about the patient's migrant or homeless status (if applicable).

The screenshot displays the 'Migrant/Homeless' tab within a patient profile. At the top, patient information for 'DEMO, ALLISON' is shown, including SSN, HRN, and eligibility status. Below this, a navigation bar includes 'Profile', 'Benefits', 'Appointments', 'ADT', and 'Record Flags'. The 'Migrant/Homeless' tab is active, showing two sections: 'Migrant' and 'Homeless'. Each section has a 'Change' button and a 'Type' field. The 'Migrant' section shows 'Migrant Worker: NO' and 'Last Updated: 11/27/2018'. The 'Homeless' section shows 'Homeless: NO' and 'Last Updated: 11/27/2018'. There are also 'Errors' and 'Warnings' indicators in the top right corner.

Figure 4-12: **Migrant/Homeless** tab example

Note: The **Migrant/Homeless** tab is only visible when it has been specifically enabled by the Site Administrator through the Patient Registration site parameters. Additionally, some sites may only have access to the Migrant or the Homeless sections; other sites may have access to both.

4.8.1 Migrant Section

The Migrant section shows this information:

- **Migrant status**
- **Last updated**
- **Migrant Worker Type**

4.8.2 Homeless Section

The Homeless section shows this information:

- **Homeless status**
- **Last updated**
- **Homeless Type**

Click either **Migrant** or **Homeless** (depending on what is displayed at your site) to change this information in a patient's record.

4.9 Notes Tab

The **Notes** tab (Figure 4-13) within the **Profile** tab shows available notes about the current patient's record. This is a free-text field where you can add or remove notes as needed. If notes have been entered on this page, an asterisk is displayed next to the **Notes** tab label at the top of the **Profile** tab page.



Figure 4-13: **Notes** tab example

Click **Edit Notes** to add and edit text for the current patient.

4.10 Errors/Warnings Tab

The **Errors/Warnings** tab (Figure 4-14) within the **Profile** tab shows information about errors or warnings that have been found within the patient data.

Note: Icons are displayed in the upper-right corner of the Workspace below the Patient Header if any errors or warnings exist.

Each error and warning displays in a list format. If displayed, click **Fix it** on the right of the page to navigate directly to the tab or form requiring correction.



Figure 4-14: **Errors/Warnings** tab example

Note: Errors and warnings displayed are dependent on patient-registration site parameters established within RPMS.

4.11 SO/GI Tab

The **Sexual Orientation/Gender Identity – SO/GI** tab (Figure 4-15), within the **Profile** tab, enables the user to add, edit, and remove an existing patient’s information with their sexual orientation and gender identity preferences.

Select the **SO/GI** tab.

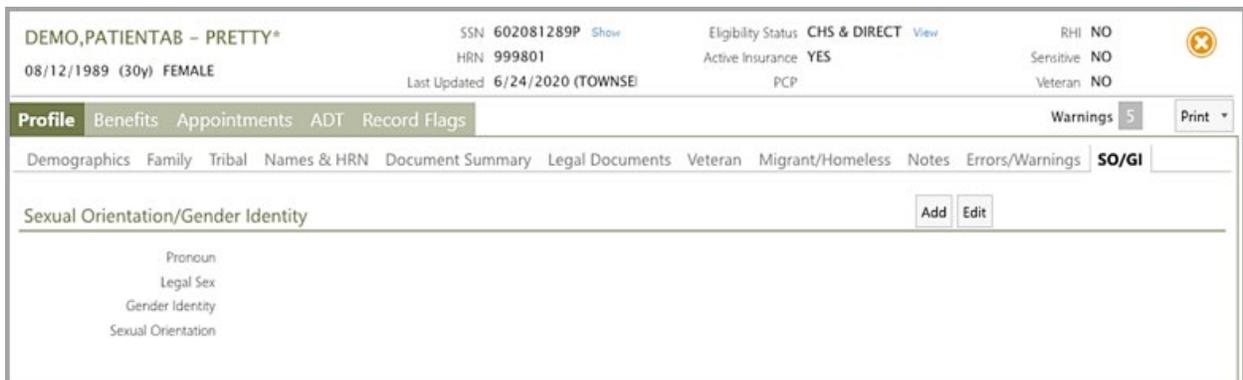


Figure 4-15: **SO/GI** tab example

4.11.1 Adding SO/GI Information

To add new SO/GI information to an existing patient, click **Add** to open the SO/GI Add Information window (Figure 4-16).

Figure 4-16: **Sexual Orientation/Gender Identity** add information window

- **Pronoun**

This field allows the user to add a preferred pronoun, as indicated by the patient, to the patient's name. Click in the **Pronoun** field and a list of pronouns displays. Scroll through the list and select one of the entries:

- 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
- SPIVAK – EY,EM,EIR,EIRS,EMSELF
- VE – VE,VER,VIS,VERSELF
- XE – XE,XEM,XYR,XYRS,XEMSELF
- ZE-HIR – ZE,HIR,HIR,HIRS,HIRSELF
- ZE-ZIR – ZE,ZIR,ZIR,ZIRS,ZIRSELF
- OTHER – OTH

- When **OTHER** is selected, a free-text field opens for a more specific description. This field is limited to 50 characters.

Note: If nothing is entered in this field and the user clicks **Save**, the following message displays: *“Enter the specific pronoun provided by the patient.”*

- **Legal Sex**

Click in this field and a list displays. Select one of the following:

- FEMALE
- MALE
- UNKNOWN

- **Legal Document**

Click in this field and a list displays. Select one of the following:

- STATE BIRTH CERTIFICATE
- STATE MOTOR VEHICLE DRIVER’S LICENSE
- COURT ORDER
- PHYSICIAN STATE SPECIFIC DECLARATION
- STATE ID

- **Effective Date**

Enter the date that the patient’s legal sex will be effective from the legal document source. You can type the date or select the calendar on the right side of the field to choose a date.

- **Gender Identity**

The **Gender Identity** field enables the user to change the patient’s preference to the gender they identify with. Click in the field and select one or more of the following from the list:

- DECLINE TO ANSWER
 - When **DECLINE TO ANSWER** is selected, the only option displayed is DO NOT KNOW.
- DO NOT KNOW
 - When **DO NOT KNOW** is selected, the only option displayed is DECLINE TO ANSWER.
- IDENTIFIES AS FEMALE
- IDENTIFIES AS MALE

- NONCONFORMING GENDER
- TRANSGENDER FEMALE
- TRANSGENDER MALE
- OTHER
 - When **OTHER** is selected, a free-text field opens for a more specific description. This field is limited to 50 characters.

Note: If nothing is entered in this field and the user clicks **Save**, the following message displays: *“Enter the specific gender identity provided by the patient.”*

- **Sexual Orientation**

The **Sexual Orientation** field enables the user to change the patient’s preference to the sexual orientation they identify with. Click in the field and select one or more of the following from the list:

- DECLINE TO ANSWER
 - When **DECLINE TO ANSWER** is selected, the only option displayed is DO NOT KNOW.
- DO NOT KNOW
 - When **DO NOT KNOW** is selected, the only option displayed is DECLINE TO ANSWER.
- BISEXUAL
- LESBIAN / GAY / HOMOSEXUAL
- STRAIGHT / HETEROSEXUAL
- SOMETHING ELSE
 - When **SOMETHING ELSE** is selected, a free-text field opens for a more specific description. This field is limited to 50 characters.

Note: If nothing is entered in this field and the user clicks **Save**, the following message displays: *“Enter the specific sexual orientation(s) provided by the patient.”*

When all fields on the **SO/GI** tab are completed, click **Save** to save your changes or click **Cancel** to return to the **SO/GI** tab without saving your changes.

4.11.2 Editing SO/GI Information

To edit existing information on the **SO/GI** tab for a patient, click **Edit** to open the **SO/GI** Edit window (Figure 4-17).

Users also have the option to remove the information completely by clicking **Remove**.



Figure 4-17. SO/GI add information window

Use the scroll bar on the right side of the window (Figure 4-18) to view all the fields.

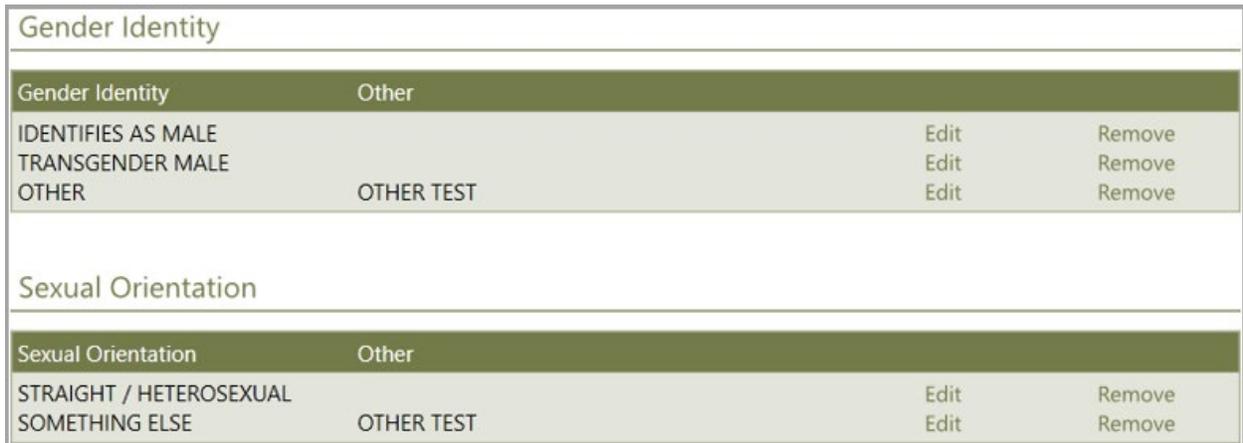


Figure 4-18: Edit or remove SO/GI tab fields example

Refer to Section 4.11.1 for information on each field.

4.11.2.1 Editing the Pronoun Field

Users have the option to edit or remove existing pronoun information.

- Click **Edit** on the line you want to change. The **Pronouns** edit window (Figure 4-19) opens.

Figure 4-19: **Pronouns** edit window

- Click in the **Pronoun** field to display a list. Select a new pronoun.
- If **Other** is selected, a free-text field opens for typing a more specific description.
- Click **Save**.
- To exit without saving the information, click **Cancel**.

4.11.2.2 Editing the Legal Sex Field

Users have the option to edit or remove existing legal sex and legal document information.

- Click **Edit** on the line you want to change. The **Legal Sex** edit window opens (Figure 4-20).

Figure 4-20: **Legal Sex** edit window

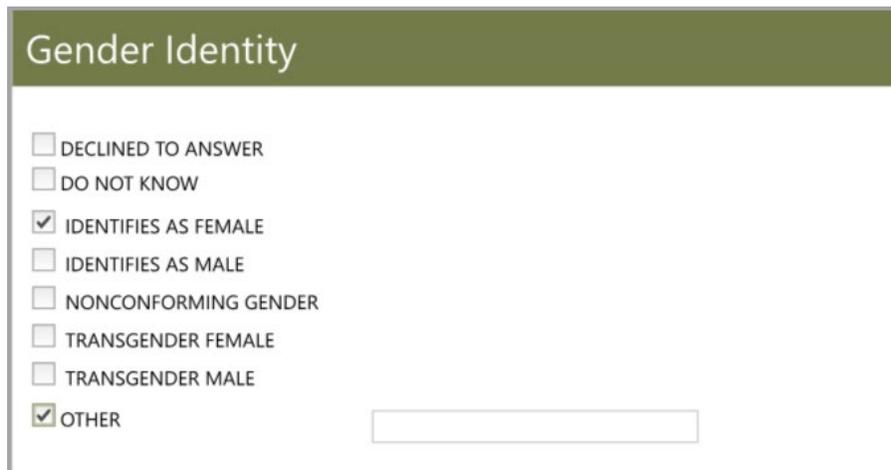
- To change the legal sex, click in the **Legal Sex** field to display a list. Select from the list.

- To change the legal document, click in the **Legal Document** field display a list. Select from the list.
- Click **Save**.
- To exit without saving the information, click **Cancel**.

4.11.2.3 Editing the Gender Identify Field

Users have the option to edit or remove existing gender identity information.

- Click **Edit** on the line you want to change. The **Gender Identity** edit window opens (Figure 4-21).



The screenshot shows a window titled "Gender Identity" with a list of radio button options. The options are: "DECLINED TO ANSWER", "DO NOT KNOW", "IDENTIFIES AS FEMALE", "IDENTIFIES AS MALE", "NONCONFORMING GENDER", "TRANSGENDER FEMALE", "TRANSGENDER MALE", and "OTHER". The "IDENTIFIES AS FEMALE" and "OTHER" options are selected. A text input field is visible next to the "OTHER" option.

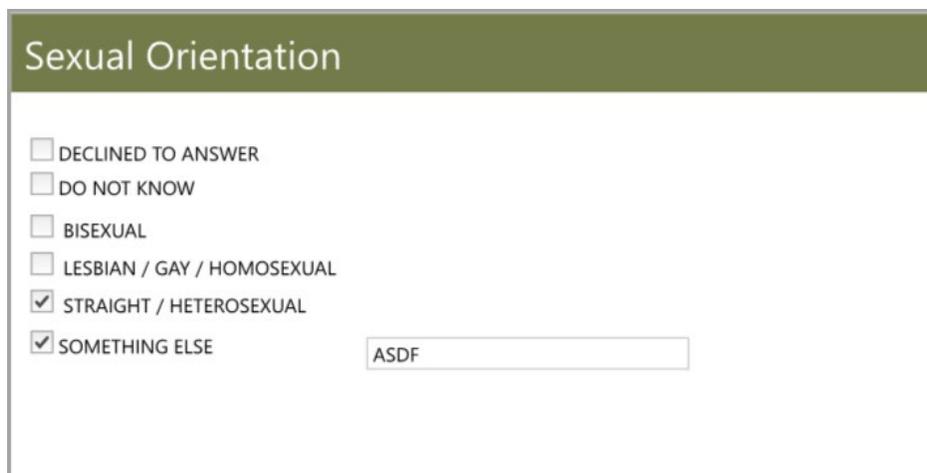
Figure 4-21: **Gender Identify** edit window

- To change the gender identity, select from the list.
- If **Other** is selected, a free-text field opens for typing a more specific description.
- If **Declined to Answer** or **Do Not Know** are selected, the complete list disappears, and those two selections remain. To return to the complete list, clear the checkmark in either selection.
- Click **Save**.
- To exit without saving the information, click **Cancel**.

4.11.2.4 Editing the Sexual Orientation Field

Users have the option to edit or remove existing sexual orientation information.

- Click **Edit** on the line you want to change. The **Sexual Orientation** edit window opens (Figure 4-22).



Sexual Orientation

DECLINED TO ANSWER

DO NOT KNOW

BISEXUAL

LESBIAN / GAY / HOMOSEXUAL

STRAIGHT / HETEROSEXUAL

SOMETHING ELSE

ASDF

Figure 4-22: **Sexual Orientation** edit window

- To change the sexual orientation information, select from the list.
- If **Something Else** is selected, a free-text field opens for typing a more specific description.
- If **Declined to Answer** or **Do Not Know** are selected, the complete list disappears, and those two selections remain.
- Click **Save**.
- To exit without saving the information, click **Cancel**.

5.0 Benefits Tab

The **Benefits** tab (Figure 5-1) and the separate tabs within it contain information about the benefits available to the selected patient.



Figure 5-1: **Benefits** tab

The **Benefits** tab includes these sections, all of which are accessible via tabs at the top of the Workspace:

- **Alternate Resources** tab
- **Sequencing** tab
- **Benefits Cases** tab
- **Prior Authorizations** tab

These tabs and the information on them are described in detail in the remainder of this section.

5.1 Alternate Resources Tab

The **Alternate Resources** tab displays medical insurance data for the current patient and provides a way to add to or edit this information. Figure 5-2 shows an example of the **Alternate Resources** tab display.

The screenshot shows the 'Alternate Resources' tab selected in a navigation bar. Below the navigation bar, there are two main sections: 'AOB & ROI' and 'Alternate Resources'.

