



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Practice Management Application Suite

(BPRM)

Admission/Discharge/Transfer Module User Manual

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Preface

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

BPRM provides for the entry of medical record information for 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 and follow up patient care. Appropriate caution and checking should be employed to ensure that accurate data is entered into the system and, subsequently, transmitted to the National Patient Information Resource System and used by providers and staff.

1.0 Introduction

The Practice Management Application Suite (namespace: 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 Admission/Discharge/Transfer (ADT) module, related tasks available in the Registration module, reports provided by the Reports module, and options in the Settings module that affect patient admissions, discharges and transfers. 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 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.

Note: The GUI employed by this package shares most of its characteristics with those found in Microsoft® Windows 7 workstation applications including Microsoft Office 2007 and 2010. The terminology used to describe screen features and objects is significantly different from that used by earlier versions of Microsoft products. To minimize reader confusion over the long term, this manual uses the new terminology to describe these new GUI features.

3.0 Admission/Discharge/Transfer Module Operation

This section describes the features and functions of the BPRM Admission/Discharge/Transfer (ADT) module.

3.1 ADT Ribbon

The ADT ribbon (Figure 3-1) at the top of the ADT module display provides quick access to several different views of bed use and availability. It also provides controls to rapidly admit new patients and discharge or transfer existing ones.



Figure 3-1: ADT ribbon

The ADT ribbon contains three groups:

- **Mode** group
- **Bed Control** group
- **Tools** group

Click a control on the ADT ribbon to access the associated option.

Note: The options available in the ribbon may vary for different users depending on the access permissions granted to each user.

3.1.1 Mode Group

Use the options on the **Mode** group (Figure 3-2) on the ADT Ribbon to switch between different viewing modes.

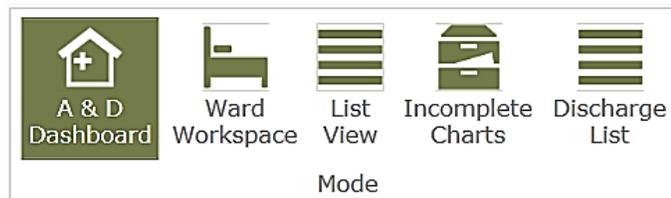


Figure 3-2: **Mode** group

The group includes five controls:

- **A&D Dashboard.** Click to see a real-time display of patient admissions and discharges, incomplete charts, and ward statistics for a facility. See Section 3.2 for more information about the A&D Dashboard.
- **Ward Workspace.** Click to show bed occupancy information broken down into individual wards. See Section 3.3 for more information about the Ward Workspace.
- **List View.** Click to show a listing of all active patient admissions. The listing can be sorted in a variety of ways. See Section 3.4 for more information about the List View.
- **Incomplete Charts.** Click to display or edit detailed information about any incomplete patient charts. See Section 3.5 for more information about the Incomplete Charts display.
- **Discharge List.** Click to show a listing of all discharges for a facility. The listing can be filtered and sorted in a variety of way. See Section 3.6 for more information about the Discharge List.

3.1.2 Bed Control Group

Use the options on the **Bed Control** group (Figure 3-3) to admit, transfer, or discharge a patient.



Figure 3-3: **Bed Control** group

The group includes three controls:

- **Admit.** Click to admit a patient. See Section 3.7 for more information about admitting a patient.
- **Transfer.** Click to transfer a patient. See Section 3.8 for more information about transferring a patient.
- **Discharge.** Click to discharge a patient. See Section 3.9 for more information about discharging a patient.

3.1.3 Tools Group

Use the options on the **Tools** group (Figure 3-4) to refresh the ADT display and to enlarge it.

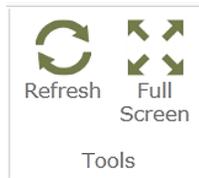


Figure 3-4: **Tools** group

The group includes two controls:

- **Refresh.** Click to refresh the workspace. This is useful to ensure the latest changes are being displayed, including those made by others.
- **Full Screen.** Click to view the various ADT views without the ADT ribbon and the Ward and Status panes (where applicable). Click the control again (now displayed in the upper left corner of the screen) to return to a normal view.

3.2 A&D Dashboard

Click the **A&D Dashboard** control in the **Mode** group of the ADT Ribbon to see current statistics about patient admissions and discharges for a facility.

Service	Admitted	Transferred In	Transferred Out	Deaths	Discharged
GENERAL MEDICINE	1		1	0	1
OBSTETRICS	1				
PEDIATRICS		1		0	1
SURGERY OBSERVATION	1				
Totals	Admitted: 3 Transferred In: 1 Transferred Out: 1 Deaths: 0 Discharged: 2				

Figure 3-5: A&D Dashboard

The A&D Dashboard has three tabbed pages:

- **Admission & Discharge Summary**
- **Ward Statistics**
- **Incomplete Chart Statistics**

In Figure 3-5, the **Admission & Discharge Summary** displays information for the current day's activity. Click the **Ward Statistics** tab or the **Incomplete Chart Statistics** tab to show additional information.

The information displayed on each page of the A&D Dashboard is described in Sections 3.2.1 through 3.2.3.

3.2.1 Admission & Discharge Summary

This page includes:

- **Service** (type of service)
- **Admitted** (patient count)
- **Transferred In** (patient count)
- **Transferred Out** (patient count)
- **Deaths**
- **Discharged** (patient count)

The bottom of the Admission & Discharge Summary page shows totals for each of the columns on the page for the current day.

3.2.2 Ward Statistics

This display includes:

- **Ward** (name)
- **Total Beds** (number of beds on the ward)
- **Occupied** (number of occupied beds on the ward)
- **Available** (number of available beds on the ward)
- **Out Of Service** (number of out of service beds on the ward)

The bottom of the **Ward Statistics** page shows overall totals for all wards and categories on the page for the current day.

3.2.3 Incomplete Chart Statistics

This display includes:

- **Month/Year**
- **Discharged** (number of patients released for that specific month and year)
- **Coded** (number of coded charts for that specific month and year)
- **Not Coded** (number of charts not coded for that specific month and year)
- **Exported** (number of charts coded and sent out to be paid for that specific month and year)
- **Errors** (number of errors noted for that specific month and year)

The bottom of the **Incomplete Chart Statistics** page shows overall totals for all months/years and the disposition of patient charts.

3.3 Ward Workspace

Click the **Ward Workspace** control in the **Mode** group of the ADT Ribbon to manage bed occupancy, admission details, and bed status on a per-ward basis. Figure 3-6 shows an example of a typical Ward Workspace.