AOB & ROI Section:

- Buttons: Change, AOB & ROI
- Assignment of Benefits: 04/06/2019
- Release of Information: 04/06/2019

Alternate Resources Section:

- Status: Active (dropdown menu)
- Buttons: Add, Insurance, Guarantor
- CLASSIC MEDICAID (Main Title)
- MEDICAID (Sub-Title)
- Status: Active
- View Detail (button)

Subscriber	Policy No.	Address	Start Date	End Date	Coverage
DEMO,PATIENTE	123456789	341 ABCD ROAD ALBUQUERQUE, NEW MEXICO, 88888	01/01/2019		023

Figure 5-2: **Alternate Resources** tab example

The **Alternate Resources** tab has two primary sections: the **AOB & ROI** section and the **Alternate Resources** section.

5.1.1 AOB & ROI Section

The **AOB & ROI** section of the **Alternate Resources** tab displays dates pertaining to the Assignment of Benefits (AOB) and Release of Information (ROI). Click **AOB & ROI** on the right of the page to edit and view this information:

- **Assignment of Benefits.** Use this field to enter the date that an Assignment of Benefits (AOB) has been obtained from or signed by the patient. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view. A historical log showing dates when previous AOBs were obtained displays below this field.
- **Release of Information.** Use this field to enter the date that a Release of Information (ROI) has been obtained from or signed by the patient. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view. A historical log showing dates when previous ROIs were obtained displays below this field.

After making any changes or additions to the AOB or ROI information, click **Save** to save your changes and return to the **Alternate Resources** tab or click **Cancel** to return to the **Alternate Resources** tab without saving your changes.

5.1.2 Alternate Resources Section

The **Alternate Resources** section of the **Alternate Resources** tab lists insurance resources available to the selected patient.

Use the **Status** filter list to display the patient's insurance policies by their status. You can choose to show only active, inactive, or all policies.

If necessary, use the scroll bar on the right side of the page to view the entire list.

Click **View Detail** to the right of any of the alternate resources displayed to view or edit the information about that resource.

5.2 Adding Insurance

Click **Insurance** on the right side of the **Alternate Resources** tab to display the **Add Insurance** page and add insurance policy information to the patient's records. Initially, only the **Search Insurer** search box displays. Click within the search box and type one or more of the letters contained in the insurer's name to display a list of search results, and then select the insurer of your choice from the list displayed.

Once you select the insurer, a form displays for the entry of the patient's policy information. Different forms display based on the type of insurer selected. See Sections 5.2.1 through 5.2.8 of this manual for a listing of the fields shown on each of these different forms.

5.2.1 Adding Private Insurance Coverage

In the case of private insurers, two different forms are provided: One for when the patient is the policy holder (Figure 5-3) and another for when a different person is the policy holder (Figure 5-4).

5.2.1.1 Private Insurance Fields (Patient is the Policy Holder)

Click **Same** on the right of the page to enter insurance information when the patient is the policy holder. Figure 5-3 shows an example of the form. Required fields are noted on the form.

Figure 5-3: **Private Insurance** page example

When the patient is the policy holder, the fields listed in Table 5-1 are provided. Required fields are noted on the form.

Table 5-1: **Private Insurance** page fields (Patient is Policy Holder)

Field	Notes
Policy Holder	To specify the current patient as the policy holder, click Same on the right side of the page. The patient data will be used to populate the fields for the policy holder.
Relationship	Auto-populated with SELF
Policy Number	3 to 20-character string
Coverage Type	Choose from list
Eligibility Start Date	Date field
Eligibility End Date	Date field

Field	Notes
Member Number	1 to 20-character string. Use this field to show the member number of the policy holder, if any.
Person Code	2 to 10-character string. Use this field to show the policy holder's person code, which is used to uniquely identify each family member.
Primary Care Provider	Patient's Primary Care provider in LAST, FIRST format. This is usually required for HMO/Managed Care plans.
Card Copy on File	Check box: Enable to indicate Yes
Date Obtained	Date field

5.2.1.2 Private Insurance Fields (New Policy Holder)

To add a policy holder who is not the patient, click within the **Policy Holder** field and type the first few letters of the person's last name to display a list of available search results. Click on a name to populate the field.

If no name can be found, then a new policy holder will need to be added for this patient. Click **New** on the right of the page to enter insurance information when someone other than the patient is the policy holder. Figure 5-4 shows an example of the form. Required fields are noted on the form.

Figure 5-4: New Private Insurance **Policy Holder** page example

When adding someone other than the patient as the policy holder, the fields listed in Table 5-2 are provided.

Table 5-2: Private Insurance Page fields (New Policy Holder)

Field	Notes
Policy Holder	Use this field to specify the new policy holder's name.
Birth Sex	Use this field to identify the policy holder's sex at birth. Choose from the list to specify either Male, Female, or Unknown.
Date of Birth	Date field
Phone Number	Policy holder's phone number
Street	Policy holder's street address
City	Policy holder's city
State	Policy holder's state
Zip Code	Policy holder's Zip Code. Accepts Zip+4-digit extension.
Employment Status	Choose from list: Policy Holder's employment status
Employer	Search box: Policy holder's employer. Employers can be added to the list of employers through the Table Maintenance page of the Setting module. See Section 9.4 for more information about adding employers.
Policy Number	3 to 20-character string. If no policy number is available, use the policy holder's Social Security Number.
Name on Card	Enter the name as it appears on the insurance card.
Group Name	Search box: Insurance policy group name (3 to 30-character string). See Section 9.3 for more information about adding employer group insurances.
Group Number	This field populates based on the entered Group Name. (3 to 17-character string)
Coverage Type	List field: Populates based on the coverage types available for the selected Insurance
Effective Date	Date field
Expiration Date	Date field

To begin, enter the policy holder's name in the **Policy Holder** search box using the LAST,FIRST [MIDDLE] format to search the list of registered patients.

If a matching name is found, click it to populate the field.

If a matching name is not found, then the newly entered policy holder's name will be added once the form has been completed. Note that the new policy holder name will be associated only with the insurance provider you previously selected.

After you have entered the necessary information on the form, click **Save** to save the information in the patient's record, or click **Cancel** to exit from the form without saving the information.

Once the form is saved, click **View Policy Holder Detail** on the right side of the page to view additional information about the policy holder and to add other policy members.

5.2.2 Adding New Policy Members to Private Insurance

More than one person can be associated with a private insurance policy. After adding a private insurance policy, click **View Policy Holder Detail** on the right side of the form to see the **Policy Holder** page (Figure 5-5).

Policy Holder

Policy Holder [required] Birth Sex [required] Date of Birth [required] Phone Number [required]
 DEMO,REGISTERA MIDNAME MALE 9/17/1980

Street [required]
 87 ROUND TREE

City [required] State [required] Zip Code [required]
 ALBUQUERQUE NEW MEXICO 87123

Employment Status [required] Employer [required]
 UNKNOWN

Policy Number [required] Name on Card [required] Group Name [required] Group Number [required]
 123456789

Coverage Type [required] Effective Date [required] Expiration Date [required]
 4/25/2020 Enter date

Policy Members Add Edit

Insured Name	Start Date	End Date	Relationship	Active
DEMO,REGISTERA MIDNAME	04/25/2020		SELF	Active

Save Cancel

Figure 5-5: **Policy Holder** and **Policy Members** page example

Once the **Policy Holder** and **Policy Members** page is displayed, click **Add** on the right side of the **Policy Members** heading bar to display the **Add Policy Member** section (Figure 5-6) and to add other policy members to this plan. Required fields are noted on the form.

Figure 5-6: Private insurance **Add Policy Member** section example

When adding a new policy member, the fields listed in Table 5-3 are provided.

Table 5-3: **Add Policy Member** section fields

Field	Notes
Insured Name	Search box: Insured person’s name in LAST,FIRST [MIDDLE] format for a registered patient
Relationship	Choose from the list to indicate the insured person’s relationship to the policy holder
Eligibility Start Date	Date field
Eligibility End Date	Date field
Member Number	1 to 20-character string
Person Code	2 to 10-character string
Primary Care Provider	Patient’s Primary Care provider in LAST,FIRST format. This is usually required for HMO/Managed Care plans.

After completing the form, click **OK** to close the form. If you need to make changes to an existing policy member, select their name from the listing and click **Edit** on the right side of the **Policy Members** heading bar. After completing all changes for the policy members, click **Save** to save the new policy member information.

5.2.3 Adding Medicare Coverage

If the insurance provider is Medicare, the window shown in Figure 5-7 displays. Required fields are noted on the form. If Medicare Coverage Type D is selected, additional fields display on the form; this is reflected in the example shown in Figure 5-7.

The screenshot shows a patient record for 'MEDICARE, ABBY' with SSN 105060740P and HRN 999103. The Medicare form is titled 'Add/Edit Medicare Eligibility' and includes the following fields:

- Start Date** [required]: 1/1/2018
- Coverage Type** [required]: D
- End Date** [required]: Enter date
- Medicare Name**: MEDICARE, ABBY
- Sex**: FEMALE
- Date of Birth**: 6/7/1940
- Person Code**: (empty)
- ID Number**: (empty)
- Plan Name**: D-CIGNA MEDICARE RX
- Group Name**: (empty)

Buttons for 'OK', 'Cancel', 'Save', and 'Cancel' are visible at the bottom of the form.

Figure 5-7: Medicare Insurance page example

5.2.3.1 Medicare Insurance Fields

The fields shown in Table 5-4 and Table 5-5 are provided on the **Medicare** insurance page.

Table 5-4: **Medicare** insurance page fields

Field	Notes
Medicare Name	Patient’s name in LAST, FIRST [MIDDLE] format. Show the name of the patient as printed on the Medicare card. This is the primary insured person. Verify that the patient’s name appears pre-printed on the ID card. If the name on the card is incorrect, enter it as it appears on the card, and then instruct the patient to contact Medicare directly to correct the name on the card.
Medicare HICN Number	Patient’s Medicare Health Insurance Claim Number (HICN). Use this field to show the Medicare HICN number, without the suffix, using nine digits.
Suffix	Choose from list: Suffix shown on the Medicare ID card
QMB/SLMB	Select the appropriate option from the list. QMB is Qualified Medical Beneficiary and SLMB is Specific Low Income Medical Beneficiary.

Field	Notes
Medicare MBI Number	Patient's Medicare Beneficiary Identifier (MBI) Number. Use this field to show the Medicare MBI number, using eleven alphanumeric characters.
Insurer	Automatically populated, read-only
Primary Care Provider	Patient's Primary Care physician in LAST,FIRST format
Date of Birth	Date field: Enter the patient's date of birth (DOB) exactly as printed on the Medicare card. If the DOB on the card is incorrect, use the one on the card, and then instruct the patient to contact Medicare directly to correct the DOB on the ID card.
Card Copy on File	Check box: enable to indicate a copy of the patient's Medicare card was obtained and placed into the chart.
Date Obtained	Date field (only available to edit if Card Copy On File check box is selected): Enter the date the Medicare card was placed into patient's chart.
Medicare Release Date	Date field: Show the date the Medicare release of information was added to the patient's records.
IMP MSG FORM SIG OBTAINED	Date field: Enter date the "Important Message from Medicare" form was obtained and entered into the patient's chart.

Table 5-5: **Medicare** insurance page fields: Add/Edit Medicare Eligibilities section

Field	Notes
For All Coverage Types:	
Start Date	Date field
Coverage Type	Choose from list
End Date	Date field
Additional Fields for Coverage Type D only:	
Medicare Name	Patient's name in LAST,FIRST [MIDDLE] format.
Birth Sex	Use this field to identify the policy holder's sex at birth. Choose from the list to specify either Male, Female, or Unknown.
Date of Birth	Date field
Person Code	2 to 10-character string: Use this field to show the policy holder's person code. This code is used to uniquely identify each family member.
ID Number	6 to 30-character string: Enter the ID number as it appears on the patient's Medicare card.
Plan Name	Search box: Enter the Insurer administering this Part D Medicare coverage.
Group Name	Employer Group Insurance search box

After the form has been finalized, click **OK** to close the **Add/Edit Medicare Eligibility** form.

To make changes to an existing Medicare Eligibility, select the eligibility, click **Edit**, and then make any changes to it.

To remove a Medicare Eligibility, click **Remove** before the policy has been saved.

Once the **Add/Edit Medicare Eligibility** form has been closed, the **MSP Surveys** section (Figure 5-8) can be viewed at the bottom of the form.

Figure 5-8: MSP Surveys section

5.2.3.2 MSP Surveys

Medicare Secondary Payer (MSP) is a term used to describe a situation where Medicare is considered to be the secondary payer based on other insurance coverage or a medical condition the patient may have. The MSP Survey is a questionnaire used as a tool to determine if Medicare is a patient's primary or secondary payer.

Note: When billing Medicare Part A, the MSP questionnaire must be given every 90 days as required by Medicare. It is recommended that the questionnaire also be done for Medicare Part B every 90 days, but this is not a legal requirement.

MSP surveys are offered in both short and long versions.

Click **Add Short** to add the short form version of the MSP survey. The short form survey is useful for cases where it has already been determined that Medicare is the patient's secondary payer. The short form includes the fields shown in Table 5-6:

Table 5-6: **MSP Survey** section fields

Field	Description
Date Survey Was Given	Date field
Signature Date	Date field
Medicare Secondary Reason	Choose from list

Field	Description
MSP Patient	Check box: Enable to indicate Yes
Completed By	Search box: Enter name of person completing the form.

After you have entered the necessary information on the form, click **OK** to save the survey information in the patient’s record, or click **Cancel** to exit from the form without saving the information.

Click **Add Long** to add the long form version of the MSP survey. The long form survey is a useful tool for determining if the patient has a non-Medicare primary payer. The long form survey is an automated version of the standard Medicare MSP survey. As a result, the questions asked in this survey will vary depending on answers to previous questions. Answer the questions asked and follow any prompts displayed to complete the long form MSP survey. After you enter the necessary information on the form, click **Save** to save the survey information in the patient’s record, or click **Cancel** to exit from the survey form without saving the information.

Note that you should ensure any Medicare eligibility information entered has been saved before completing the long form MSP survey. Otherwise, any previously entered information can be lost.

To make changes to an existing MSP Survey, select the survey, click **Edit**, and then make any changes to it.

To remove an MSP Survey, select the MSP entry and click **Remove** before the policy has been saved.

Once the new information or edits have been completed for the Medicare policy, click **Save** to save the new policy information, or click **Cancel** to exit without saving the information.

5.2.3.3 Editing Medicare Coverage

To edit information about a patient’s Medicare coverage, click **View Detail** in the **Medicare** section (Figure 5-9) of the **Alternate Resources** page.

MEDICARE		MEDICARE	Active	View Detail
Subscriber	DEMO,PATIENTB	Start Date	End Date	Coverage
Policy No.	3VV4PP2PP44	01/01/2017		A
Address	PO BOX 3111	01/01/2017		B
	MECHANICSBURG, PENNSYLVANIA, 17055-1857	01/01/2017		D-MEDCO-610014-M
	(855)252-8782			

Figure 5-9: **Medicare** section of the **Alternate Resources** page

This displays the **Medicare** page for the selected patient, as shown in Figure 5-10.

DEMO,PATIENTB	SSN XXX-XX-1139 Show	Eligibility Status CHS & DIRECT View	RHI NO
03/11/1939 (80y) MALE	HRN 999349	Active Insurance YES	Sensitive NO
	Last Updated 6/5/2019 (TOWN)	PCP	Veteran NO

Medicare			
Medicare Name <small>[required]</small>	Medicare HICN Number <small>[required]</small>	Suffix <small>[required]</small>	QMB/SLMB
DEMO,PATIENTB			
Medicare MBI Number <small>[required]</small>			
3VV4PP2PP44			
Insurer	Primary Care Provider	Date of Birth <small>[required]</small>	
MEDICARE		3/11/1939	
Card Copy on File <input type="checkbox"/>	Date Obtained <small>Enter date</small>	Medicare Release Date <small>[required]</small>	IMP MSG FORM SIGN OBTAINED
		12/13/2017	3/7/2019

Medicare Eligibilities					Add	Edit
Start Date	Coverage	End Date	Plan	Group		
01/01/2017	A					
01/01/2017	B					
01/01/2017	D		D-MEDCO-610014-MEDPRIME			

MSP Surveys						Add Short	Add Long	Edit
Date Survey Given	Signature Date	MSP Patient	Medicare Secondary Reason	Completed By				
03/22/2018		NO	EMPLOYER GROUP HEALTH PLAN (EGHP)					

[Save](#) [Cancel](#)

Figure 5-10: **Medicare** page for an individual patient

Once displayed, the various fields in the **Medicare** section of the **Medicare** page can be edited as needed. See Section 5.2.3.1 for descriptions of the fields displayed.