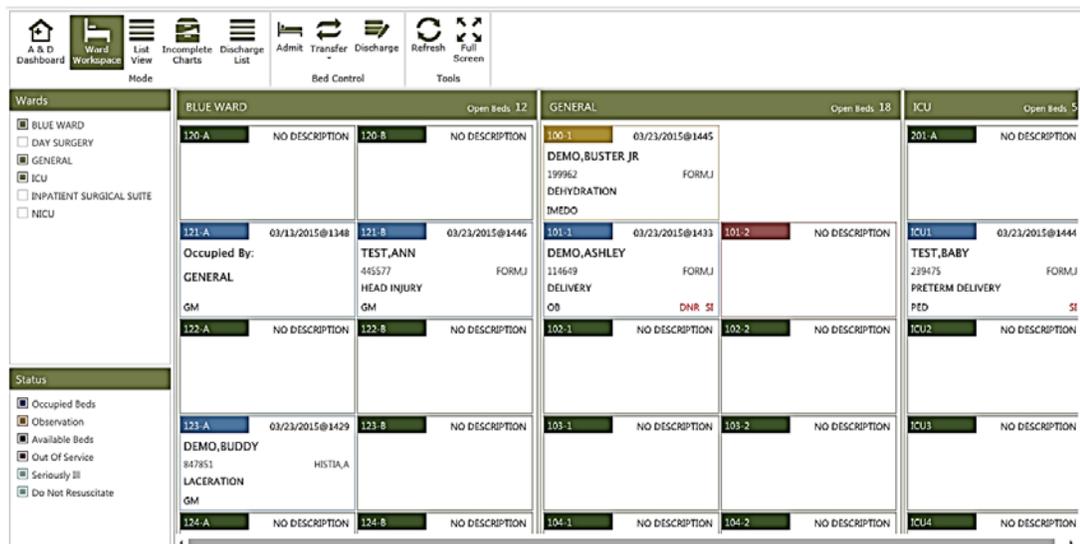


Figure 3-6: Typical Ward Workspace page

The **Wards** section on the left side of the Ward Workspace display lists the wards that are available for a given facility. Select one or more wards to display the bed occupancy for those wards. The wards available in the listing are determined by the Wards section of the Settings module. See Section 4.3 for more information about adding or editing wards.

Also on the left side of the Ward Workspace display is the **Status** section. Select one or more statuses in the listing to show only the beds matching the selected status(es). Choose from these statuses:

- **Occupied Beds**
- **Observation**
- **Available Beds**
- **Out of Service**
- **Seriously Ill**
- **Do Not Resuscitate**

Each bed in a ward is represented in the Ward Workspace with a "bed tile". Figure 3-7 shows an example of a typical bed tile.

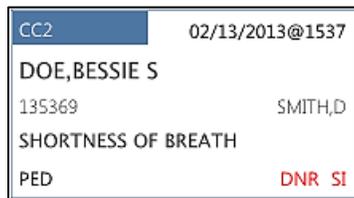


Figure 3-7: Bed tile example

The colored rectangle in the upper left corner of each bed tile shows the status of that bed. The colors displayed coincide with the color codes used in the **Status** section of the Ward Workspace. The bed number is also shown in the colored rectangle.

Bed tiles show the following information (when available):

- Status (by color) and bed number
- Admission date and time
- Patient name
- HRN
- Attending physician
- Short diagnosis
- Treating specialty
- Do Not Resuscitate (DNR) and/or Seriously Ill (SI) status

Alternatively, a bed tile may display limited patient information if the bed is assigned to more than one ward and it is currently occupied. Figure 3-7 shows an example of a multi-ward bed tile that is occupied in another ward.



Figure 3-8: Bed tile example

3.3.1 Occupied Bed Context Menu

Right-click on any of the bed tiles representing an occupied bed (including those for patients who have been admitted for observation) in the Ward Workspace display to access the options shown in Table 3-1.

Table 3-1: Options on the Occupied Bed context menu

Option	Description
Transfer Ward	Select this option to open the Transfer Ward dialog described in Section 3.8.1.
Transfer Bed	Select this option to open the Transfer Bed dialog described in Section 3.8.2.
Transfer Provider	Select this option to open the Transfer Provider dialog described in Section 3.8.3.
Transfer Treating Specialty	Select this option to open the Transfer Treating Specialty dialog described in Section 3.8.4.
Discharge Patient	Select this option to open the Discharge Patient dialog described in Section 3.9.
Seriously Ill	Select this option to indicate the patient is Seriously Ill (SI).
Do Not Resuscitate	Select this option to indicate a Do Not Resuscitate (DNR) document is on file for the patient.
View Admission Detail	Select this option to view details about the patient's admission. Selecting this option opens the Inpatient Admission Detail dialog described in Section 3.7.1.
Print A-Sheet	Select this option to print an A-Sheet for the patient assigned to the selected bed. See Section 5.12 for more information about the A-Sheet.
Select Patient in EHR	Select this option to open the patient's record in the Electronic Health Record (EHR) application. EHR will need to have a session running for the same user in order to run options.

3.3.2 Available Bed Context Menu

Right-click on any of the bed tiles representing an available bed in the Ward Workspace display to access the options shown in Table 3-2.

Table 3-2: Options on the Available Bed context menu

Option	Description
Admit Patient	Select this option to open the Admit a Patient dialog described in Section 3.7.
Inactivate Bed	Select this option to open the Inactivate Bed dialog described in Section 3.3.2.1.

3.3.2.1 Inactivate Bed

Click **Inactivate Bed** in the context menu (accessed with a right-click) of an available bed to inactivate the bed. Figure 3-9 shows an example of a typical **Inactivate Bed** dialog.

Figure 3-9: **Inactivate Bed** dialog

The dialog includes three fields:

- **Out of Service Date**
- **Reason**
- **Comments**

3.3.3 Out of Service Bed Context Menu

Right-click any of the bed tiles representing an Out Of Service bed to access this option.

Table 3-3: Options on the Out of Service Bed context menu

Option	Description
Reactivate Bed	Select this option to open the Reactivate Bed dialog described in Section 3.3.3.1.

3.3.3.1 Reactivate Bed

Click **Reactivate Bed** in the context menu (accessed with a right-click) of an Out of Service bed to reactivate the bed. Figure 3-10 shows an example of a typical **Reactivate Bed** dialog.

Figure 3-10: **Reactivate Bed** dialog

The **Reactivate Bed** dialog includes these fields:

- **Return to Service Date**
- **Comments**

The bed will become available after the date entered for Return to Service has passed. As an example, if you need to reactivate a bed to be used today, then you will need to enter yesterday’s date.

3.4 List View

Click the **List View** control in the **Mode** group of the ADT Ribbon to see a list view of all admitted patients. Figure 3-11 shows an example of a typical List View display.

Patient	Date of Birth	HRN	Admission Date	Ward	Room-Bed	Attending	Service	Length of Stay
DEMO,ASHLEY	02/27/1990	114649	03/23/2015 02:33 PM	GENERAL	101-1	FORM,JILL P	OBSTETRICS	1
DEMO,BUDDY	01/31/1990	847851	03/23/2015 02:29 PM	BLUE WARD	123-A	HISTIA,AMANDA	GENERAL MEDICINE	1
DEMO,BUSTER JR	06/20/1985	199962	03/23/2015 02:45 PM	GENERAL	100-1	FORM,JILL P	INTERNAL MED OBSERVATION	1
DRAGON,BLUE	01/01/1980	999045	03/23/2015 02:31 PM	DAY SURGERY	DS-1	HISTIA,AMANDA	SURGERY OBSERVATION	1
DRAGON,PINK	01/01/2010	999051	03/18/2015 02:43 PM	DAY SURGERY	DS-2	HISTIA,AMANDA	SURGERY DAY SURGERY	5
TEST,AMY	12/23/1934	679458	03/13/2015 01:48 PM	GENERAL	121-A	HISTIA,AMANDA	GENERAL MEDICINE	10
TEST,ANN	06/08/2009	445577	03/23/2015 02:46 PM	BLUE WARD	121-B	FORM,JILL P	GENERAL MEDICINE	1
TEST,BABY	02/01/2014	239475	03/23/2015 02:44 PM	ICU	ICU1	FORM,JILL P	PEDIATRICS	1

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Figure 3-11: Typical List View display

3.4.1 List View Fields

This List View includes these fields:

- **Patient** (name)
- **Date of Birth**
- **HRN**
- **Admission Date** (and time)
- **Ward**
- **Room-Bed** (current bed the patient is in)
- **Attending** (provider)
- **Service** (facility treating specialty)
- **Length of Stay** (in days)

3.4.2 Filtering the List View

The List View can be filtered to show only specific wards, and it can be sorted in several ways.

3.4.2.1 Ward Filter

Use the **Ward** list box to filter the List View and show only a single ward or to show all wards at a facility. The wards shown in the list box are controlled via the **Wards** option in the Settings Module as described in Section 4.2.

3.4.2.2 Sort By

Use the **Sort By** list box to sort the List View by any of these criteria:

- **Patient Name**
- **Ward Name**
- **Service**
- **Admission Date Asc** (ascending)
- **Admission Date Desc** (descending)

3.4.3 List View Context Menu

Right-click on any of the entries in the List View to display a context menu offering these actions:

Table 3-4: Options on the List View context menu

Option	Description
Transfer Ward	Select this option to open the Transfer Ward dialog described in Section 3.8.1.
Transfer Bed	Select this option to open the Transfer Bed dialog described in Section 3.8.2.
Transfer Provider	Select this option to open the Transfer Provider dialog described in Section 3.8.3.
Transfer Treating Specialty	Select this option to open the Transfer Treating Specialty dialog described in Section 3.8.4.
Discharge Patient	Select this option to open the Discharge Patient dialog described in Section 3.9.
Seriously Ill	Select this option to indicate the patient is Seriously Ill (SI).
Do Not Resuscitate	Select this option to indicate a Do Not Resuscitate (DNR) document is on file for the patient.
View Admission Detail	Select this option to view details about the patient's admission. Selecting this option opens the Inpatient Admission Detail dialog described in Section 3.7.1.
Print A-Sheet	Select this option to print an A-Sheet for the patient assigned to the selected bed. See Section 5.12 for more information about the A-Sheet.

3.5 Incomplete Charts

Click the **Incomplete Charts** control in the **Mode** group of the ADT Ribbon to view, add or edit incomplete charts. Figure 3-12 shows an example of a typical Incomplete Charts display.

Progress	Patient	HRN	Category	Service	Days Since Discharge	Discharge Ward	Discharge Date	Insurance Coverage	Delinquent
+ 0 of 1	DEMO,ASHLEY	114649	OBSERVATION	INTERNAL MED OBSERVATION	3		03/20/2015 11:40 AM	IHS	27 Days to Delinquent
+ 0 of 1	TEST,ANN	445577	HOSPITALIZATION	GENERAL MEDICINE	7	GENERAL	03/16/2015 04:09 PM	PVT	23 Days to Delinquent
+ 0 of 1	COYOTE,WILEY	999014	OBSERVATION	INTERNAL MED OBSERVATION	18		03/05/2015 01:15 PM	IHS	12 Days to Delinquent
+ 0 of 1	FUDD,ELMER	999017	HOSPITALIZATION	GENERAL MEDICINE	40	GENERAL	02/11/2015 03:05 PM	MCD/PVT	DELINQUENT

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Figure 3-12: Typical Incomplete Charts display

The **Incomplete Charts** listing includes this information:

- **Progress** (shows progress of chart processing)
- **Patient** (name)

- **HRN**
- **Category** (type of visit)
- **Service** (treating specialty)
- **Days Since Discharge**
- **Discharge Ward** (from which patient was discharged)
- **Discharge Date**
- **Insurance Coverage** (primary insurance)
- **Delinquent**

Click the plus sign (+) to the left of any of the listed charts to expand the information shown (if available). These additional fields are displayed for expanded individual records:

- **Provider**
- **Chart Deficiency**
- **Status**
- **Date Resolved**
- **Comments** (free text area for comments)

3.5.1 Filtering the Incomplete Charts Listing

The **Incomplete Charts** listing can be filtered and sorted in several ways.

3.5.1.1 Ward Filter

Use the **Ward** list box to filter the **Incomplete Charts** listing and show incomplete charts for either all wards or for a selected ward.

3.5.1.2 Category Filter

Use the **Category** list box to filter the **Incomplete Charts** listing by the type of visit. The list box offers these choices:

- **All**
- **Hospitalization**
- **In Hospital**
- **Observation**
- **Ambulatory**

3.5.1.3 Type

Use the Type list box to filter the **Incomplete Charts** listing by these chart types:

- **Incomplete**
- **Complete**

3.5.1.4 Sort By

Use the **Sort By** list box to sort the **Incomplete Charts** listing by any of these criteria:

- **Service**
- **Patient**
- **Category**
- **Discharge Date Asc** (ascending)
- **Discharge Date Desc** (descending)

3.5.1.5 Filter Providers

Use the **Filter Providers** text box to filter the **Incomplete Charts** listing to show only the chart deficiencies associated with that provider. Type the first few characters of a provider's name using a LAST,FIRST format.

3.5.2 Incomplete Charts Context Menu

Right-click on any of the entries in the **Incomplete Charts** listing to display a context menu offering this action:

Table 3-5: Options on the Incomplete Charts context menu

Option	Description
View Detail	Select this option to display the Incomplete Chart Detail – Discharge page described in Section 3.5.3.

3.5.3 Incomplete Chart Detail page

Click **View Detail** in the **Incomplete Chart** context menu to display the **Incomplete Chart Detail** page (Figure 3-13).

Incomplete Chart Detail - Discharged on 6/7/2013 Action

Insurance: MCD Category: OBSERVATION Service: FAMILY PRACTICE OBSERVATION Discharge Ward: _____

Date Chart Received: 6/7/2013

Date Chart Coded: 7/23/2013 Chart Coded By: _____

Chart Deficiencies						<input type="button" value="Add"/> <input type="button" value="Edit"/>
Provider	Chart Deficiency	Date Resolved	Date Delinquent	Date Deleted	Resolution Status	
ADAM,ADAM	COMPLETE DRG SHEET	07/23/2013	07/07/2013		Resolved	
ALLJAMES	SIGN A SHEET	07/23/2013	07/07/2013		Resolved	

Figure 3-13: **Incomplete Chart Detail** page

The top of the **Incomplete Chart Detail** page includes these fields:

- **Insurance**
- **Category**
- **Service**
- **Discharge Ward**

Additional details may be displayed below these fields, depending on what tracking options and dates have been entered for the selected chart.