You can also add or edit information in the **Medicare Eligibilities** section of the page. Click **Add** to add a new Medicare Eligibility (as described in Section 5.2.3.1) or select an existing eligibility and click **Edit** to make any changes to it.

Within the **MSP Surveys** section of the page, click **Add Short** or **Add Long** to add a short or long form MSP Survey. To edit an existing MSP Survey, select the survey and click **Edit**.

5.2.4 Adding Medicaid Coverage

If the insurance provider is Medicaid, these fields are provided. Required fields are noted on the form.

DOE,JOHN
07/06/1957 (54y) MALE
SSN XXX-XX-5555
HRN 357951
Last Updated 2/3/2012 (ADMI)
Eligibility Status CHS & DIRECT
Active Alternate Resource
PCP
RHI NO
Sensitive NO
Veteran YES

Medicaid - NEW MEXICO MEDICAID

<input type="text" value="DOE,JOHN"/>	<input type="text"/>	<input type="text" value="SEARCH"/>	<input type="text"/>
<input type="text" value="SEARCH"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="7/6/1957"/>	<input type="text" value="SELF"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="Enter date"/>		

Add/Edit Medicaid Eligibility

<input type="text" value="Enter date"/>	<input type="text"/>	<input type="text" value="Enter date"/>
-----------------------------------------	----------------------	-----------------------------------------

Figure 5-11: Medicaid Insurance page example

5.2.4.1 Medicaid Insurance Fields

The fields shown in Table 5-7 and Table 5-8 are provided on the **Medicaid** insurance page.

Table 5-7: Medicaid insurance page fields

Field	Notes
Medicaid Name	Patient's name in LAST, FIRST [MIDDLE] format. Show the name of the patient as printed on the Medicaid card. This is the primary insured person. Verify that the patient's name appears pre-printed on the ID card. If the name on the card is incorrect, enter it as it appears on the card, and then instruct the patient to contact Medicaid directly to correct the name on the card.
Medicaid Number	Patient's Medicaid Number. Use this field to show the Medicaid ID number without the suffix. Must be 6 to 30 characters long.
Group Name	Search box: This is the local group name and can be found on the patient's Medicaid card. See Section 9.3 for more information about adding group insurances.
Group Number	Automatically populated based on the selected group name

Field	Notes
Plan	Search box: Click within the box and type one or more of the letters contained in the plan name to display a list of search results, and then select the Medicaid plan from the list shown.
State	Choose from list
Primary Care Provider	Patient's Primary Care provider under Medicaid in LAST, FIRST name format.
Rate Code	1 to 6-character string
Insured Name	Enter the full name of the primary insured person with this account number. Must be 3 to 30 characters long, in LAST, FIRST [MIDDLE] name format.
Date of Birth	Date field
Relation	Choose from list: Patient's relationship to the insured
Card Copy on File	Check box: Enable to indicate if the patient's Medicaid card copy was obtained and placed into the chart.
Date Obtained	Date field: This is the date the patient's Medicaid card copy was obtained and placed into the chart.

Table 5-8: **Medicaid** Insurance page fields: Add/Edit Medicaid Eligibility Section

Field	Name
Eligibility Date	Date field
Coverage Type	1 to 2-character string
End Date	Date field

After completing the form, click **OK** to close the **Add/Edit Medicaid Eligibility** form.

To make changes to an existing Medicaid Eligibility, select the eligibility, click **Edit**, and then make any changes.

To remove a Medicare Eligibility, click **Remove** before the policy has been saved.

Once the new information or edits have been completed, click **Save** to save the new policy information, or click **Cancel** to exit without saving the information.

5.2.4.2 Editing Medicaid Coverage

To edit information about a patient's Medicaid coverage, click **View Detail** in the **Medicaid** section (Figure 5-12) of the **Alternate Resources** page.

NEW MEXICO MEDICAID		MEDICAID	Active	View Detail
Subscriber	DEMO,ALLISON			
Policy No.	123456789			
Address	PO BOX 26500 ALBUQUERQUE, NEW MEXICO, 87125-6500 (505)246-9988			
Start Date	End Date	Coverage		
06/01/2018	07/31/2018	GUA		
08/01/2018	12/31/2018	32		
01/01/2019	03/31/2019	02		
07/01/2019		32		

Figure 5-12: Medicaid section of the Alternate Resources page

This displays the **Medicaid** page for the selected patient, as shown in Figure 5-13.

Medicaid - MEDICAID

Medicaid Name <small>[required]</small>	Medicaid Number <small>[required]</small>	Group Name	Group Number
<input type="text" value="DEMO,PATIENTE"/>	<input type="text" value="123456789"/>	<input type="text"/>	<input type="text"/>
Plan	State <small>[required]</small>	Primary Care Provider	Rate Code
<input type="text" value="CLASSIC MEDICAID"/>	<input type="text" value="NEW MEXICO"/>	<input type="text"/>	<input type="text"/>
Insured Name	Date of Birth <small>[required]</small>	Relation <small>[required]</small>	
<input type="text" value="DEMO,PATIENTE"/>	<input type="text" value="6/14/2017"/>	<input type="text" value="SELF"/>	
Card Copy on File	Date Obtained		
<input checked="" type="checkbox"/>	<input type="text" value="11/17/2018"/>		

Medicaid Eligibilities Add Edit

Start Date	End Date	Coverage
07/01/2017	12/31/2017	002
02/01/2018	08/31/2018	32
01/01/2019		023

Figure 5-13: **Medicaid** page for an individual patient

Once displayed, the various fields in the **Medicaid** section of the **Medicaid** page can be edited as needed. See Section 5.2.4.1 for descriptions of the fields displayed.

You can also add or edit information in the **Medicaid Eligibilities** section of the page. Click **Add** to add a new Medicaid Eligibility (as described in Section 5.2.4.1) or select an existing eligibility and click **Edit** to make any changes to it.

5.2.5 Adding Railroad Retirement Insurance

Railroad Retirement Insurance is, in essence, a form of Medicare. For this reason, adding Railroad Retirement Insurance is similar to adding Medicare. When the insurance provider is Railroad Retirement, the page shown in Figure 5-14 displays. Required fields are noted on the form.

RAILROAD,PATIENTA		SSN 606101738P	Eligibility Status CHS & DIRECT View	RHI NO
10/17/1938 (79y) MALE		HRN 999100	Active Insurance YES	Sensitive NO
		Last Updated 3/6/2018 (TOW)	PCP	Veteran NO

Railroad Retirement			
Railroad Name [required]	Railroad HICN Number [required]	Prefix [required]	QMB/SLMB
RAILROAD,PATIENTA	321443214	AB	
Railroad MBI Number [required]			
3CD4CD5CD33			
Insurer	Primary Care Provider	Date of Birth [required]	
RAILROAD RETIREMENT		10/17/1938	
Card Copy on File	Date Obtained		
<input type="checkbox"/>	Enter date		

Railroad Eligibilities				
Start Date	Coverage	End Date	Plan	Group
01/01/2017	A	01/31/2017		

[Add](#) [Edit](#)

[Save](#) [Cancel](#)

Figure 5-14: Railroad Retirement Insurance page example

5.2.5.1 Railroad Retirement Insurance Policy Fields

The fields shown in Table 5-9 and Table 5-10 are provided on the **Railroad Retirement Insurance** page.

Table 5-9: Railroad Retirement Insurance policy fields

Field	Notes
Railroad Name	Automatically populated with patient's name in LAST,FIRST [MIDDLE] format.
Railroad HICN Number	Patient's Railroad Health Insurance Claim Number (HICN). Use this field to show the Railroad HICN number (6- or 9-digits length)
Prefix	Choose from list: Prefix for Medicare billing
QMB/SLMB	Select the appropriate option from the list. QMB is Qualified Medical Beneficiary and SLMB is Specific Low Income Medical Beneficiary.
Railroad MBI Number	Patient's Railroad Beneficiary Identifier (MBI) Number. Use this field to show the Railroad MBI number, using eleven alphanumeric characters.
Insurer	Automatically populated with the insurer's name.
Primary Care Provider	Patient's Primary Care physician in LAST,FIRST format.
Date of Birth	Date field
Card Copy on File	Check box: Enable to indicate Yes
Date Obtained	Date field

Table 5-10: **Railroad Retirement Insurance** policy fields: Railroad Eligibility Section

Field	Name
For all Types:	
Start Date	Date field
Coverage Type	Choose from list
End Date	Date field
Additional Fields for Type D:	
Railroad Name	Patient's name in LAST,FIRST [MIDDLE] format. Show the name of the patient as printed on the Medicaid card.
Gender	Choose from list
Date of Birth	Date field
Person Code	2 to 10-character string: Use this field to show the policy holder's person code. This code is used to uniquely identify each family member.
ID Number	1 to 30-character string: Enter the ID number as it appears on the patient's Railroad Insurance card.
Plan Name	Search box: Enter the Insurer administering this Part D Medicare coverage.
Group Name	Search box: Employer Group Insurance name

After the form has been finalized, click **OK** to close the **Add/Edit Railroad Eligibility** form.

To make changes to an existing Railroad Eligibility, select the eligibility, click **Edit**, and then make any changes to it.

To remove a Railroad Eligibility, click **Remove** before the policy has been saved.

Once the **Add/Edit Railroad Eligibility** form has been closed, the **MSP Surveys** section (Figure 5-15) can be viewed at the bottom of the form.

MSP Surveys				
Date Survey Given	Signature Date	MSP Patient	Railroad Secondary Reason	Completed By

Figure 5-15: Railroad Retirement Insurance **MSP Surveys** section

5.2.5.2 Railroad Retirement Insurance MSP Surveys

Medicare Secondary Payer (MSP) is a term used to describe a situation where Railroad Retirement Insurance is the secondary payer based on other insurance coverage or a medical condition the patient may have. The MSP Survey is a questionnaire used as a tool to determine if Railroad Retirement Insurance is a patient's primary or secondary payer.

Note: When billing Railroad Insurance Part A, the MSP questionnaire must be given every 90 days as required by Medicare. It is recommended that the questionnaire also be done for Railroad Insurance Part B every 90 days, but this is not a legal requirement.

For Railroad Retirement Insurance, Medicare Secondary Payers (MSP) surveys are offered in only the short version.

Click **Add** to add the MSP survey. The form displayed includes the fields shown in Table 5-11.

Table 5-11: **MSP Survey** section fields

Field	Description
Date Survey Was Given	Date field
Signature Date	Date field
Medicare Secondary Reason	Choose from list
MSP Patient	Check box: Enable to indicate Yes
Completed By	Search box: Enter name of person completing the form.

After you have entered the necessary information on the survey form, click **OK** to save the information in the patient's record, or click **Cancel** to exit from the survey form without saving the information.

To make changes to an existing MSP Survey, select the survey, click **Edit**, and then make any changes to it. If an existing MSP survey needs to be removed, click **Remove** before the policy has been saved.

After you have entered the necessary information on the Railroad Retirement policy, click **Save** to save the policy information in the patient's record, or click **Cancel** to exit from the form without saving the information.

5.2.6 Adding Third Party Liability Insurance

When the insurance provider is a third-party liability insurance provider, the page shown in Figure 5-16 display. Required fields are noted on the form.

Figure 5-16: **Third Party Liability** insurance page example

The fields shown in Table 5-12 through

Table 5-15 are provided on the **Third Party Liability** insurance page.

Table 5-12: **Third Party Liability** insurance fields

Field	Notes
Injury Date	Date field
Cause of Injury	Description of what caused the injury: 3 to 30-character limit.
Description of Injury	Description of the injury: 3 to 45-character limit

Table 5-13: **Third Party Liability** insurance fields: Responsible Party Section

Field	Name
Name	Responsible party's name in LAST,FIRST format
Social Security Number	Responsible party's Social Security Number

Table 5-14: **Third Party Liability** insurance fields: Insurer Information Section

Field	Name
Insurer	Search box: Enter the Third Party Liability insurer
Effective Date	Date field
End Date	Date field
Policy Number	Enter the policy number (3 to 45 characters in length.)
Group Name	Search box: Employer Group Insurance name

Field	Name
Group Number	Group's Insurance Number: Automatically populated when Group Name is entered.

Table 5-15: **Third Party Liability** insurance fields: Claim Information Section

Field	Name
Claim Number	3 to 15-character string
Contact Information	Basic contact information: 1 to 30 characters in length
Patient's Attorney	Patient's Attorney's name in LAST, FIRST format
Date Last Worked	Date the patient last worked
Disability Date	Date of patient's disability
Authorized Return to Work	Date the patient is authorized to return to work
Notes	Free-text field for any notes needed

After you have entered the necessary information on the form, click **Save** to save the information in the patient's record, or click **Cancel** to exit from the form without saving the information.

5.2.7 Adding Workman's Compensation Insurance

When the insurance is provided by Workman's Compensation, the page shown in Figure 5-17 displays. Required fields are noted on the form.

Figure 5-17: **Workmen's Compensation** insurance page example

The fields shown in Table 5-16, Table 5-17, and Table 5-18 are provided on the **Workmen's Compensation** insurance page.

Table 5-16: **Workman's Compensation** insurance fields

Field	Notes
Injury Date	Date field
Type of Accident	Description the type of accident: 3 to 45-character limit
Description of Injury	Description of the injury: 3 to 45-character limit

Table 5-17: **Workman's Compensation** insurance fields: Insurer Information Section

Field	Name
Workman's Comp Entity	Automatically populated with the Workman's Compensation entity
Effective Date	Date field
Expiration Date	Date field
Employer Name	Search box: Enter the name of the employer where the patient was employed at the time the injury occurred.
Group Name	Search box: Employer Group Insurance
Group Number	The Group's Insurance Number: Automatically populated when Group Name is entered.

Table 5-18: **Workman's Compensation** insurance fields: Claim Information Section

Field	Name
Claim Filed	Check box: Enable to indicate Yes
Claim Number	Enter the claim or policy number assigned to this work-related incident. This field accepts 3 to 15 characters, and in some cases may be the patient's SSN.
Claim Status	Choose from list
Date Last Worked	Date field
Authorized Return to Work	Date field
Patient's Attorney Name	Patient's Attorney's name in LAST,FIRST format.
Contact Info	Basic contact information: 1 to 30 characters in length
Disability Start Date	Date field
Disability End Date	Date field
Notes	Free-text field for any notes needed

After you have entered the necessary information on the form, click **Save** to save the information in the patient's record, or click **Cancel** to exit from the form without saving the information.

5.2.8 Adding a Guarantor

Click **Guarantor** on the right side of the **Alternate Resources** tab to display the **Guarantor** page (Figure 5-18) and add information about the guarantor to the patient’s records. Required fields are noted on the form.

The screenshot shows a web form titled "Guarantor". It contains several input fields and dropdown menus. The "Guarantor" field has a search icon and contains "DEMO,ALISTER LANE". "Reference Number" is "678910" and "PO Number" is "7654321". "Date of Birth" is "5/20/1980", "Birth Sex" is "MALE", and "Relation" is "BROTHER". There are fields for "Street" (containing "PO BOX 1302"), "City" (containing "ALB"), "State" (containing "NEW MEXICO"), and "Zip" (containing "87119"). Below this is a section titled "Add/Edit Guarantor Eligibility" with "Start Date" (6/23/2020) and "End Date" (9/22/2020). At the bottom right are "OK" and "Cancel" buttons.

Figure 5-18: Guarantor page example

The fields shown in Table 5-19 and Table 5-20 are provided on the **Guarantor** page.

Table 5-19: Guarantor fields

Field	Notes
Guarantor	Search Box: Search for an existing Guarantor, or you can add a new one by typing a name in this search box, then selecting the Add option displayed on the list. When adding a new Guarantor, enter the name using a LAST,FIRST format.
Reference Number	3 – 30-character string
PO Number	Purchase Order Number: 3 to 30-character string
Date of Birth	Date field
Birth Sex	Use this field to identify the guarantor’s sex at birth. Choose from the list to specify either Male, Female, or Unknown.
Relation	Choose from list to specify the guarantor’s relationship to the patient
Street	Guarantor’s street address
City	Guarantor’s city
State	Guarantor’s state
Zip Code	Guarantor’s Zip Code. Accepts Zip+4-digit extension.

Table 5-20: Guarantor fields: Guarantor Eligibilities Section

Field	Notes
Start Date	Date field

Field	Notes
End Date	Date field

After you have entered the necessary information on the **Add/Edit Guarantor Eligibility** form, click **OK** to save the eligibility.

To make changes to an existing eligibility, select the eligibility and click **Edit**.

To remove an existing eligibility, click **Remove** before the Guarantor policy has been saved.

Once the new information or edits have been completed for the Guarantor information, click **Save** to save the information in the patient's record. Click **Cancel** to exit from the form without saving the information.

5.3 Sequencing Tab

The **Sequence** tab displays medical insurance data for the current patient and provides a way to add to or delete sequencing information. Figure 5-24 shows an example of the **Sequencing** tab display.

Priority	Insurer	Coverage
1	UNITED HEALTH CARE	FAMILY
2	MEDICARE	B
3	MEDICARE	A
4	NEW MEXICO MEDICAID	GG

Priority	Insurer	Coverage
1	UNITED HEALTH CARE	FAMILY
2	MEDICARE	B
3	NEW MEXICO MEDICAID	GG

Figure 5-19: Sequencing tab example

Use the **Category** list box (Figure 5-20) to sort the listed assignments by **Medical**, **Dental**, **Optometry**, **Pharmacy**, **Mental Health**, **Auto Accident/Tort**, or **Workman's Comp**.

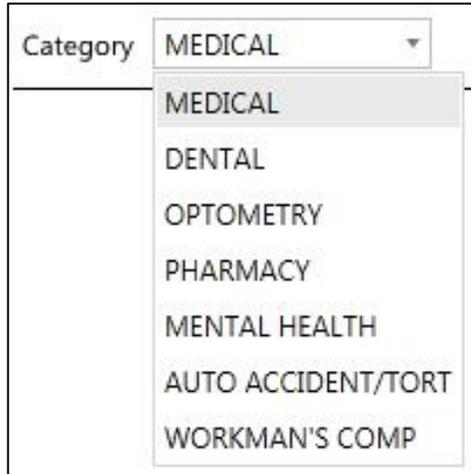


Figure 5-20: **Category** filter list box

If necessary, use the scroll bar on the right side of the page to view the entire list of sequence cases.

5.3.1 Adding a Sequence

Click **Add Sequence** to add a new sequence to the selected patient’s record. A page similar to that shown in Figure 5-21 displays.

Figure 5-21: **Add Sequence** page example

The **Add Sequence** page contains the fields shown in Table 5-21.

Table 5-21: **Add Sequence** fields

Field	Description
Category	Choose from list
Effective Date of Priority	Date Field
Sequence	Choose from list
Remove	Use to remove selected insurer from sequenced list
Insurer	Patient's Insurer
Coverage Type	Patient's Insurance Coverage Type
Policy Number	Patient's Insurance Policy Number
ELIG Begin	Date Field
ELIG End	Date Field

Use the **Sequence** button to select the insurer from the patient record to start sequencing insurers. A page similar to that shown in Figure 5-22 displays.

#	Insurer	Coverage Type	Effective Date
	DELTA DENTAL OF NEW MEXICO INC		01/01/2015
	MEDICARE	A	01/01/2015
	MEDICARE	B	01/01/2015
	MEDICARE	D-EXPRES	01/01/2015
	NEW MEXICO MEDICAID	GG	03/01/2015
	UNITED HEALTH CARE	FAMILY	01/01/2015
	VISION SERVICE PLAN (VSP)	FAMILY	02/01/2015

Figure 5-22: **Add Sequence** page example

Select the insurer to be sequenced first and continue to select insurers to complete the sequence. A page similar to that shown in Figure 5-23 displays.

Resource Sequence

Category [required] Effective Date of Priority [required]

Attached Sequences

#	Insurer	Coverage Type	Policy Number	ELIG Begin	ELIG End
1	UNITED HEALTH CARE	FAMILY	123456789	01/01/2015	
2	MEDICARE	B	123456789	01/01/2015	
3	MEDICARE	A	123456789	01/01/2015	
4	NEW MEXICO MEDICAID	GG	123456789	03/01/2015	

DELTA DENTAL OF NEW MEXICO INC 01/01/2015
 MEDICARE D-EXPRES 01/01/2015
 VISION SERVICE PLAN (VSP) FAMILY 02/01/2015

Save Cancel

Figure 5-23: **Add Sequence** page example

When done, click **Save** to save the sequence and add it to the patient’s record, or click **Cancel** to exit from the **Add Sequence** page without saving your changes.

5.4 Benefits Cases Tab

The **Benefits Cases** tab displays benefits case data for the current patient and provides a way to add to or edit this information. Figure 5-24 shows an example of the **Benefits Cases** tab display.

Profile **Benefits** Appointments ADT Warnings 4 Print

Alternate Resources **Benefits Cases** Prior Authorizations

Status All My Cases Sort By Date Assigned Add Case

Assigned To [redacted] Status **CLOSED** View Case Detail

Date Assigned 6/5/2013 Assigned By [redacted]

Reason

Obtained On	Application Type	Person Receiving	Overall Status
03/31/2014	SSI	[redacted]	PENDING

Add Application

Assigned To [redacted] Status **OPEN** View Case Detail

Date Assigned 3/4/2014 Assigned By [redacted]

Reason

Obtained On	Application Type	Person Receiving	Overall Status
03/31/2014	SOCIAL SECURITY	[redacted]	PENDING

Add Application

Page 1

Figure 5-24: **Benefits Cases** tab example

Use the **Status** list box to display the patient’s benefits cases by their status. You can choose to show Open, Closed, or All cases.

Click **My Cases** to see a listing of benefits cases that have only been assigned to you. Click the button again to show all the benefits cases established for the selected patient.

Use the **Sort By** list box to display the patient's benefits cases grouped by either their status (active or inactive) or by the date they were assigned.

If necessary, use the scroll bar on the right side of the page to view the entire list of benefits cases. Also, if necessary, use the right and left arrows at the lower left of the screen to switch between multiple pages of listings.

5.4.1 Adding a Benefits Case

Click **Add Case** to add a new benefits case to the selected patient's record. A page similar to that shown in Figure 5-25 displays.

Figure 5-25: **Add Case** page example

The **Add Case** page contains the fields shown in Table 5-22.

Table 5-22: **Add Case** fields

Field	Description
Patient	This field is automatically populated with the patient's name.
Case Type	Choose from list
Case Status	Choose from list
Assigned To	Search Box: Use this field to search for the user to whom the case is assigned.

Field	Description
Assigned By	Search Box: Use this field to search for the user who assigned the case.
Case Worker	Use this field to specify the name of the case worker for this benefits case. Use a LAST,FIRST name format when entering the Case Worker name.
Date Assigned	Date field
Case Number	Use this field to specify a unique identifying number for the case. When this field is used, the Case Number is displayed in the heading of the Add Case and Case Details pages. (The Case Details page is described in Section 5.4.2.)
Completed By	Search Box: Use this field to search for the user who completed the case.
Date Completed	Date field
Reason	Use this free-text field to enter a 3 to 45-character explanation for this particular benefits case.

When done, click **Save** to save the benefits case and add it to the patient's record, or click **Cancel** to exit from the **Add Case** page without saving your changes.

5.4.1.1 Adding a Benefits Case Application

Click **Add Application** on the **Add Case** page to add information about any benefits applications related to that particular benefits case. The fields displayed in the **Add Application** section are shown in Table 5-23.

Table 5-23: **Add Application** fields

Field	Description
Application Type	Use the Application Type list box to choose from a list of application types. Note that the application types available on this list are controlled by the Application Types option in the Table Maintenance section of the Settings Module. See 9.6 for more information about adding and editing application types.
Date Obtained	Use this field to specify when the benefits application was obtained. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
Received By	Use this search box to specify who received the benefits application.

When done, click **OK** to accept the application and add it to the benefits case, or click **Cancel** to exit from the **Add Application** section without saving your changes.

Once **OK** has been clicked and the application is added, a new section displays on the page (Figure 5-26).

Figure 5-26: Benefits Case application submission section

Click **Submit** to indicate that the application has been submitted. The **Submit Application** dialog (Figure 5-27) displays.

Figure 5-27: **Submit Application** dialog

The **Submit Application** dialog provides the fields shown in Table 5-24.

Table 5-24: **Submit Application** fields

Field	Description
Submitted By	Use this search box to specify who submitted the benefits case application.
Submitted Via	Use this list box to choose from a list of application submissions methods.
Submission Date	Use this field to specify when the benefits application was submitted. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
Submission Reason	Use this free-text field to enter 3 to 45 characters of text explaining the reason for this particular benefits case.

After entering any necessary information, click **OK** to add the application. The **Submit** button will no longer be available and the submission fields will be populated.

Click **Save** on the page displayed to save the submitted benefits application or click **Cancel** to cancel the application and return to the main **Benefits Cases** page.

5.4.2 Editing and Reviewing Benefits Case Details

Once a benefits case has been added to a patient's record, you can view and edit the case details. You can also add benefits applications to a specific case. Within the **Benefits Cases** tab, each individual case is displayed in a separate section. Figure 5-28 shows an example of an individual benefits case record.

Assigned To	REGISTRATION,USERA UR	Status	OPEN	View Case Detail
Date Assigned	6/25/2019	Assigned By	REGISTRATION,USERA UR	
Reason				
Applications				Add Application
Obtained On	Application Type	Person Receiving	Overall Status	
06/24/2020	MEDICAID	CLERK,REGISTRATION	PENDING	
06/24/2020	MEDICAID	CLERK,REGISTRATION	PENDING	
06/24/2020	MEDICAID	CLERK,REGISTRATION	PENDING	

Figure 5-28: Individual benefits case record example

Click **View Case Detail** to open the case record. Once open, you can view or edit any of these fields:

- Case Status
- Case Worker
- Date Assigned
- Case Number
- Completed By
- Date Completed
- Reason

When done, click **Save** to save any changes to the benefits case and add it to the patient's record, or click **Cancel** to exit from the **View Case detail** page without saving your changes.

Similarly, click **Add Application** to add a new application to the benefits case. Once open, you can view or edit any of the case details listed in Section 5.4.1, and you can add a new application using the fields described in Section 5.4.1.1. When done, click **OK** accept the application and add it to the benefits case, or click **Cancel** to exit from the **Add Application** section without saving your changes.

5.5 Prior Authorizations Tab

The **Prior Authorizations** tab displays prior authorizations and related data for the current patient and provides a way to add to or edit this information. Figure 5-29 shows an example of the **Prior Authorizations** tab.

The screenshot displays the 'Prior Authorizations' tab within a software application. At the top, there are navigation tabs for 'Profile', 'Benefits', 'Appointments', and 'ADT'. Below these, there are sub-tabs for 'Alternate Resources', 'Benefits Cases', and 'Prior Authorizations'. The interface includes filters for 'Type' (set to 'All') and 'Status' (set to 'All'), a 'Sort By' dropdown (set to 'Encounter Date'), and an 'Add Prior Authorization' button. Two authorization records are shown:

- Record 1:** Type: OUTPATIENT, Number: 654789, Visits Authorized: 2, Insurer: ALLENDALE MUTUAL GRP, Status: APPROVED, Date Authorized: 04/01/2014, Encounter Date: 03/05/2014. Authorizing contacts table shows a contact on 03/28/2014 by DAVIS, BOB.
- Record 2:** Type: INPATIENT, Prior-Auth Number: 123987, Days Authorized: (blank), Insurer: FEDERATED MUTUAL GRP, Status: PENDING, Date Authorized: (blank), Admission/Visit Date: 04/05/2012. Authorizing contacts table shows a contact on 04/07/2010.

At the bottom, there are navigation arrows and a 'Page 1' indicator.

Figure 5-29: **Prior Authorizations** tab example

Use the up and down navigation arrows and the scroll bar on the right side of the page to move between each prior authorization and to view the entire list.

Use the **Type** list box to display the patient's prior authorizations sorted by their type. You can choose to show Inpatient, Outpatient, or All prior authorization types.

Use the **Status** list box to display the patient's prior authorizations sorted by their status. Select one status from among these choices:

- **All**
- **Approved**
- **Authorization Not Needed**
- **Denied**
- **Entered In Error**
- **Follow Up Needed**
- **Pending**
- **Refused**
- **Re-submitted**

Use the **Sort By** list box to display the patient's prior authorizations grouped by:

- **Encounter Date**
- **Status**
- **Type**

5.5.1 Adding a Prior Authorization

Click **Add Prior Authorization** to add a prior authorization to the patient's records. A page similar to that shown in Figure 5-30 displays.

Figure 5-30: **Prior Authorization** page example

The **Prior Authorization** page contains the fields shown in Table 5-25:

Table 5-25: **Prior Authorization** page fields

Field	Description
Patient	This field is automatically populated with the patient's name.
Authorization Type	Choose from list
Admission/Visit Date	Date field
Insurer	Search Box: Use this field to specify the patient's insurer.
Authorization Number	Use this field to specify the authorization number (3 to 30 characters in length) for this patient's admission or visit.
Authorization Status	Choose from list
Authorization Date	Date field
Authorized Days	Use this field to specify the number of days authorized for this authorization instance.
Encounter Notes	Use this free-text field to enter a 3 to 45-character explanation regarding this specific authorization.

When done entering the appropriate information, click **Save** to save the information to the patient's record, or click **Cancel** to exit from the page without saving your changes.

5.5.1.1 Adding an Authorizing Contact

Click **Add Contact** on the **Add Prior Authorization** page to add an authorizing contact to the patient record. A form similar to that shown in Figure 5-31 displays.

Figure 5-31: **Authorizing Contact** form

The **Authorizing Contact** form contains the fields shown in Table 5-26.

Table 5-26: **Authorizing Contact** fields

Field	Description
Contact Date	Use this field to enter the date the authorization was made. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
Contact Person	Use this field to record the name of the contact person for this authorization.
Contact Notes	Use this field to enter any notes that may be useful for this particular prior authorization.

After entering the new authorization contact information, click **OK** to save your changes and return to the **Prior Authorization** details page, or click **Cancel** to return to the **Prior Authorization** details page without saving your changes.

5.5.1.2 Adding Additional Days/Visits

Click **Add Additional Days/Visits** on the **Add Prior Authorization** page to authorize additional inpatient care days or outpatient visits for the patient. This displays a form similar to that shown in Figure 5-32.

Figure 5-32: Add Additional Days/Visits form

The **Add Additional Days/Visits** form contains the fields shown in Table 5-27.

Table 5-27: Add Additional Days/Visits fields

Field	Description
Date Obtained	Use this field to enter the date the additional authorization was obtained. Manually enter the date using any of the accepted date formats or click the calendar icon to select the date from a calendar view.
Contact Person	Use this field to record the name of the contact person for this authorization.
Reference Number	Use this field to show the reference number for the additional authorization.
Days/Visits	Use this field to enter the number of additional days or visits authorized for the patient. The label for this field varies depending on the type of authorization. For Inpatient authorizations, enter the number of authorized additional days. For Outpatient authorizations, enter the number of authorized additional visits.
Notes	Use this field to enter any notes that may be useful for this particular authorization.

After adding more days or visits, click **OK** to save your changes and return to the **Prior Authorization** details page, or click **Cancel** to return to the **Prior Authorization** details page without saving your changes.

5.5.2 Editing and Reviewing Prior Authorization Details

Once a prior authorization has been added to a patient's record, you can view and edit the authorization details. You can also add additional days or visits to an existing prior authorization to a specific case. Within the **Prior Authorizations** page, each individual authorization is displayed in a separate section. Figure 5-33 shows an example of an individual prior authorization record.