3.5.3.1 Chart Tracking Section

Chart tracking options are available as part of the chart completion process. Click **Action** on the upper right of the **Incomplete Chart Detail** page to add dates for any of the following options:

Table 3-6: Options under Actions menu for Chart Tracking Dates

Option	Description
Date Chart Received	Enter the date when the patient chart was received by incomplete charts
Chart Tagged	Enter the date when initial review was performed and deficiencies were tagged.
Insurance Identified	Enter the date when the patient's insurance information was received.
Chart Completed	Enter the date when all deficiencies have been resolved and the chart is completed.

Option	Description
Bill Prep Completed	Enter the date when the chart is ready for billing and the person who prepared the records for billing.
Chart Billed	Enter the date when the associated visit has been billed.
Chart Deleted	Enter a deletion date for a chart that has been entered by mistake or is a duplicate.
Ready To Code	Enter the date when chart paperwork is complete and coding can begin.
Chart Coded	Enter the date the associated visit was coded in PCC and the person who coded the record.

3.5.3.2 Chart Deficiencies Section

The **Incomplete Chart Detail** page also includes the **Chart Deficiencies** section. This section lists the following information:

- **Provider**
- **Chart Deficiency**
- **Date Resolved**
- **Date Delinquent**
- **Date Deleted**
- **Resolution Status**

Click **Add** in the upper right of the **Chart Deficiencies** section to add deficiencies to a chart.

The **Incomplete Chart Deficiency** dialog (Figure 3-18) displays.

Figure 3-14: **Incomplete Chart Deficiency** dialog

The dialog includes the following fields. See the Glossary for additional definitions:

Table 3-7: Fields on the Incomplete Chart Deficiency form

Option	Description
Chart Deficiency	Use this field to enter a new chart deficiency. Type one or more letters in the chart deficiency name to display a list of search results or you can enter a ?? to view a list of all deficiencies.
Provider	Use this field to assign a provider to the chart deficiency. Type one or more letters in the provider's name to display a list of results or you can enter ?? to view a list of all providers.
Date Delinquent	Read-only field indicating the date when the chart will become delinquent. This date is based on the ADT Parameter – Days to Delinquency.
Comments	Use this free-text field to enter comments for the chart deficiency if needed

To edit the fields listed in Table 3-7, select an existing deficiency and click **Edit** in the upper right of the **Chart Deficiencies** section to edit that deficiency.

Once you've finished entering and editing chart deficiencies, click **Save** to complete the changes for the incomplete change details page or click **Cancel** to go back to the previous page.

To resolve or delete a Chart Deficiency, open the incomplete chart detail page. In the Chart Deficiencies section, you should see two options available next to each deficiency (Figure 3-15).

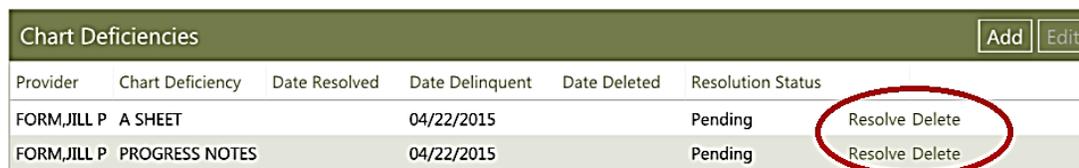


Chart Deficiencies						Add	Edit
Provider	Chart Deficiency	Date Resolved	Date Delinquent	Date Deleted	Resolution Status		
FORM,JILL P	A SHEET		04/22/2015		Pending	Resolve	Delete
FORM,JILL P	PROGRESS NOTES		04/22/2015		Pending	Resolve	Delete

Figure 3-15: Chart Deficiencies – Resolve and Delete options

Click on the **Resolve** option to open the edit deficiency screen with the **Date Resolved** field now available. Confirm the information and click **Save** to mark a deficiency as resolved.

Click on the **Delete** option to open the edit deficiency screen with the **Date Deleted** and **Delete Reason** field now available. Enter a deletion reason and click **Save** to mark a deficiency as deleted.

Chart Deficiencies						Add	Edit
Provider	Chart Deficiency	Date Resolved	Date Delinquent	Date Deleted	Resolution Status		
FORM,JILL P	A SHEET	03/24/2015	04/22/2015		Resolved		
FORM,JILL P	PROGRESS NOTES		04/22/2015	03/24/2015	Deleted		

Figure 3-16: Chart Deficiencies – Resolved and Deleted entries

3.6 Discharge List

Click the **Discharge List** control in the **Mode** group of the ADT Ribbon to view a list of discharged patients. Figure 3-17 shows an example of a typical Discharge List display.

Patient	Date of Birth	HRN	Admission Date	Discharge Date	Ward	Attending	Service	Length of Stay	Discharge type
COYOTE,WILEY	01/01/1960	999014	03/05/2015 01:10 PM	03/05/2015 01:15 PM	BLUE WARD	DEMO,DOCTOR	INTERNAL MED OBS	1	REGULAR DISCHARGE
COYOTE,WILEY	01/01/1960	999014	02/27/2015 03:12 PM	02/27/2015 03:12 PM	BLUE WARD	FORM,JILL P	GENERAL MEDICINE	1	REGULAR DISCHARGE
DEMO,FERN	01/01/1960	142601	02/25/2015 12:28 PM	02/27/2015 03:04 PM	BLUE WARD	ADAMS,SAMUEL L MD	GENERAL MEDICINE	2	REGULAR DISCHARGE
TREET,RON	08/04/1935	295165	02/12/2015 11:58 AM	02/27/2015 02:54 PM	BLUE WARD	ABBASZADEGAN,STEPHEN	GENERAL MEDICINE	15	REGULAR DISCHARGE
HOBBS,CALVIN JAY	10/31/1955	224421	02/18/2015 09:22 AM	02/27/2015 01:06 PM	BLUE WARD	DEMO,DOCTOR	PEDIATRICS	9	REGULAR DISCHARGE
BUNNY,BABS	01/01/1980	999019	02/25/2015 02:05 PM	02/27/2015 12:51 PM	BLUE WARD	FORM,JILL P	GENERAL MEDICINE	2	REGULAR DISCHARGE
DEMO,FERN	01/01/1960	142601	02/25/2015 12:24 PM	02/25/2015 12:27 PM	BLUE WARD	DEMO,DOCTOR	INTERNAL MED OBS	1	REGULAR DISCHARGE
DEMO,BERNADINE MARIA	11/11/1992	140558	02/25/2015 12:14 PM	02/25/2015 12:20 PM	BLUE WARD	ABRIANLSTEPHANY J RN	INTERNAL MED OBS	1	REGULAR DISCHARGE
TEST,ANGELINA CRYSTALE	07/08/1989	140437	02/25/2015 12:14 PM	02/25/2015 12:19 PM	BLUE WARD	DEMO,DOCTOR	GENERAL MEDICINE	1	REGULAR DISCHARGE
PIG,PETUNIA I	01/01/1950	999022	02/23/2015 09:40 AM	02/23/2015 04:38 PM	BLUE WARD	FORM,JILL P	GENERAL MEDICINE	1	REGULAR DISCHARGE

Figure 3-17: Typical Discharge List display

3.6.1 Filtering the Discharge List

The Discharge List can be filtered and sorted in several ways.

3.6.1.1 Ward Filter

Use the **Ward** list box to filter the Discharge List and show discharged patients for either all wards or for a selected ward.

3.6.1.2 Date Filter

Use the Date list box to filter the Discharge List based on these date criteria:

- All
- Today
- Last 14 Days
- Last 30 Days

3.6.1.3 Sort By

Use the **Sort By** list box to sort the Discharge List by any of these criteria:

- **Discharge Date Desc** (descending)
- **Discharge Date Asc** (ascending)
- **Patient**
- **Ward**

3.6.2 Discharge List Context Menu

Right-click on any of the entries in the Discharge List to display a context menu offering this action:

Table 3-8: Discharge List Context Menu

Option	Description
Cancel Discharge	Select this option to cancel a discharge. Using this option will place the patient back into their discharged ward without a bed assigned.
View Admission Detail	Select this option to view details about the patient's admission. Selecting this option opens the Inpatient Admission Detail dialog described in Section 3.7.1.
Print A-Sheet	Select this option to print an A-Sheet for the patient assigned to the selected bed. See Section for more information about the 5.12 A-Sheet.

3.7 Admit

Click the **Admit** control on the **Bed Control** group of the ADT Ribbon to admit a patient. The **Admit a Patient** dialog (Figure 3-18) displays.

Figure 3-18: **Admit a Patient** dialog

The dialog includes the following fields. See the Glossary for additional definitions:

Table 3-9: Fields on the Incomplete Chart Deficiency form

Option	Description
Select Patient	Type all or part of the patient's name (using a LAST, FIRST format) in the Select Patient field. If the name is found, click the patient's name in the listing displayed.
Admission Date	Field defaults to current date and time. User can edit the date and time if needed.
Exclude from Directory	Select the checkbox to indicate that the patient does not wish to be listed in the Facility Directory for this admission. When selected, the patient's information will not be displayed on the Bed Tiles in the Ward Workspace.
Admission Type – UB-04	Select from the list options to indicate the Admission Types.
Admission Source – UB-04	Select from the list options to indicate the Source of admission
Admission Type	Select from the list options to indicate the type of movement for this admission.
Diagnosis (Short)	Enter free-text description of the diagnosis associated with this admission [3-30 characters].

Option	Description
Ward Location	Select from the list options the ward which the patient will be admitted to.
Room-Bed	Select from the list options the room-bed which the patient will be admitted to. List is based on the currently selected ward location.
Facility Treating Specialty	Type all or part of the facility treating specialty name or enter ?? to view a list of available options.
Referring Provider	Enter the name of the referral provider using the LAST,FIRST format.
Admitting Provider	Type all or part of the Admitting provider's name (using a LAST,FIRST format). If the name is found, click the provider's name in the listing displayed.
Attending Physician	Type all or part of the Attending physician's name (using a LAST,FIRST format). If the name is found, click the provider's name in the listing displayed.
Condition	Select from the list options to designate a patient as Seriously Ill (SI), Do Not Resuscitate (DNR), or both. This will be indicated on their Bed Tile in the Ward Workspace.
Print A-Sheet	Select the checkbox to display the print A-sheet prompt immediately after the form is saved.
Comments	Enter free-text comments related to this admission.

3.7.1 Inpatient Admission Detail

Click **View Admission Detail** in the Ward Workspace or List View context menu to view detailed information about that patient's admission. (Access this context menu by right-clicking the patient's information in the Ward Workspace or List View.) Figure 3-19 shows an example of a typical **Inpatient Admission Detail** dialog.

Inpatient Admission Detail

Admission Date [required] 3/13/2015 1:48 PM
 Admission Type UB-04 [required] EMERGENCY
 Admission Source UB-04 [required] CLINIC REFERRAL
 Exclude from Directory

Admission Type [required] DIRECT
 Ward Location [required] BLUE WARD
 Room-Bed 121-A
 Diagnosis (Short) [required] SHORTNESS OF BREATH

Facility Treating Specialty [required] GENERAL MEDICINE
 Referring Provider
 Admitting Provider [required] FORM, JILL P
 Attending Physician [required] FORM, JILL P

Comments

Transfers [Edit]

Date	Type of Movement	Transfer To
3/20/2015 12:00 AM	INTERWARD TRANSFER	GENERAL

Discharge Date 3/23/2015 2:04 PM
 Discharge Type [required] REGULAR DISCHARGE
 Discharge Ward GENERAL

Save Cancel

Figure 3-19: Typical **Inpatient Admission Detail** dialog

The **Inpatient Admission Detail** dialog includes the following fields. See the Glossary for additional definitions:

- **Admission Date**
- **Admission Type-UB-04**
- **Admission Source-UB-04**
- **Exclude from Directory**
- **Admission Type**
- **Ward Location**
- **Room Bed**
- **Diagnosis (Short)**
- **Facility Treating Specialty**
- **Referring Provider**
- **Admitting Provider**

- **Attending Physician**
- **Comments**

3.7.1.1 Transfers Section

The Transfers section of the **Inpatient Admission Detail** dialog includes these additional fields:

- **Date** (Transfers)
- **Type of Movement**
- **Transfer To**

3.7.1.2 Discharge Section

The Discharge section of the **Inpatient Admission Detail** dialog is only visible after the patient has been discharged and includes these additional fields:

- **Discharge Date**
- **Discharge Type**
- **Discharge Ward**
- **Transfer Facility (if applicable)**

3.8 Transfer

Click the **Transfer** control on the **Bed Control** group of the ADT Ribbon to display the Transfer menu (Figure 3-20) and transfer a patient to a different ward, bed, provider, or treating specialty.



Figure 3-20: Transfer menu

Each option on the menu provides a dialog associated with that type of transfer. These dialogs are described in Sections 3.8.1 through 3.8.4.

Tip: You can also transfer a patient by right-clicking the patient's name or assigned bed in the Ward Workspace or List View screens and selecting the **Transfer** option.

3.8.1 Ward

Select **Ward** on the Transfer menu to transfer a patient to a different ward. When this option is selected, the **Ward Transfer** dialog (Figure 3-21) displays.

Figure 3-21: **Ward Transfer** dialog

The Ward Transfer dialog includes these fields:

- **Select Patient (Limited to currently admitted patients)**
- **Time of Transfer**
- **Ward**
- **Bed**
- **Associate Treating Specialty Transfer**
- **Treating Specialty.** Only displayed when Associate Treating Specialty Transfer option is enabled.
- **Attending Physician.** Only displayed when Associate Treating Specialty Transfer option is enabled.
- **Comments.** Only displayed when Associate Treating Specialty Transfer option is enabled.

3.8.2 Bed

Select **Bed** on the Transfer menu to transfer a patient to a different bed. When this option is selected, the **Switch Beds** dialog (Figure 3-22) displays.