Type	INPATIENT	Prior-Auth Number	6548976	Days Authorized	35	View Detail										
Insurer	ALLSTATE	Date Authorized	10/12/2011	Admission/Visit Date	10/12/2011											
Status	APPROVED	Encounter Notes: This is a sample encounter note.														
<table border="1"> <thead> <tr> <th>Contact Date</th> <th>Contact Person</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>10/12/2011</td> <td></td> <td>This is a sample contact note.</td> </tr> <tr> <td>10/25/2011</td> <td></td> <td>This is another sample contact note.</td> </tr> </tbody> </table>							Contact Date	Contact Person	Notes	10/12/2011		This is a sample contact note.	10/25/2011		This is another sample contact note.	
Contact Date	Contact Person	Notes														
10/12/2011		This is a sample contact note.														
10/25/2011		This is another sample contact note.														
<table border="1"> <thead> <tr> <th>Obtained On</th> <th>Contact</th> <th>Reference No.</th> <th>Days</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>10/14/2011</td> <td>JONES,DOW</td> <td>54879</td> <td>14</td> <td>This is a sample note for additio</td> </tr> </tbody> </table>							Obtained On	Contact	Reference No.	Days	Notes	10/14/2011	JONES,DOW	54879	14	This is a sample note for additio
Obtained On	Contact	Reference No.	Days	Notes												
10/14/2011	JONES,DOW	54879	14	This is a sample note for additio												

Figure 5-33: Individual prior authorization record example

Click **View Detail** to open the authorization record. A page similar to that shown in Figure 5-34 displays.

Prior Authorization

Patient <small>[required]</small>	Authorization Type <small>[required]</small>	Admission/Visit Date <small>[required]</small>										
DOE,JOHN	INPATIENT	10/12/2011										
Insurer <small>[required]</small>	Authorization Number <small>[required]</small>	Authorization Status <small>[required]</small>										
ALLSTATE	6548976	APPROVED										
Authorization Date	Authorized Days											
10/12/2011	35											
Encounter Notes												
This is a sample encounter note.												
Add Contact												
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Date</th> <th>Contact Person</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>10/12/2011</td> <td></td> <td>This is a sample contact note.</td> </tr> <tr> <td>10/25/2011</td> <td></td> <td>This is another sample contact note.</td> </tr> </tbody> </table>			Contact Date	Contact Person	Notes	10/12/2011		This is a sample contact note.	10/25/2011		This is another sample contact note.	
Contact Date	Contact Person	Notes										
10/12/2011		This is a sample contact note.										
10/25/2011		This is another sample contact note.										
Add Additional Days/Visits												
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Obtained On</th> <th>Contact</th> <th>Reference No.</th> <th>Days</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>10/14/2011</td> <td>JONES,DOW</td> <td>54879</td> <td>14</td> <td>This is a sample note for additional days/vi</td> </tr> </tbody> </table>			Obtained On	Contact	Reference No.	Days	Notes	10/14/2011	JONES,DOW	54879	14	This is a sample note for additional days/vi
Obtained On	Contact	Reference No.	Days	Notes								
10/14/2011	JONES,DOW	54879	14	This is a sample note for additional days/vi								
<input type="button" value="Save"/> <input type="button" value="Cancel"/>												

Figure 5-34: Individual **Prior Authorization** details example

Once open, you can view or edit any of these fields:

- Authorization Status
- Authorization Date
- Authorized Days/Visits
- Service Category
- Encounter Notes

After making any needed changes, click **Save** to save your changes and return to the main **Prior Authorizations** page, or click **Cancel** to return to the page without saving your changes. If you need to add a new contact or additional days or visits to the prior authorization, follow the steps in Sections 5.5.1.1 and 5.5.2.2 before clicking **Save**.

5.5.2.1 Adding a Contact

Click **Add Contact** on the **Prior Authorization** details page to add a new authorizing contact. Once open, you can add a new contact using the fields described in Section 5.5.1.1.

After entering the new authorizing contact information, click **OK** to save your changes and return to the **Prior Authorization** details page, or click **Cancel** to return to the **Prior Authorization** details page without saving your changes.

5.5.2.2 Adding Additional Days or Visits

Click **Add Additional Days/Visits** on the **Prior Authorization** details page to add additional days or visits to an existing prior authorization. These fields are provided:

- Date Obtained
- Contact Person
- Reference Number
- Days (or Visits)
- Notes

After adding more days or visits, click **OK** to save your changes and return to the **Prior Authorization** details page, or click **Cancel** to return to the **Prior Authorization** details page without saving your changes.

6.0 Record Flag Tab

The **Record Flag** tab (Figure 6-1) shows a comprehensive listing of patient record flags for the selected patient. It can be used to display a list of Category I and II flags and the details for those flags.



Figure 6-1: **Record Flags** tab

An example of the **Record Flags** tab page is shown in Figure 6-2.

 A screenshot of the 'Record Flags' tab page. At the top, there are tabs for 'Profile', 'Benefits', 'Appointments', and 'Record Flags'. To the right, there are indicators for 'Errors 1' and 'Warnings 4', and a 'Print' button. Below the tabs, there is a 'Category' dropdown menu set to 'All' and a 'Sort By' dropdown menu set to 'Flag'. An 'Add Assignment' button is also present. The main content is a table with the following data:

Category	Number	Flag	Originating Site	Owner Site	Review Date	Active	Assignment Narrative
CATEGORY I (NATIONAL FLAG)	259	BEHAVIORAL	2013 DEMO HOSPITAL	2013 DEMO HOSPITAL	3/20/2015	<input checked="" type="checkbox"/>	BEHAVIORAL RECORD FLAG
CATEGORY II (LOCAL FLAG)	258	FOLLOW UP NEEDED	2013 DEMO HOSPITAL	2013 DEMO HOSPITAL	3/20/2015	<input checked="" type="checkbox"/>	FOLLOW UP ON PATIENT'S NEXT VISIT

 At the bottom right of the page, it says 'Page 1'.

Figure 6-2: **Record Flag** tab page example

6.1 Category Filter

Use the **Category** filter list (Figure 6-3) to sort by All, Category I (National Flag), or Category II (Local Flag).

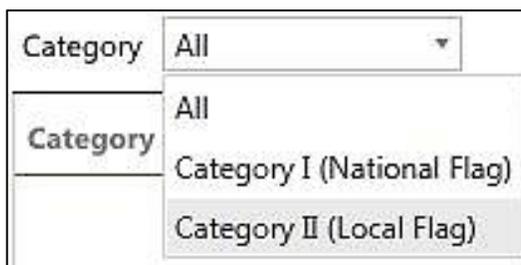
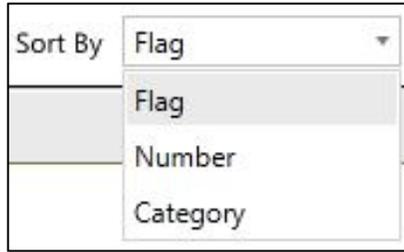


Figure 6-3: **Sort By** filter list box

6.1.1 Sort By Filter

Use the **Sort By** filter list (Figure 6-4) to sort by **Flag**, **Number**, or **Category**.

Figure 6-4: **Sort By** filter list box

6.1.2 Record Flag Information Listed

The following information is listed for each record flag (when applicable):

- Category
- Number
- Flag
- Originating Site
- Owner Site
- Review Date
- Active
- Assignment Narrative

6.2 Adding an Assignment

Click **Add Assignment** to add a new record flag assignment to the selected patient's record. This displays a page similar to that shown in Figure 6-5.

Figure 6-5: **Add Assignment** page example

The **Add Assignment** page contains the fields shown in Table 6-1.

Table 6-1: **Add Assignment** fields

Field	Description
Category I (National Flag)	Use to specify type of flag to assign: Category I (National Flag) or Category II (Local Flag)
Flag Name	Choose from list: Dependent on type of flag assigned: Category I (National Flag) or Category II (Local Flag)
Review Date	Date flag will be up for review
Approved By	Search Box: Use this field to search for the user to who approved the record flag.
Assignment Narrative	Use this free-text field to enter an explanation for this particular record flag.
Active (check box)	Status of flag (Active or Inactive)

When done, click **Save** to save the Record Flag Assignment and add it to the patient's record, or click **Cancel** to exit from the **Add Assignment** page without saving your changes.

6.3 Record Flag Display

The **Record Flag** icon (Figure 6-6) shows an active flag on a patient's records. It can be used to display a list of Category I and II flags and the details for those flags.

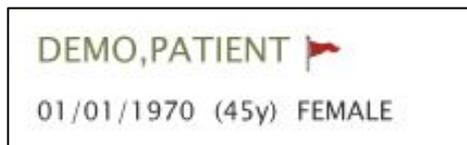


Figure 6-6: **Record Flags** tab

6.3.1 Record Flag in Patient Information Banner

Use the mouse to hover over the record flag icon next to the patient's name to view the active flag(s) on the patient record. A page similar to that shown in Figure 6-7 displays.

DEMO, PATIENT SSN
01/01/1970 (45y) FE

Flag	Site	Review Date
FOLLOW UP NEEDED	2013 DEMO HOSPITAL	3/20/2015
FOLLOW UP ON PATIENT'S NEXT VISIT		
BEHAVIORAL	2013 DEMO HOSPITAL	3/20/2015
BEHAVIORAL RECORD FLAG		

Record Flag

Category I (National Flag)

Assignment Narrative

Figure 6-7: Record Flag information in Patient

7.0 Benefits Module

The BPRM Benefits module provides a list-style overview of all benefits cases for a site. In cases where a site includes multiple divisions, this overview covers all of the divisions within the site.

When using the Benefits module, you have the option of viewing all the benefits cases for the site or only those cases assigned to you. You can also filter the list of benefits cases by status and sort the list in several ways.

Click **Benefits** in the BPRM taskbar to open the Benefits module. Figure 7-1 shows an example of a typical **Benefits** module page.

The screenshot displays the Benefits module interface. At the top, there is a navigation bar with 'Register Patient', a search bar, 'Advanced Search', and '2013 DEMO HOSPITAL'. Below this, there are filters for 'Status' (set to 'All') and 'My Cases', along with a 'Sort By' dropdown (set to 'Status') and an 'Add Case' button. The main content area lists three cases:

- DEMO,PATRICK**: Case No. [blank], Date Assigned 3/18/2013, Reason AHCCCS. Applications table:

Obtained On	Application Type	Person Receiving	Overall Status
03/18/2013	AHCCCS	.	PENDING
- DEMO,BETTY LOU**: Case No. [blank], Date Assigned 3/18/2013, Reason AHCCCS. Applications table:

Obtained On	Application Type	Person Receiving	Overall Status
03/18/2013	AHCCCS	.	PENDING
- DEMO,DIANE**: Case No. [blank], Date Assigned 6/23/2010, Reason NO ALT RES. Applications table:

Obtained On	Application Type	Person Receiving	Overall Status
[blank]	[blank]	[blank]	[blank]

Each case entry includes a 'View Case Detail' button and an 'Add Application' button. The bottom of the page shows navigation arrows and 'Page 1'.

Figure 7-1: **Benefits** module page example

Each page displayed within the Benefits module contains a list of benefits cases (one entry per case number), with a listing of benefit applications associated with each individual benefits case. Use the scroll bar on the right of the page to view the complete page and use the right and left arrows at the lower left of the page to navigate from one page to another.

7.1 Managing Benefits Cases

The actions available from within the Benefits module are largely duplicates of the tasks that can be done from the **Benefits** tab in the Patients module. The key difference is that the Benefits module shows multiple patients at once, whereas the **Benefits** tab in the Patients module shows only one patient at a time.

7.1.1 Filtering Benefits Cases

By default, the Benefits module shows all the benefits cases for your site. You can filter this view in various ways to make finding a specific case easier.

Use the **Status** filter list in the upper left of the Benefits module page to show only Open, Closed, or All benefits cases.

You can also choose to only show the benefits cases that have been assigned to you. Click **My Cases** in the upper left of the Benefits module page to alternately toggle between showing only your cases and showing all cases. In either view, the Status filter will also be in effect. For example, by using the **Status** filter and the **My Cases** option, you can filter the list of benefits cases to show only your closed cases.

7.1.2 Sorting Benefits Cases

Use the **Sort By** list box in the upper right of the Benefits module page to sort the list of benefits cases by Date Assigned, Status, or the Patient Name.

7.1.3 Adding a Benefits Case

Click **Add Case** in the upper right of the Benefits module page to add a new benefits case. A new page is displayed with the same forms and fields as shown when adding a benefits case from within the **Benefits** tab of the **Patients** module. See Section 5.4.1 for complete information about adding a benefits case.

7.1.4 Viewing Case Details

Click **View Case Details** on the right side of an individual benefits case listing to see a detailed view of that case. This will display the case details in the same manner as viewing case details from the **Benefits** tab of the **Patients** module. See Section 5.4.2 for complete information about the detailed case view.

7.1.5 Adding a Benefits Application

Click **Add Application** on the right side of an individual benefits case listing to add a new benefits application to that case. This will open the case details page in the same manner as adding an application from within the **Benefits** tab of the **Patients** module. See 5.4.1.1 for complete information about adding a benefits case application.

8.0 Prior Authorizations Module

The BPRM Prior Authorizations module provides a list-style overview of all prior authorizations for a site. In cases where a site includes multiple divisions, this overview covers all the divisions within the site.

When using the Prior Authorizations module, you have the option to filter the list of prior authorizations by type and status and to sort the list in several ways.

Click **Prior Auths** in the BPRM taskbar to open the **Prior Authorizations** module. Figure 8-1 shows an example of a typical **Prior Authorizations** module page.

The screenshot displays the Prior Authorizations module interface. At the top, there is a navigation bar with 'Register Patient', a search field, 'Advanced Search', and '2013 DEMO HOSPITAL'. Below this, there are filters for 'Type' (All) and 'Status' (All), a 'Sort By' dropdown (Encounter Date), and an 'Add Prior Authorization' button. The main content area lists three authorization entries, each with a 'View Detail' button.

DEMOGRAPHICS,GUMBALL WALTER			View Detail
Type	OUTPATIENT	Number 4645646	Visits Authorized
Insurer	NEW MEXICO MEDICAID		Date Authorized
Status	PENDING	Service Category	Encounter Date 09/28/2014
Encounter Notes			
Authorizing Contacts	No Authorization Contacts		
Additional Visits	No Additional Visits		

DEMOGRAPHICS,PATIENT THREE			View Detail						
Type	OUTPATIENT	Number 45633	Visits Authorized						
Insurer	NEW MEXICO MEDICAID		Date Authorized						
Status	PENDING	Service Category	Encounter Date 09/22/2014						
Encounter Notes									
Authorizing Contacts	<table border="1"> <thead> <tr> <th>Contact Date</th> <th>Contact Person</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>09/22/2014</td> <td>PERSON PERSON</td> <td></td> </tr> </tbody> </table>			Contact Date	Contact Person	Notes	09/22/2014	PERSON PERSON	
Contact Date	Contact Person	Notes							
09/22/2014	PERSON PERSON								
Additional Visits	No Additional Visits								

RCIS,BENJAMIN			View Detail
Type	OUTPATIENT	Number	Visits Authorized
Insurer			Date Authorized

At the bottom left, there are navigation arrows, and at the bottom right, it says 'Page 1'.

Figure 8-1: **Prior Authorizations** module page example

Each page displayed within the Prior Authorizations module contains a list of prior authorizations (one entry per authorization number), with listings of authorizing contacts and additional visits for each authorization. Use the scroll bar on the right of the page to view the complete page and use the right and left arrows at the lower left of the page to navigate from one page to another.

8.1 Managing Prior Authorizations

The actions available from within the Prior Authorizations module are largely duplicates of the tasks that can be done from the **Prior Authorizations** page within the **Benefits** tab in the Patients module. The key difference is that the Prior Authorizations module shows multiple patients at once, whereas the **Prior Authorizations** page in the Patients module shows only one patient at a time.

8.1.1 Filtering Prior Authorizations

By default, the Prior Authorizations module shows all the prior authorizations for your site. You can filter this view in various ways to make finding a specific authorization easier.

Use the **Type** list box to display the patient's prior authorizations by type. You can choose to show Inpatient, Outpatient, or All prior authorization types.

Use the **Status** list box to display the patient's prior authorizations sorted by status. Select one status from among these choices:

- **All**
- **Approved**
- **Authorization Not Needed**
- **Denied**
- **Entered In Error**
- **Follow Up Needed**
- **Pending**
- **Refused**
- **Re-Submitted**

The Type and Status filters work together. For example, by using the Type filter and the Status filter, you can filter the list of prior authorizations to show only inpatient authorizations that have been denied.