Figure 3-22: **Switch Beds** dialog

The dialog includes three fields:

- **Select Patient (Limited to currently admitted patients)**
- **Time of Transfer**
- **New Bed**

3.8.3 Provider

Select **Provider** on the Transfer menu to transfer a patient to a different attending provider. The **Provider Change** dialog (Figure 3-23) displays.

Figure 3-23: **Provider Change** dialog

The dialog includes four fields:

- **Select Patient (Limited to currently admitted patients)**
- **Time of Transfer**
- **Attending Physician**
- **Comments**

3.8.4 Treating Specialty

Select **Treating Specialty** on the Transfer menu to transfer a patient to a different treating specialty. The **Treating Specialty Transfer** dialog (Figure 3-24) displays.

Figure 3-24: **Treating Specialty Transfer** dialog

The dialog includes five fields:

- **Select Patient (Limited to currently admitted patients)**
- **Time of Transfer**
- **Treating Specialty**
- **Attending Physician**
- **Comments**

3.9 Discharge

Click the **Discharge** control on the ADT Ribbon to discharge a patient. When this option is selected, the **Discharge Patient** dialog (Figure 3-25) displays.

Figure 3-25: **Discharge Patient** dialog

The dialog includes four fields:

- **Select Patient (Limited to currently admitted patients)**
- **Discharge Date**
- **Type of Discharge**
- **Discharge Status-UB-04**
- **Transferred To**

Selecting Transferred as a Type of Discharge will display the Transferred To field to indicate the facility the patient is being moved to.

Selecting Death as a Type of Discharge will automatically populate the Death Information in the Patient module which will mark the patient record as inactive.

Tip: You can also discharge a patient by right-clicking on the patient's name or assigned bed in the Ward Workspace or List View screens and selecting the **Discharge** option.

4.0 ADT Configuration

Unlike the other modules in BPRM, the **Settings** module does not directly control or modify patient records. Instead, it controls a variety of application settings for other modules, allowing such things as available appointment types, employer names, insurers, and clinics to be changed or added. Changes made within the Setting 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.
Log off and log on to the BPRM application for any scheduling configuration changes to take effect.

Open the Settings module by clicking **Settings** in the Taskbar, as shown in Figure 4-1.



Figure 4-1: 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.

4.1 Table Maintenance

Click **Table Maintenance** in the selection pane of the Settings Module to see the main **Table Maintenance** page. Figure 4-2 shows an example of the Settings module with the **Table Maintenance** page displayed.

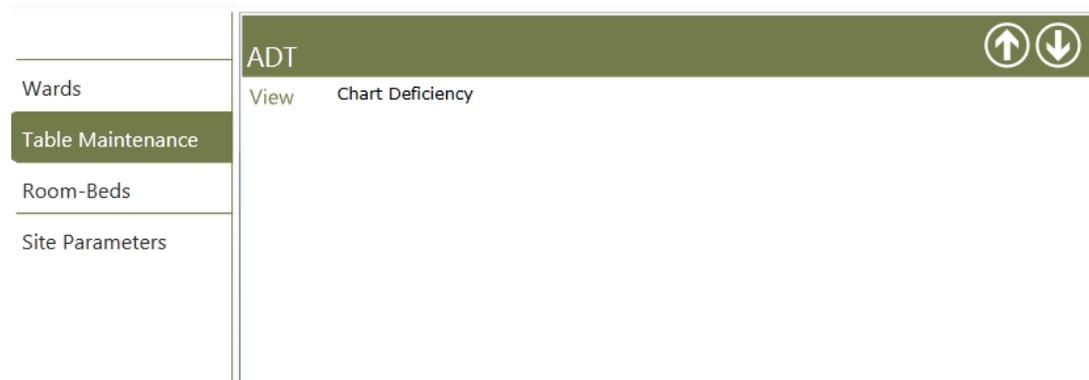


Figure 4-2: **Table Maintenance** page

4.1.1 Chart Deficiency

Use the **Chart Deficiency** option on the **Table Maintenance** page to add chart deficiencies to the RPMS database or edit information about existing ones. To use this option, click **View** to the left of the **Chart Deficiency** heading on the **Table Maintenance** page shown in Figure 4-2. A **Chart Deficiency** listing page similar to that shown in Figure 4-3 will be displayed.

Name	Abbreviation	Grouping	Active
A TEST	ATST	ASH	<input type="checkbox"/>
ADD DIAGNOSIS			<input type="checkbox"/>
C/O DIET ORDERS			<input type="checkbox"/>
CO-SIGN ORDERS			<input type="checkbox"/>
COMP MEDICARE/MEDICAID CERT	MMC		<input type="checkbox"/>
COMPLETE CCFS			<input type="checkbox"/>
COMPLETE D/C PROGRESS NOTE			<input type="checkbox"/>
COMPLETE DEATH CERTIFICATE	CDC		<input type="checkbox"/>
COMPLETE DISCHARGE NOTE	CDN		<input type="checkbox"/>
COMPLETE DRG SHEET	CDS	ASH	<input type="checkbox"/>
COMPLETE ER RECORD	CER	SIG	<input type="checkbox"/>
COMPLETE HISTORY I, II, III	CHIS		<input type="checkbox"/>
COMPLETE LEVEL OF CARE	CLC		<input type="checkbox"/>
COMPLETE NARRATIVE SUMMARY	CNS	SUM	<input type="checkbox"/>
COMPLETE NEWBORN RECORD	CNR		<input type="checkbox"/>

Figure 4-3: **Chart Deficiency** listing

4.1.2 Adding a Chart Deficiency

Follow these steps to add a chart deficiency to the RPMS database:

1. Click **Add** on the **Chart Deficiency** listing page. The **Chart Deficiency** dialog shown in Figure 4-4 will be displayed.

Figure 4-4: **Chart Deficiency** dialog

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

4.1.3 Editing a Chart Deficiency

Follow these steps to edit an existing chart deficiency:

1. Select the chart deficiency to edit then click **Edit** on the **Chart Deficiency** listing page. A **Chart Deficiency** dialog similar to that shown in Figure 4-5 displays.

Figure 4-5: **Chart Deficiency** dialog

2. Edit the information in the fields of the dialog as needed.
3. Click **Save** to save the entries and close the dialog, or click **Cancel** to close the dialog without saving the entries.

4.2 Wards

Click **Wards** in the selection pane of the Settings module to see the Wards page.

Figure 4-6 shows an example of the Settings module with the **Wards** page displayed.

Name	Abbreviation	Division	Institution	Inactive	Service	Primary Location	Nursing Service
INPATIENT	INPAT	DEMO HOSPITAL	DEMO HOSPITAL	<input type="checkbox"/>			
EAST	EAST	DEMO HOSPITAL	DEMO HOSPITAL	<input type="checkbox"/>			
NORTH	NORTH	DEMO HOSPITAL	DEMO HOSPITAL	<input type="checkbox"/>			
SOUTH	SOUTH	DEMO HOSPITAL	DEMO HOSPITAL	<input type="checkbox"/>			
WEST	WEST	DEMO HOSPITAL	DEMO HOSPITAL	<input type="checkbox"/>			
CRITICAL CARE	CCU	DEMO HOSPITAL	DEMO HOSPITAL			UNKNOWN	ICU

Figure 4-6: **Wards** page

Use the **Wards** page of the Settings module to add or remove wards from those available in the BPRM suite, and to set or modify details for each ward.