8.1.2 Sorting Benefits Cases

Use the **Sort By** list box in the upper right of the **Prior Authorizations** module page to display the list of prior authorizations grouped by one of these criteria:

- **Encounter Date**
- **Status**
- **Type**

8.1.3 Adding a Prior Authorization

Click **Add Prior Authorization** in the upper right of the Prior Authorizations module page to add a new prior authorization. When you do this, a new page displays with the same forms and fields as shown when adding a prior authorization from within the **Benefits** tab of the **Patients** module. See Section 5.5.1 for complete information about adding a new prior authorization.

8.1.4 Viewing Prior Authorization Details

Click **View Detail** on the right side of an individual prior authorization listing to see a detailed view of that authorization. This displays the authorization details in the same manner as viewing them from the **Benefits** tab of the **Patients** module. See Section 5.5.2 for complete information about viewing and editing prior authorizations.

9.0 Patient Registration Configuration

Unlike the other modules in the Practice Management Application Suite (BPRM), the Settings module does not directly control or modify patient records. Instead, it controls a variety of application settings for other modules by allowing you to change or add such things as available appointment types, employer names, insurers, and clinics. Changes made within the Settings module are typically done by a Supervisor or Site Manager. In most cases, once these settings have been established, they will rarely need to be changed.

Note: The options available in the Settings module may vary for different users, depending on the RPMS functionality enabled at your site and the access permissions granted to each user.

Users must log off and log back in to the BPRM application for any patient registration configuration changes they have made to take effect.

To open the Settings module, click **Settings** in the Taskbar, as shown in Figure 9-1.



Figure 9-1: Taskbar with **Settings** module highlighted

The selection pane on the left side of the **Settings** module displays a list of available options. The information displayed on the right side of the screen varies, depending on the option chosen. The settings that affect the Patient Registration module are found on the **Table Maintenance** page of the Settings module.

Click **Table Maintenance** in the selection pane of the Settings Module to see the main **Table Maintenance** page. Figure 9-2 shows an example of the Settings module with the **Table Maintenance** page displayed.



Figure 9-2: Settings Module – **Table Maintenance** page

9.1 Category II (Local Flag)

To use this option, click **View** next to the **Category II (Local Flag)** label on the **Table Maintenance** page. The Category II (Local Flag) listing page similar to that shown in Figure 9-5 displays.

Category II (Local Flag) Add Edit					
Sort By <input type="text" value="Name"/>					
Name	Status	Type	Review Frequency Days	Notification Days	Description
FOLLOW UP NEEDED	Active	CLINICAL	0	0	Follow up of this patient was requested by provider. Please see note.
INFECTIOUS DISEASE	Active	CLINICAL	365	325	This patient has been diagnosed with an infectious disease.,The note will include details.
LAB NEEDED	Active	CLINICAL	120	110	Patient needs 1 hour 50 gram glucose test ASAP to meet standards of care.
PAIN ASSESSMENT	Inactive	CLINICAL	0	0	"May be used as a reminder after pain relief measures provided. May also ",be used as a rei

Page 1

Close

Figure 9-3: **Eligibility Modifiers** listing page

9.1.1 Sorting the Category II (Local Flag) Listing

Use the **Sort By** list box to sort the listing by **Name**.

9.1.2 Adding Category II (Local Flag)

Follow these steps to add a new Category II (Local Flag) to the RPMS database:

1. Click **Add** on the **Category II (Local Flag)** listing page. The blank **Category II (Local Flag)** form shown in Figure 9-6 displays.

The screenshot shows a web form titled "Category II (Local Flag)". The form is organized into several sections. At the top, there are four input fields: "Name" (a text box), "Type" (a dropdown menu), "Review Frequency Days" (a text box containing the number "0"), and "Notification Days" (a text box containing the number "0"). Below these fields is a "Description" text area and an "Active" checkbox, which is currently checked. At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Figure 9-4: Blank **Category II (Local Flag)** form

2. Type the name for the new Category II (Local Flag) in the **Name** field.
3. Select a local flag type from the **Type** list box. These choices are available:
 - Behavioral
 - Clinical
 - Other
 - Research
4. Enter the number of days that may elapse between reviews of the local flag assignment in the **Review Frequency Days** field. A value of zero (0) indicates that no automatic review will occur.
5. Enter the number of days prior to this flag assignment's review date that a notification is sent to the review group in the **Notification Days** field. A value of zero (0) indicates that no automatic review will occur.
6. Enter a brief description of this patient record flag in the **Description** field.
7. Select the **Active** option if applicable. Unchecking this box will indicate an Inactive local flag.
8. When done, click **Save** to save the new local flag, or click **Cancel** to close the form without saving the new local flag.

9.1.3 Editing Category II (Local Flag)

Follow these steps to edit the Category II (Local Flag) that was locally added to the RPMS database:

1. Select the local flag to be edited in the **Category II (Local Flag)** listing page to filter the list, then click **Edit** in the upper right corner of the page to edit the selected local flag. (Alternatively, you can double-click the name of the local flag.)
2. After making any changes necessary, click **Save** to save your changes and close the **Category II (Local Flag)** form, or click **Cancel** to close the form without saving your changes.

9.2 Eligibility Modifier Settings

Use the **Eligibility Modifiers** option on the **Table Maintenance** page to add eligibility modifiers to the RPMS database or edit certain existing ones. Once established, eligibility modifiers are available as options in the **Eligibility Status** and **Eligibility Reasons** fields within the **Personal Detail** section of the **Demographics** page, as described in Section 4.1.1 of this manual.

To use this option, click **View** next to the **Eligibility Modifiers** label on the **Table Maintenance** page. An **Eligibility Modifiers** listing page similar to that shown in Figure 9-5 displays.

Name	Type
BAPTISMAL RECORD	NL
CERTIFICATE OF DEGREE OF INDIAN BLOOD	D
COMMISSION CORP OFFICER	D
CONSENT FOR MEDICAL CARE OF A MINOR	L
COURT ORDER	L
COURT ORDER	N
DEPENDENT OF COMMISSION CORP OFFICER	D
DESCENDANT FROM FED. RECOGNIZED TRIBE	ICDP
DESCENDANT FROM FEDERALLY RECOGNIZED TRIBE	D
DESCENDANT FROM FEDERALLY RECOGNIZED TRIBE	C
DISSOLUTION DECREE	NL
DIVORCE DECREE	NL
DOUBTFUL CASES (LIMITED ACCESS)	D
ELIGIBLE FOSTER CHILD OUT OF CHSDA	C
ELIGIBLE STUDENT OR TRANSIENT OUT OF CHSDA	C
ENROLLED MEMBER OF OTHER TRIBE NOT LIVING ON LOCAL RESERVATION	D
ENROLLED MEMBER OF OTHER TRIBE LIVING ON LOCAL RESERVATION	C

Figure 9-5: **Eligibility Modifiers** listing page

9.2.1 Filtering and Sorting the Eligibility Modifiers Listing

There are several ways to filter or sort the listing of eligibility modifiers:

- Use the **Type** list box to filter the listing of modifiers by type.
- Use the **Sort By** list box to sort the listing by either **Type** or **Name**.
- Type the first few letters of an eligibility modifier in the **Filter Eligibility Modifiers** box in the upper right corner of the **Eligibility Modifiers** listing page to filter the list, and then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find a specific modifier.

9.2.2 Adding Eligibility Modifiers

Follow these steps to add a new eligibility modifier to the RPMS database:

1. Click **Add** on the **Eligibility Modifiers** listing page. The blank **Eligibility Modifiers** form shown in Figure 9-6 displays.



The screenshot shows a web form titled "Eligibility Modifiers". It contains two input fields at the top: "Modifier Description" and "Type". Both fields are marked as "[required]". The "Type" field is a dropdown menu. Below the input fields is a large empty text area. At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Figure 9-6: Blank **Eligibility Modifiers** form

2. Type a description for the eligibility modifier in the **Modifier Description** field.
3. Select a modifier type from the **Type** list box. These choices are available:
 - I – Ineligible
 - C – CHS and direct
 - D – Direct Only
 - P – Pending verification
 - L – Legal docs
 - N – Name change
 - NL – Combination of options N and L above

- ICDP – Combination of options I, C, D, and P above
4. When done, click **Save** to save the new eligibility modifier, or click **Cancel** to close the form without saving the new modifier.

9.2.3 Editing Eligibility Modifiers

Follow these steps to edit an eligibility modifier that was locally added to the RPMS database:

1. Type the first few letters of an eligibility modifier in the **Filter Eligibility Modifiers** box in the upper right corner of the **Eligibility Modifiers** listing page to filter the list, and then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find a specific modifier.
2. Select the eligibility modifier to be edited, and then click **Edit** in the upper right corner of the page to edit the selected eligibility modifier. (Alternatively, you can double-click the name of the eligibility modifier.)
3. After making any changes necessary, click **Save** to save your changes and close the Eligibility Modifiers form, or click **Cancel** to close the form without saving your changes.

9.3 Employer Group Insurance Settings

Use the **Employer Group Insurance** option on the **Table Maintenance** page to add employer group insurance to the RPMS database or edit information about existing group insurance. To use this option, click **View** next to the **Employer Group Insurance** label on the **Table Maintenance** page. An **Employer Group Insurance** listing page similar to that shown in Figure 9-7 displays.

Employer Group Insurance	
<input type="button" value="Add"/> <input type="button" value="Edit"/>	
Sort By <input type="text" value="Group Name"/> Filter Group Insurance <input type="text"/>	
Group Name	Group Number
AETNA LIFE INSURANCE CO.	657324-08-0926
ALLEGIANCE LIFE INS.	192385
AMERIBEN-AZ HLTH INS POOL	AM2E
AMERICAN NATIONAL INS	HX565707
AZ HEALTH INS	0107003
AZ HEALTH INS POOL	AHPOO1
DALRC RETIREE INSURANCE	309/090014896
EMPLOYERS HEALTH INSURANCE	UNKNOWN
HUMANA INS CO	P5385003
HUMANA INS COMPANY	P5374010
HUMANA INSURANCE	P5374018
HUMANA INSURANCE COMPANY	P5374021
HUMANA INSURANCE COMPANY.	R0957002
INSURER'S ADMINISTRATIVE CORP.	PKCH0501000
MAINSTREAM UNIVERSAL	0005900
OTHER INSURANCE	
THE TRAVELERS INSURANCE CO	

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Figure 9-7: Employer Group Insurance listing page

9.3.1 Filtering and Sorting the Employer Group Insurance Listing

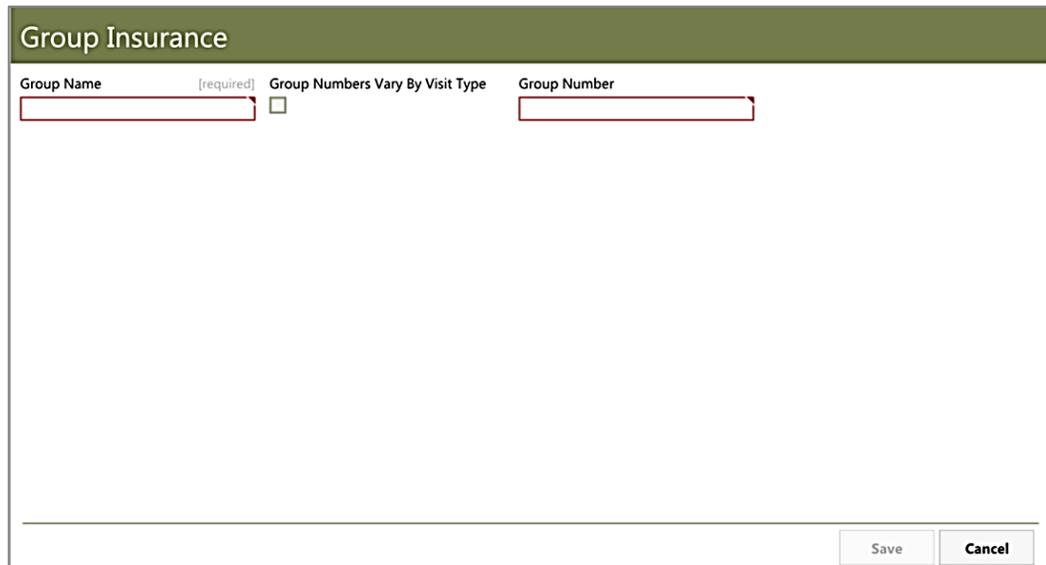
There are two ways to filter or sort the listing of employer group insurance:

- Use the **Sort By** list box to sort the listing by either **Group Name** or **Number**.
- Type the first few letters of a group insurance name in the **Filter Group Insurance** box in the upper right corner of the **Employer Group Insurance** listing page to filter the list, then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find a specific group insurance.

9.3.2 Adding Group Insurance

Follow these steps to add a new employer group insurance to the RPMS database:

1. Click **Add** on the **Group Insurance** listing page to create a new Group Insurance. The **Group Insurance** form shown in Figure 9-8 displays.



The image shows a web form titled "Group Insurance" with a dark green header. Below the header, there are three input fields: "Group Name" with a "[required]" label, "Group Numbers Vary By Visit Type" with a checkbox, and "Group Number". At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Figure 9-8: Blank **Group Insurance** form

2. Type the group name in the **Group Name** field.
3. Select the **Group Numbers Vary By Visit Type** option if applicable.
4. Enter the group number in the **Group Number** field, if applicable.
5. Click **Save** to save the new group insurance to the database.

9.3.3 Editing Group Insurance

Follow these steps to edit an existing group insurance entry in the RPMS database:

1. Type the first few letters of the group insurance name in the **Filter Group Insurance** box in the upper right corner of the **Group Insurance** listing page to filter the list, and then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find the group insurance to be edited. Figure 9-9 shows an example of using *al* as the filter term to find ALCOA.

Group Insurance	
<input type="button" value="Add"/> <input type="button" value="Edit"/>	
Sort By Group Name Filter Group Insurance <input type="text" value="al"/>	
Group Name	Group Number
ALAMEDA CONTRA COSTA TRANSIT	663215
ALAMEDA--CONTRA COSTA TRANSIT	UHEALTH
ALAMEDA-CONTRA COSTA TRANSIT	0663215
ALCO	87726
ALCOA	
ALEGENT HEALTH	LUM001
ALLEGHENY ENERGY	43924-01
ALLEN FREIGHT	370007
ALLEN WARD CONSTRUCTORS	379619
ALLIANCE	B12A 3288993
ALLIANCE-	00003000
ALLISONS	NCA207-1094
Page 1	
<input type="button" value="Close"/>	

Figure 9-9: Filtered Group Insurance listing

2. Select the group insurance to be edited, and then click **Edit** in the upper right corner of the page to edit the selected group insurance. (Alternatively, you can double-click the name of the group insurance.) Figure 9-10 shows an example of the **Group Insurance** form ready to be edited.

Group Insurance	
Group Name <small>[required]</small>	Group Numbers Vary By Visit Type
<input type="text" value="ALCOA"/>	<input type="checkbox"/>
	<input type="text" value=""/>
Visit Types	
<input type="button" value="Add"/> <input type="button" value="Edit"/>	
Name	Group Number(Visit Specific)
INPATIENT	214598
PHARMACY	354897
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 9-10: Group Insurance form open for editing

- Once the form is open for editing, you can change the **Group Name**, **Group Numbers Vary By Visit Type**, and **Group Number** fields as necessary. (The **Visit Type** options are described in Sections 9.3.3.1 and 9.3.3.2) After making any changes necessary, click **Save** to save your changes and close the **Group Insurance** form, or click **Cancel** to close the form without saving your changes.

9.3.3.1 Adding Visit Types

When editing a group insurance entry, you are given the option of adding or editing the **Visit Type**. To add a visit type, follow these steps:

- After opening the group insurance for editing as described in Section 9.3.3, click **Add** in the **Visit Types** section of the page. A blank **Visit Type** edit pane is displayed as shown in Figure 9-11.

The screenshot shows a window titled "Group Insurance" with a dark green header. Below the header, there are two input fields: "Group Name" (with a "[required]" label) containing the text "ALCOA", and "Group Numbers Vary By Visit Type" with a checked checkbox. Below these is a "Visit Type" edit pane. This pane contains a dropdown menu for "Visit Type" and a text input field for "Group Number(Visit Specific)". At the bottom right of this pane are "OK" and "Cancel" buttons. At the bottom right of the main window are "Save" and "Cancel" buttons.