4.2.1 Filtering the Wards Page

Use the **Filter** text box to filter the listing. Type all (or the first few characters) of a ward name to show only the ward(s) matching that criteria in the listing.

4.3 Adding or Editing a Ward

Use the **Wards** page to add a new ward or to edit the details about an existing ward. Click **Add** in the upper right corner of the page to add a new ward, or select an existing ward and click **Edit** in the upper right corner of the page to edit the details about that ward. In either case, the **Ward Configuration** page displays.

The examples shown in the following sections show a ward being edited on the **Ward Configuration** page. When creating a new ward, the dialogs displayed are the same, although the fields on the dialog will be blank.

Regardless of whether you are adding a new ward or editing an existing one, the Ward Configuration page has two tabs:

- **General** tab
- **Room-Bed** tab

The fields shown on these tabs are described in Sections 4.3.1 and 4.3.2.

4.3.1 Ward Configuration – General Tab

Click the **General** tab on the **Ward Configuration** page to display the dialog shown in Figure 4-7.

Ward Configuration - EAST Inactivate Reactivate

General Room-Bed

Name [required] EAST Abbreviation [required] EAST Division [required] DEMO HOSPITAL Institution DEMO HOSPITAL

Nursing Service [required] Seriously Ill Ward Print Order [required] 2.00

Adult Medical Beds 5 Adult Surgical Beds 5 Pediatric Medical Beds 0 Pediatric Surgical Beds 0

Newborn Beds 0 Obstetric Beds 0 Tuberculosis Beds 0 Alcohol/Substance Abuse Beds 0

Mental Health Beds 0

Progressive Care Unit PCU Beds 0 ICU/SCU Ward ICU/SCU Beds 0

Authorization Dates Add

Authorization Date	Bed Type	Number of Beds
01/01/2009	ADULT MEDICAL	5
01/02/2009	ADULT SURGICAL	5

Save Cancel

Figure 4-7: Ward Configuration - General tab

4.3.1.1 Inactivate or Reactivate a Ward

Use the **Inactivate** option on the upper right of the **Ward Configuration** page to inactivate the selected ward. Wards that have active admissions cannot be inactivated. Similarly, use the **Reactivate** option to reactivate the selected ward.

4.3.1.2 Fields on the Ward Configuration – General Tab

The **General** tab of the **Ward Configuration** page includes the following fields:

Table 4-1: Fields on the Ward Configuration form

Option	Description
Name	Enter the name of the ward as it will be displayed on reports and in the Ward Workspace.
Abbreviation	Enter the abbreviation for this ward
Division	Select from the list option the Medical Center Divisions for this ward.
Institution	Read-only field auto-populated when Division is selected.

Option	Description
Nursing Service	Select from the list options the nursing service associated with this ward
Seriously Ill Ward	Select option to indicate if patients entered in this ward should be placed on the seriously ill list.
Print Order	Enter a number between .01 and 9999 to indicate the order in which the wards will print and calculate on reports.
Adult Medical Beds	Read-Only field; Displays the number of authorized beds for this type.
Adult Surgical Beds	Read-Only field; Displays the number of authorized beds for this type.
Pediatric Medical Beds	Read-Only field; Displays the number of authorized beds for this type.
Pediatric Surgical Beds	Read-Only field; Displays the number of authorized beds for this type.
Newborn Beds	Read-Only field; Displays the number of authorized beds for this type.
Obstetric Beds	Read-Only field; Displays the number of authorized beds for this type.
Tuberculosis Beds	Read-Only field; Displays the number of authorized beds for this type.
Alcohol/Substance Abuse Beds	Read-Only field; Displays the number of authorized beds for this type.
Mental Health Beds	Read-Only field; Displays the number of authorized beds for this type.
Progressive Care Unit	Select this checkbox to indicate if this ward is an ICU Step-Down Unit.
PCU Beds	Read-Only field; Displays the number of authorized beds for this type.
ICU/SCU Ward	Select this checkbox to indicate if this ward is an Intensive Care or Special Care Unit.
ICU/SCU Beds	Read-Only field; Displays the number of authorized beds for this type.

When done entering the **General** tab information, click **Save** to save the information, or click **Cancel** to close the page without saving the information.

4.3.1.3 Authorization Dates Section

The **Authorization Dates** section is displayed at the bottom of the **Ward Configuration** screen when you are editing a ward. Use this section to update the authorized beds for the selected ward.

Click **Add** in the **Authorization Dates** section of the General tab of the **Ward Configuration** to display the **Add/Edit Authorization Date** dialog (Figure 4-8).

Figure 4-8: **Add/Edit Authorization Date** dialog

The dialog includes these fields:

- **Authorization Date**
- **Authorized Bed Type**
- **Authorized Number of Beds**

When done entering the **Add/Edit Authorization Date** dialog information, click **OK** to save the information, or click **Cancel** to close the dialog without saving the information.

4.3.2 Ward Configuration – Room-Bed Tab

Click the **Room-Bed** tab on the **Ward Configuration** page to display the **Room-Beds** listing shown in Figure 4-9.

Name	Description	Bed Phone	Out of Service
E101-AMED	ADULT MEDICAL		NO
E102-AMED	ADULT MEDICAL		NO
E103-AMED	ADULT MEDICAL		YES
E104-AMED	ADULT MEDICAL		NO
E105-AMED	ADULT MEDICAL		NO
E106-ASURG	ADULT SURGICAL		NO
E107-ASURG	ADULT SURGICAL		NO
E108-ASURG	ADULT SURGICAL		NO

Figure 4-9: **Ward Configuration - Room-Bed** tab

The **Room-Bed** tab displays the following information about the room-beds for the selected ward:

- **Name**
- **Description**
- **Bed Phone**
- **Out of Service**

4.3.2.1 Adding a Room-Bed

Click **Add** in the upper right of the **Room-Bed** tab to display the **Add Room-Bed** dialog (Figure 4-10) and assign a room-bed to the selected ward.