Figure 9-11: Blank **Visit Type** edit pane

- Select the appropriate visit type from the **Visit Type** list box.
- If the **Group Numbers Vary By Visit Type** option is enabled, the **Group Number (Visit Specific)** field is also displayed. If it displays, enter the group number for that particular visit type.
- After adding the appropriate information, click **OK** to save the new visit type, or click **Cancel** to close the **Visit Type** edit pane without saving your changes.

9.3.3.2 Editing Visit Types

Follow these steps to edit an existing visit type:

- After opening the group insurance to be edited as described in Section 9.3.3, select the visit type to be edited in the **Visit Types** section of the page, and then click **Edit**. The **Visit Type** edit pane displays as shown in Figure 9-12.

Group Insurance

Group Name [required] ALCOA Group Numbers Vary By Visit Type

Visit Type PHARMACY Group Number(Visit Specific) 354897

OK Cancel

Save Cancel

Figure 9-12: **Visit Type** edit pane

2. Make any changes to the **Visit Type** field, and if applicable, the **Group Number (Visit Specific)** options.
3. Click **OK** to save the edited visit type or click **Cancel** to close the **Visit Type** edit pane without saving your changes.

9.4 Employer Settings

Use the **Employers** option on the **Table Maintenance** page to add employers to the RPMS database or edit information about existing employers. To use this option, select **Employers** on the **Table Maintenance** page and click **View** at the upper right corner of the page. An **Employers** listing page similar to that shown in Figure 9-13 displays.

Employers							Add	Edit
							Filter Employers <input type="text"/>	
Name	Phone	Abbrev.	Street Address	City	State	Zip		
A & S BLD SYSTEMS	800-274-2100		PO BOX 53	CARYVILLE	TENNESSEE	37714		
A & S CLOTHING	706-632-2133		ADA ST BLUE RIDGE IND PK	BLUE RIDGE	GEORGIA	30513		
A BRICKY COMPANY	828-665-7124		108 OLD CANDLER TOWN RD	CANDLER	NORTH CAROLINA	28715		
A BRITTANY COMPANY	972-492-0619		2125 COURTLAND CIR	CARROLTON	TEXAS	75007		
A CHILDS WORLD DAY CARE	912-529-3067		1430 CALHOUN STREET	SOPERTON	GEORGIA	31002		
A PLUS SERVICES								
A&A CONSTRUCTION	509-927-8613		PO BOX 141701	SPOKANE VLY	WASHINGTON	99214		
A&B CONSTRUCTION	828-258-2000		PO BOX 15370	ASHEVILLE	NORTH CAROLINA	28813		
A&B EMBLEM	800-434-4285		PO BOX 695	WEAVERVILLE	NORTH CAROLINA	28787		
A&E	828-754-9066		619 CONNELLY SPRING	LENOIR	NORTH CAROLINA	28645		
A&E MILLS	828-754-9066		619 CONNELLY SPGS RD SW	LENOIR	NORTH CAROLINA	28645		

Page 2

Close

Figure 9-13: **Employers** listing page

9.4.1 Adding an Employer

Follow these steps to add an employer to the RPMS database:

1. Click **Add** on the **Employer** listing page. The blank **Employer** form shown in Figure 9-14 displays.

Employer		
Name <small>[required]</small>	Abbreviation	Phone
<input type="text"/>	<input type="text"/>	<input type="text"/>
Street Address		
<input type="text"/>		
Street Address Line 2		
<input type="text"/>		
City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Figure 9-14: Blank **Employer** form

- Fill in the fields of the form as is appropriate, and then click **Save** to save your entries and close the form or click **Cancel** to close the form without saving your entries.

If the employer name entered is a duplicate of an existing employer, a warning message displays, and the form cannot be saved until a non-duplicate employer name is entered.

9.4.2 Editing an Employer

Follow these steps to edit an existing employer in the RPMS database:

- Type the first few letters of the employer's name in the **Filter Employers** box in the upper right corner of the **Employer** listing page to filter the list, and then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find the employer to be edited. Figure 9-15 shows an example of using *brian* as the filter term to find Brian's Car Wash.

Employer								Add	Edit
							Filter Employers	brian	
Name	Phone	Abbrev.	Street Address	City	State	Zip			
BRIAN CENTER									
BRIAN KEVAS	704-837-0300		110 SOLE STREET						
BRIAN LOWE									
BRIAN'S CAR WASH	555-357-1597	BCW	6543 MAIN STREET	GENERICVILLE	ARKANSAS	41578			
BRIANS CENTER				WAYNESVILLE	NORTH CAROLINA				
KEVIN O'BRIAN,MD									
O'BRIAN,JOHN				TALLASSEE	TENNESSEE				
OBRIANS			MAIN ST.	CHEROKEE	NORTH CAROLINA	28719			
WAYNESVILLE BRIANS CENT				WAYNESVILLE					

Page 1

Close

Figure 9-15: Filtered **Employer** listing

- Select the employer to be edited, and then click **Edit** in the upper right corner of the page to edit the selected employer. (Alternatively, you can double-click the name of the employer.) Figure 9-16 shows an example of the **Employer** form ready to be edited.

Name	Abbreviation	Phone
BRIAN'S CAR WASH	BCW	555-357-1597

Street Address
6543 MAIN STREET

Street Address Line 2

City	State	Zip Code
GENERICVILLE	ARKANSAS	41578

Save Cancel

Figure 9-16: **Employer** form open for editing

3. After making any changes necessary, click **Save** to save your changes and close the **Employer** form, or click **Cancel** to close the form without saving your changes.

9.5 Insurer Settings

Use the **Insurers** option on the **Table Maintenance** page to add insurers and guarantors to the RPMS database or edit information about existing ones. To use this option, select **Insurers** on the **Table Maintenance** page and click **View** at the upper right corner of the page. An **Insurer** listing similar to that shown in Figure 9-17 is provided.

Additional Insurer Types have been added in Patch 7. The list defines the eligibility of 21 various insurer types. The new insurer types fall under Private Insurance. This field can only to be used by Site Managers. Figure 9-17 shows a listing of Insurer Types.

•	3P LIABILITY	T		
•	CHAMPUS	C		
•	CHIP (KIDSCARE)	K		
•	FPL 133 PERCENT	FPL		←NEW
•	FRATERNAL ORG	F		
•	GUARANTOR	G		
•	HMO	H		
•	INDIAN PATIENT	I		
•	MCR MANAGED CARE	MMC		←NEW
•	MCR PART C	MC		←NEW
•	MCR PART D	MD		
•	MEDICAID FI	D		
•	MEDICARE FI	R		
•	MEDICARE HMO	MH		
•	MEDICARE SUPPL	M		
•	NON-BEN (NON-INDIAN)	N		
•	PRIVATE	P		
•	STATE EXCHANGE PLAN	SEP		←NEW
•	TRIBAL SELF INSURED	TSI		←NEW
•	VETERANS ADMINISTRATION	V		←NEW
•	WORKMEN'S COMP	W		

Figure 9-17: Insurers listing

9.5.1 Adding an Insurer

Follow these steps to add an insurer to the RPMS database:

1. Click **Add** on the **Insurer** listing page. The blank **Insurer** form shown in Figure 9-18 displays.

Insurer

<input type="text" value="Name"/> <small>[required]</small>	<input type="text" value="Long Name"/>	<input type="text" value="Phone"/>	<input type="text" value="Contact Person"/>
<input type="text" value="Status"/> <small>[required]</small>	<input type="text" value="Screen Display"/>	<input type="text" value="Type"/> <small>[required]</small>	<input type="text" value="Rx Status"/>
<input type="text" value="Street Address"/>			
<input type="text" value="City"/>	<input type="text" value="State"/>	<input type="text" value="Zip Code"/>	
<input type="text" value="Billing Office"/>		<input type="text" value="Billing Street Address"/>	
<input type="text" value="Billing City"/>	<input type="text" value="Billing State"/>	<input type="text" value="Billing Zip Code"/>	
<input type="text" value="Plan Name Required"/>	<input type="text" value="Medicaid Coverage Required"/>	<input type="text" value="Medicaid Rate Code Required"/>	<input type="text" value="Network Provider"/>

Figure 9-18: Blank Insurer form

- Fill in the fields of the form as is appropriate, and then click **Save** to save your entries and close the form or click **Cancel** to close the form without saving your entries.

If the insurer name entered is a duplicate of an existing insurer, a warning message displays, and the form cannot be saved until a non-duplicate Insurer name is entered.

9.5.2 Editing an Insurer

Follow these steps to edit an existing insurer or guarantor in the RPMS database:

- Type the first few letters of the employer's name in the **Filter Employers** box in the upper right corner of the **Insurers** listing page to filter the list, and then use the vertical scroll bar on the right side of the page and/or the left and right arrows in the lower left corner of the page to find the insurer to be edited. Figure 9-19 shows an example of using *delt* as the filter term to find Delta Dental.

Name	Street	City	State	Zip
DELTA DENT JACKSON COUNTY SCH	343 SIX FORKS ROAD	RALEIGH	NORTH CAROLINA	27609
DELTA DENTAL	P.O. BOX 1517	PROVIDENCE	RHODE ISLAND	02901
DELTA DENTAL - FEDERAL SERS	PO BOX 537007	SACRAMENTO	CALIFORNIA	95853-7007
DELTA DENTAL OF ARK	P.O.BOX 16450	N LITTLE ROCK	ARKANSAS	72231
DELTA DENTAL OF GA	P.O. BOX 1809	ALPHARETTA	GEORGIA	30023-1809
DELTA DENTAL OF MASS.	PO BOX 9695	BOSTON	MASSACHUSETTS	02114
DELTA DENTAL OF MASSACHUSETTS	P.O. BOX 9104	MEDFORD	MASSACHUSETTS	02155
DELTA DENTAL OF MISSOURI	P.O. BOX 16921	ST. LOUIS	MISSOURI	63105
DELTA DENTAL OF MISSOURI-USA	P.O. BOX 8690	ST. LOUIS	MISSOURI	63126
DELTA DENTAL OF NEW MEXICO INC	2101 SAN PEDRO NE # D	ALBUQUERQUE	NEW MEXICO	87110
DELTA DENTAL OF OKLAHOMA	PO BOX 548809	OKLAHOMA CITY	OKLAHOMA	73154
DELTA DENTAL OF RHODE ISLAND	444 WESTMINSTER MALL	PROVIDENCE	RHODE ISLAND	02901

Figure 9-19: Filtered **Insurer** listing

- Select the insurer to be edited, and then click **Edit** in the upper right corner of the page to edit the selected insurer. (Alternatively, you can double-click the name of the insurer.) Figure 9-20 shows an example of the **Insurer** form ready to be edited.

Insurer			
Name [required]	Long Name	Phone	Contact Person
DELTA DENTAL	DELTA DENTAL		
Status [required]	Screen Display	Type [required]	Rx Status
BILLABLE		PRIVATE	OUTPATIENT DRUGS ONLY
Street Address			
P.O. BOX 1517			
City	State	Zip Code	
PROVIDENCE	RHODE ISLAND	02901	
Billing Office		Billing Street Address	
DELTA DENTAL		PO BOX 1517	
Billing City	Billing State	Billing Zip Code	
PROVIDENCE	RHODE ISLAND	02901	
Plan Name Required	Medicaid Coverage Required	Medicaid Rate Code Required	Network Provider
NOT ENTERED	NOT ENTERED	NOT ENTERED	NOT ENTERED
			Save Cancel

Figure 9-20: **Insurer** form open for editing

- After making any changes necessary, click **Save** to save your changes and close the **Insurer** form, or click **Cancel** to close the form without saving your changes.

9.6 Patient Application Type Settings

Use the **Patient Application Types** option on the **Table Maintenance** page to add patient application types to the RPMS database or edit existing ones. Once established, patient application types are available as options in the **Application Type** field on the **Benefits Cases** page of the **Benefits** Tab as described in Section 5.4.1 of this manual.

To use this option, select **Patient Application Types** on the **Table Maintenance** page and click **View** at the upper right corner of the page. A **Patient Application Types** listing page similar to that shown in Figure 9-13 displays.

Patient Application Types	
	Add Edit
Name	
AAA APPLICATION TYPE	
AAA APPLICATION TYPE I	
AAA APPLICATION TYPE II	
DISABILITY	
HEALTH CHOICE	
MEDICAID	
MEDICARE	
MVA	
PRIVATE INSURANCE	
SCHOOL INSURANCE	
STATE MEDICAID DISABILITY	
WORKMAN'S COMP	
Close	

Figure 9-21: **Patient Application Types** listing page

9.6.1 Adding a Patient Application Type

Follow these steps to add a patient application type to the RPMS database:

1. Click **Add** on the **Patient Application Type** listing page. The blank **Patient Application Type** form shown in Figure 9-22 displays.

Patient Application Type	
Application Type	[required]
<input type="text"/>	
Save Cancel	

Figure 9-22: Blank **Patient Application Type** form

2. Type the name of the new patient application type in the field provided and click **Save** to save the new application type.

9.6.2 Editing a Patient Application Type

Follow these steps to edit an existing patient application type:

1. From the **Patient Application Types** listing page shown in Figure 9-21, select the application type you want to edit and then click **Edit** in the upper right corner of the page. Figure 9-23 shows an example of editing the *AAA Application Type* entry.



The screenshot shows a web form titled "Patient Application Type" with a dark green header. Below the header, the label "Application Type" is followed by "[required]". A text input field contains the text "AAA APPLICATION TYPE". At the bottom right of the form, there are two buttons: "Save" and "Cancel".

Figure 9-23: **Patient Application Type** form open for editing

2. Make any changes to the selected application type and click **Save** to save the changes made.

10.0 Registration Reports

The Practice Management Application Suite includes the Reports module, which produces a variety of reports regarding practice management. This chapter describes the patient registration-related reports available from the Reports module.

10.1 Reports Module Overview

The Reports module collects specific information from the RPMS database, and then formats the information for on-screen viewing or printing. You can also print reports as well as save them in a variety of different file formats.

Click **Reports** in the Practice Management Application Suite Taskbar (Figure 10-1) to open the **Reports** module.

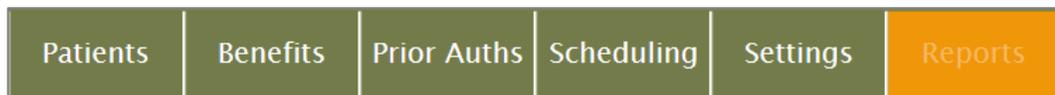


Figure 10-1: Taskbar with **Reports** Module Highlighted

10.1.1 Reports Toolbar

Regardless of the report type, the top of each report page includes the Reports Toolbar (Figure 10-2), which provides a variety of tools for handling and manipulating reports.



Figure 10-2: Reports Toolbar

10.1.1.1 Previous/Next Buttons

After you have generated more than one report of a specific type, use the Previous/Next buttons (Figure 10-3) to page through each of the previously-viewed reports.



Figure 10-3: Previous/Next buttons

10.1.1.2 Refresh Button

Use the Refresh button (Figure 10-4) to refresh a report.



Figure 10-4: Refresh button

The Refresh button is useful for ensuring a specific report contains the latest up-to-the-minute patient information.

10.1.1.3 Page Selection Buttons

Use the Page Selection buttons (Figure 10-5) to navigate through multi-page reports.



Figure 10-5: Page Selection buttons

You can also type a specific page number into the text box to jump quickly to that page.

10.1.1.4 Print Button

Use the Print button (Figure 10-6) to print the currently displayed report.



Figure 10-6: Print button

Clicking this button displays a standard print dialog box, which allows you to choose the printer to use as well as the page range and the number of copies of the report to print.

10.1.1.5 Save Button

Click the Save button (Figure 10-7) to save the report in a variety of file formats.



Figure 10-7: Save Button

The following file formats are supported:

- Acrobat (PDF)
- CSV (comma delimited)
- Excel 97-2003
- TIFF

10.1.1.6 Show/Hide Parameters Button

Use the Show/Hide Parameters button (Figure 10-8) to alternately show or hide the report parameters panel at the top of the report page.



Figure 10-8: Show/Hide Parameters button

Hiding the parameters panel allows you to see more report entries per page.

10.2 Registration Report Types

Once the Reports module is open, a listing of the available registration-related reports displays as shown in Figure 10-9.

Registration		↑	↓
View	Prior Authorizations Report		
View	Insurance Enrollment Report		
View	Benefit Cases Report		
View	Workload Report		

Figure 10-9: **Registration Reports** listing

Click **View** on the left of any of the report types to open that type of report. In most cases, you must provide additional parameters (such as starting and ending dates) in order to view the report.

10.3 Prior Authorizations Report

The **Prior Authorizations Report** shows information about Prior Authorizations covering a selected time period.

10.3.1 Prior Authorizations Report Parameters

When you first open the **Prior Authorizations Report** page, you must enter the **Start** and **End** dates as shown in Figure 10-10.



Figure 10-10: **Prior Authorizations Report** parameters

Specify the starting and ending days for the report, then click **Preview** to view the report. As an option, you can select the **Show Detail** check box to display additional details about the prior authorizations found.

10.3.2 Information on the Prior Authorizations Report

The detailed **Prior Authorizations Report** includes the following information for each patient found to have any prior authorization:

- Patient name
- Insurer
- Authorization number
- Authorization date
- Number of authorized visits or days
- Authorization type
- Visit date
- Status
- Authorizing Contacts, including the date, contact name, and any notes entered
- Additional Visits, including the date obtained, contact name, reference number, visit number, and any notes entered

Figure 10-11 shows an example of a typical **Prior Authorizations Report**.

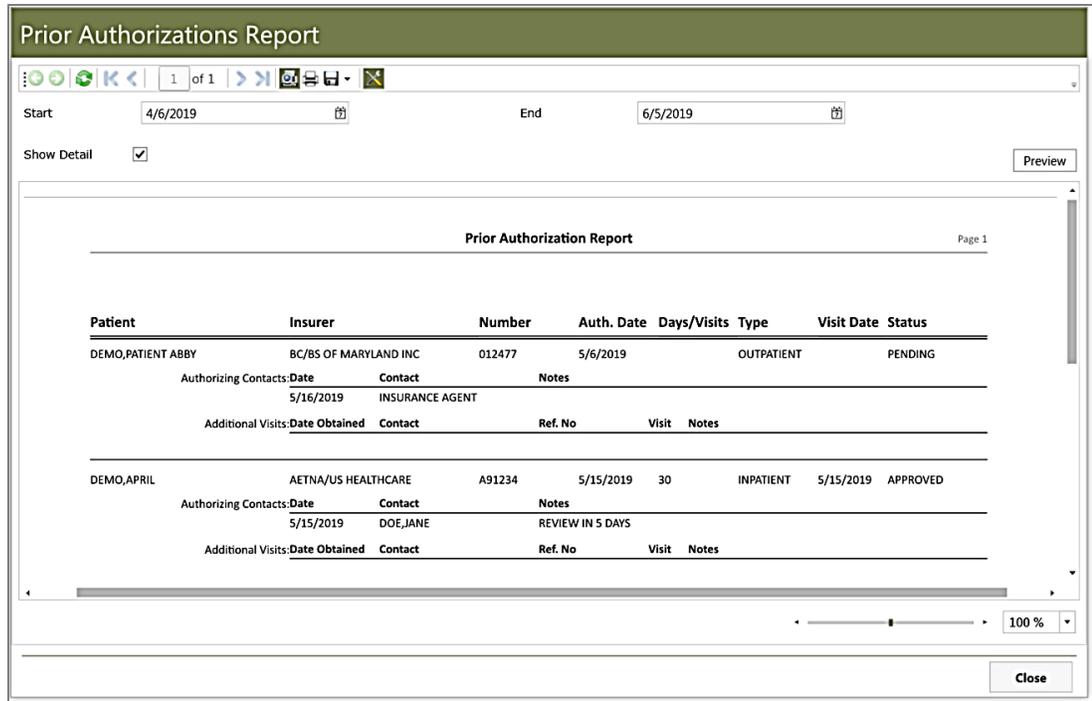


Figure 10-11: **Prior Authorizations Report** example

10.4 Insurance Enrollment Report

The **Insurance Enrollment Report** shows information about patient insurance enrollment filtered in several different ways.

10.4.1 Insurance Enrollment Report Parameters

When you first open the **Insurance Enrollment Report** page, you must specify the **Patient Age**, **Report Type**, and **Resource Type** as shown in Figure 10-12.



Figure 10-12: **Insurance Enrollment Report** parameters

The **Patient Age** field offers these choices:

- All Patients
- Patients 18 and Under
- Patients 65 and Older

The **Resource Type** field offers the following options. You can select any combination of these resource types, or choose the <select all> option to quickly select all of them:

- Medicare Part A
- Medicare Part B
- Medicare Part D
- Railroad Part A
- Railroad Part B
- Railroad Part D
- Medicaid
- Private

As an option, you can also choose from these **Patient Status** choices:

- All
- Active
- Deceased

The **Report Type** field is an additional option to search for patients that meet the following criteria:

- Patients Without Insurances
- Patients with Insurance

10.4.2 Information on the Insurance Enrollment Report

The **Insurance Enrollment Report** includes the following information for each patient matching the specified report parameters:

- Patient name and address
- Chart Number
- Home Phone
- Date Of Birth
- Social Security Number
- Insurance Type
- Provider
- Policy Number
- Start Date

- Coverage Type (if available)
- End Date (if available)

Figure 10-13 shows an example of a typical **Insurance Enrollment Report**.

Name	Chart #	Home Phone	Date Of Birth	SSN
CQM,TWEENTWENTYFIVE 871 CHERRY HILLS ALBUQUERQUE NM 88711	333280		1/15/2006	853011506P
		PRIVATE	UNITED HEALTHCARE INS.CO.	123456789
		6/1/2014		
CQM,TWEENFORTYFIVE 871 CHERRY HILLS ALBUQUERQUE NM 88711	333300		9/18/2004	377091804P
		PRIVATE	PRESBYTERIAN INS CO	123456789
		6/1/2014		
DEMO,DASH 1010 WEST MAIN ST ALBUQUERQUE NM 87999	554432	555-123-3333	12/25/2014	202122514P
		PRIVATE	UNITED HEALTH CARE	1231321321
		1/1/2015	SELF	

Figure 10-13: **Insurance Enrollment Report** example

10.5 Benefits Cases Report

The **Benefits Cases Report** shows information about patient benefits cases filtered based on several different parameters.

10.5.1 Benefits Cases Report Parameters

The **Benefits Cases Report** has fields for these parameters, all of which are required:

- **Case Type**
- **Case Status**
- **Start Date**
- **End Date**
- **Overall Status**

Figure 10-14 shows the parameters on the **Benefits Cases Report**.

Figure 10-14: **Benefits Cases Report** parameters

The **Case Type** field offers the following options. You can select any combination of these case types, or choose the <select all> option to quickly select all of them:

- Inpatient
- Outpatient
- Day Surgery
- Contract
- Dental

The **Case Status** field allows you to choose Open or Closed cases, or you can choose the <select all> option to quickly select both.

The **Overall Status** field offers the following options. You can select any combination of these application types, or choose the <select all> option to quickly select all of them:

- Pending
- Approved
- Denied
- Re-Submitted
- Refused
- Follow-Up Needed
- Entered in Error
- Over Income
- Screening Only

10.5.2 Information on the Benefits Cases Report

The **Benefits Cases Report** includes the following information for each patient matching the specified report parameters:

- Patient name

- Case Number
- Case Type
- Date Assigned/By
- Assigned To
- Date Completed/By
- Case Status
- Reason
- Application Type
- Date Obtained
- Obtained By
- Application Status
- Submission Date
- Submitted By
- Submission Reason

Figure 10-15 shows an example of a typical **Benefits Cases Report**.

The screenshot displays a 'Benefit Cases Report' window with the following search filters:

- Case Type: **OUTPATIENT**
- Case Status: **OPEN**
- Start: **4/6/2019**
- End: **6/5/2019**
- Overall Status: **PENDING, APPROVED, DENIED,**

The report table contains the following data:

Patient	Case No	Type	Date Assigned/By	Assigned To	Date Completed/By	Status
DEMO,PATIENTONE	C20011	OUTPATIENT	6/3/2019 USER,CLERK	USER,REGISTRATION		OPEN
Reason: NEW APPLICATION						
	Application Type	Date Obtained	Obtained By	Status	Submission Date	Submitted By
		6/5/2019		PENDING	6/2/2019	USER,REGISTRATION
	Submission Reason					
	MEDICAID APPLICATION					
DEMO,PATIENTD	C100012	OUTPATIENT	6/1/2019	DEMO,DOCTOR		OPEN
Reason:						
	Application Type	Date Obtained	Obtained By	Status	Submission Date	Submitted By
	SOCIAL SECURITY	6/5/2019		PENDING	6/1/2019	DEMO,DOCTOR
	Submission Reason					
	NEW REQUEST					

The window includes a 'Preview' button and a 'Close' button. The zoom level is set to 84%.

Figure 10-15: **Benefits Cases Report** example

10.6 Workload Report

The **Workload Report** shows the number of patient records added or edited over a selected period of time.

10.6.1 Workload Report Parameters

The **Workload Report** requires a **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the **Start Date** is set to the first day of the current month, and the **End Date** is set to the current day. Select the **Statistics Only** option to show only the numbers of patient records added and edited. Clear this option to include information about each of the patient records found.

Figure 10-16 shows the parameters used by the **Workload Report**.

The screenshot shows a web interface for the 'Workload Report'. At the top is a green header with the text 'Workload Report'. Below the header is a navigation bar with icons for back, forward, and search, and a page indicator showing '1 of 1 pages'. The main form area contains two date input fields: 'Start Date' with the value '6/1/2012' and 'End Date' with the value '6/28/2012'. Below these fields is a checkbox labeled 'Statistics Only' which is checked. A 'Preview' button is located in the bottom right corner of the form.

Figure 10-16: **Workload Report** parameters

10.6.2 Information on the Workload Report

When the **Statistics Only** option is cleared, the **Workload Report** includes this information for each patient record that matches the report parameters:

- Name
- Chart Number
- Home Phone
- Date of Birth
- Social Security Number

The report also shows the total number of patient records added and edited during the specified time period, as well as the total number of patient records in the database.

When the **Statistics Only** option is selected, the report shows only the total number of patient records added and edited during the specified time period, and the total number of patients registered in the database.

Figure 10-17 shows an example of a typical Workload report.

Workload Report

Start Date: 6/1/2019 End Date: 6/5/2019

Statistics Only [Preview](#)

Workload Report Page 1

Patients Added From 6/1/2019 to 6/5/2019

Name	Chart #	Home Phone	Date Of Birth	SSN
DEMO,PATIENTL	999332		2/20/1991	602022091P

Total patients added : 1

Patients Edited From 6/1/2019 to 6/5/2019

Name	Chart #	Home Phone	Date Of Birth	SSN
DEMO,PATIENTD	999342		1/17/1979	407011779P
DEMO,PATIENTB	999349		3/11/1939	XXX-XX-1139
DEMO,PATIENTE	999600		6/14/2017	707061417P

136 %

[Close](#)

Figure 10-17: **Workload Report** example

Appendix A Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is **FOR OFFICIAL USE ONLY**. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (ROB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site:

<https://home.ihs.gov/security/index.cfm><http://security.ihs.gov/>.

Note: Users must be logged on to the IHS D1 Intranet to access these documents.

The ROB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional ROB's that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.

- Be aware that personal use of information resources is authorized on a limited basis within the provisions Indian Health Manual Part 8, “Information Resources Management,” Chapter 6, “Limited Personal Use of Information Technology Resources.”

RPMS users shall not

- Retrieve information for someone who does not have authority to access the information.
- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)

- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall

- Be aware of the sensitivity of electronic and hard copy information and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.

- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall

- Have a unique User Identification/Account name and password.
- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.

- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give a password out over the phone.

A.1.8 Backups

RPMS users shall

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).

- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- Shall follow industry best standards for systems they are assigned to and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

APC Visit

Ambulatory Patient Care Visit: All types of health services that are provided on an outpatient basis, in contrast to services provided in the home or to persons who are hospital inpatients.

Dependents

A patient who is covered under another person's health insurance (Medicare, Medicaid, Private Insurance) or eligibility based on their dependent relationship to the policy holder/ eligible party. Dependents are often covered by third parties or eligibilities that they probably would not be eligible for otherwise. Children are the most common dependents.

Eligibility Date

Date that a patient became eligible for third-party financial coverage (Medicare, Medicaid, Private Insurance) of the patient's medical bills.

Eligibility End Date

The date by which a patient's third-party financial coverage must be approved/ renewed or the third-party is no longer responsible for the patient's medical bills. If a charge is billed after the eligibility end date for a date of service before the end date, the third-party financial coverage is still responsible for that bill. Any charges for dates of service after the Eligibility End Date are not the responsibility of the third-party financial coverage.

Embossed Card

A card with a patient's basic demographic and insurance information used for patient identification and billing. This card is kept in the patient's paper chart.

Employer

Company or person that has hired the patient, often offering private health insurance as part of the benefit package.

Face Sheet

A window or printout that contains a patient's demographic and insurance information.

HRN

Health Record Number: A number assigned to each patient by the Medical Records Department (if possible).

Inactive File

A patient file that was already in the system but was deemed unusable at some later time. Reasons for inactivation include patient death or grossly incorrect entry of patient data. Patient files can also be inactivated after a pre-determined period of inactivity.

Medicaid

State subsidized healthcare coverage that covers patients who do not have the resources to cover the costs of their own medical care. Medicaid coverage is not automatic and must be applied for and approved. A patient's Medicaid coverage is always billed last.

Medicare

State subsidized healthcare coverage that covers patients over the age of 65. Medicare coverage is not automatic and must be applied for and approved. A patient's Medicare coverage is always billed first. See also: Railroad Retirement, Part A Medicare, and Part B Medicare.

Non-Mandatory Information

Information that is not required for the Quick Entry process for adding new patients. This generally includes insurance information.

NPIRS

National Patient Information Resource System: Facility that collects and collates area statistical and patient data for official reporting purposes.

Queue

To instruct the computer to print a report at a specified later time. Queuing functions are usually used to print larger reports after hours, allowing the computer system to be used normally during business hours.

Railroad Retirement Medicare

A form of Medicare coverage that is extended only to retired railroad workers and their immediate family. See also: Medicare

RPMS

Resource and Patient Management System; suite of software programs maintained for IHS use.

Part A Medicare

A form of Medicare that covers only hospital visit and hospital visit related services. See also: Medicare, Part B Medicare

Part B Medicare

A form of Medicare that covers non-hospital visit services, including but not limited to general doctor visits and prescriptions. See also: Medicare, Part A Medicare

Private Insurance

Third-party financial coverage provided by a company (rather than a government agency). Private Insurance is usually provided through a patient's employer or patient's spouse's employer but can also be purchased independently. Private insurance always supersedes Medicaid coverage (billed before Medicaid) but is supplemental to Medicare coverage (billed after Medicare).

Security Key

Code, attached to an individual user's profile, that regulates the level of access that user has while using an RPMS program.

SSA

Social Security Administration: U.S. Government department responsible for managing Social Security benefits to seniors and eligible disabled citizens.

SSN

Social Security Number: A nine-digit number assigned by the Social Security Administration for tracking and Social Security benefit purposes.

Temporary Chart Numbers

A chart number that is assigned to a patient for the purpose of temporarily entering them into the RPMS system. A patient's temporary chart number must be replaced through the Patient Registration program before that patient's data can be transmitted to NPIRS.

Third Party

Any billing or credit agency responsible for paying or collecting fees for patient care. This includes Medicare, Medicaid, and all private insurances.

Veteran

A person who has previously served in the U.S. Military. Veterans generally receive special veteran's assistance for medical bills.

Acronym List

Acronym	Definition
AOB	Assignment of Benefits
APC	Ambulatory Patient Care
DOB	Date of Birth
GUI	Graphical User Interface
HICN	Health Insurance Claim Number
HIPAA	Health Insurance Portability and Accountability Act
HRN	Health Record Number
IHS	Indian Health Service
MBI	Medicare Beneficiary Identifier
MSP	Medicare Secondary Payer
NPIRS	National Patient Information Resource System
NPP	Notice of Privacy Practices
PCP	Primary Care Provider
QMB	Qualified Medical Beneficiary
RHI	Restricted Health Information
ROI	Release of Information
RPMS	Resource and Patient Management System
SLMB	Specific Low-Income Medical Beneficiary
SO/GI	Sexual Orientation/Gender Identity
SSA	Social Security Administration
SSN	Social Security Number
VA	Veterans Administration

Contact Information

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

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