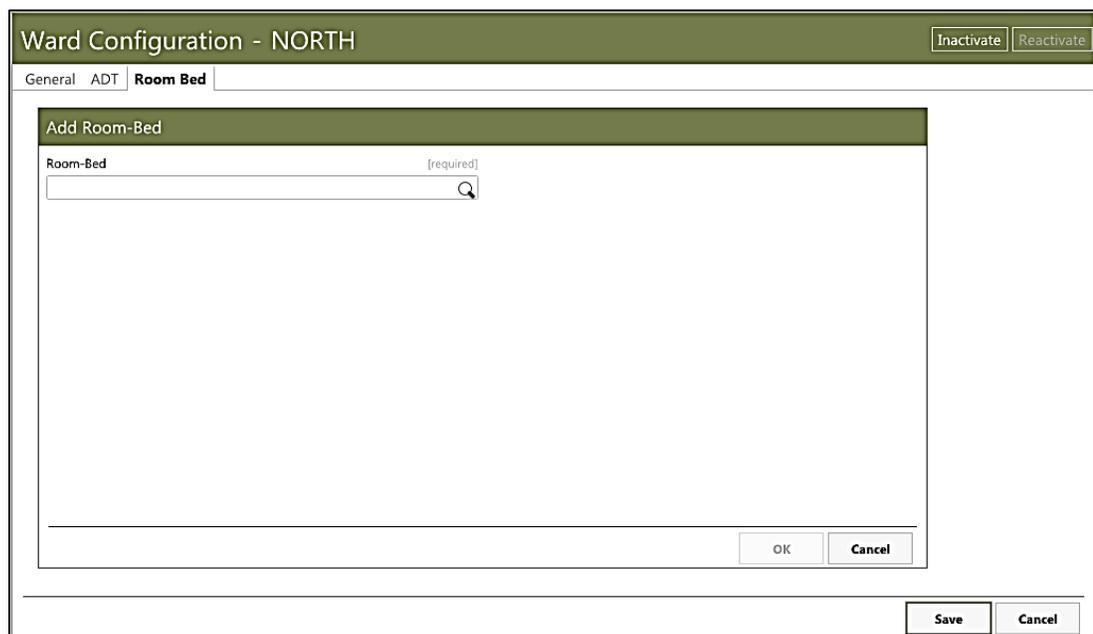


Figure 4-10: **Add Room-Bed** dialog

The **Add Room-Bed** dialog contains a single field. Type the first few characters of the Room-Bed name into the search box then select the room-bed number to add to the selected ward. See section 4.5 for more information on adding Room-Beds to this field.

4.3.2.2 Removing a Room-Bed

To remove a room-bed assigned to a selected ward, highlight the room-bed to remove, then click **Remove** in the upper right of the **Room-Bed** tab. A confirmation message (Figure 4-11) displays. Click **OK** to remove the selected room-bed, or click **Cancel** to cancel the removal.

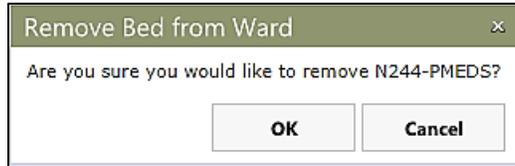


Figure 4-11: **Remove Bed from Ward** confirmation dialog

4.4 Room-Beds

Click **Room-Beds** in the selection pane of the Settings module to see the **Room-Beds** page. Figure 4-12 shows an example of the Settings module with the **Room-Beds** page displayed.

Name	Bed Phone	Out of Service	Description
100-1		<input type="checkbox"/>	NO DESCRIPTION
101-1		<input type="checkbox"/>	NO DESCRIPTION
101-2		<input type="checkbox"/>	NO DESCRIPTION
102-1		<input type="checkbox"/>	NO DESCRIPTION
102-2		<input type="checkbox"/>	NO DESCRIPTION
103-1		<input type="checkbox"/>	NO DESCRIPTION
103-2		<input type="checkbox"/>	NO DESCRIPTION
104-1		<input type="checkbox"/>	NO DESCRIPTION
104-2		<input type="checkbox"/>	NO DESCRIPTION
105-1		<input type="checkbox"/>	NO DESCRIPTION
105-2		<input type="checkbox"/>	NO DESCRIPTION
106-1		<input type="checkbox"/>	NO DESCRIPTION
106-2		<input type="checkbox"/>	NO DESCRIPTION
107-1		<input type="checkbox"/>	NO DESCRIPTION
107-2		<input type="checkbox"/>	NO DESCRIPTION
108-1		<input type="checkbox"/>	NO DESCRIPTION
108-2		<input type="checkbox"/>	NO DESCRIPTION
109-1		<input type="checkbox"/>	NO DESCRIPTION

Figure 4-12: **Room-Beds** page

Use the **Room-Beds** page of the Settings module to add or remove room-beds from those available in the BPRM suite and to set or modify details for each room-bed.

4.4.1 Filter and Sort the Room-Beds Page

Use the **Filter Room-Beds** text box to filter the **Room-Beds** listing. Type all (or the first few characters) of a room-bed name to show only the bed(s) matching that criteria in the listing.

Use the **Sort By** list box to sort the List View by Room-Bed Name or by Description.

4.5 Adding or Editing Room-Beds

Use the **Room-Beds** page to add a new room-bed to the RPMS database or to edit the details about an existing one. Click **Add** in the upper right corner of the page to add a room-bed, or select an existing room-bed and click **Edit** in the upper right corner of the page to edit the details about that room-bed. In either case, the **Room-Bed Configuration** page displays.

The examples shown in the following sections show a room-bed being edited on the **Room-Bed Configuration** page. When creating a new room-bed, the dialogs displayed are the same, although the fields on the dialog will be blank.

Click **Add** on the Room-Beds page to add a new room-bed, or select an existing room-bed and click **Edit** to change the details about that room-bed. In either case, a **Room-Bed Configuration** dialog similar to that shown in Figure 4-13 displays.

Room-Bed Configuration - 510-B		
Name [required]	Bed Phone	Description
510-B		ADULT MEDICAL
Wards Which Can Assign		
Ward Name	Specialty	Bed Section
INPATIENT		
Save Cancel		

Figure 4-13: **Room-Bed Configuration** dialog

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

The **Room-Bed Configuration** dialog also includes the **Wards Which Can Assign** section. This section lists the ward(s) which can use this specific room-bed.

To add a ward to the listing, click **Add** in the upper right of the **Wards Which Can Assign** section. The **Add Ward Which Can Assign** dialog shown in Figure 4-14 displays.

Figure 4-14: **Add Ward Which Can Assign** dialog

Type the first few characters of a ward name in the **Ward** search box then select the desired ward from the list displayed. When done, click **OK** to close the **Add Ward Which Can Assign** dialog and add the ward to the list, or click **Cancel** close the dialog without saving the changes.

When done entering the **Room-Bed Configuration** dialog information, click **Save** to save the information, or click **Cancel** to close the dialog without saving the information.

4.5.1 Room-Beds – Add Bulk Option

BPRM provides a way to add multiple new room-beds to the RPMS database. Click **Add Bulk** on the **Room-Beds** page of the Settings module to open the **Room-Bed Configuration** dialog shown in Figure 4-15.

Figure 4-15: **Room-Bed Configuration** dialog

The dialog includes the fields shown in Table 4-2.

Table 4-2: **Room-Bed Configuration** dialog fields

Field	Description
Prefix	The room-bed prefix (optional)
Starting Room Number	The starting room number of the range of room-beds to be added

Field	Description
Ending Room Number	The ending room number of the range of room-beds to be added
Suffix Values (E.g., A, B)	Suffix to be added to room numbers usually to designate the bed
Description	Use this list box to select a description for the available room-beds
Ward	Type the first few characters of a ward name in the Ward search box then select the desired ward from the list displayed.

When done entering the necessary information, click **Save** to add the specified range of room-beds, or click **Cancel** to close the dialog without adding the room-beds.

4.6 Site Parameters – ADT

Click **Site Parameters** in the selection pane of the Settings module to see the Site Parameters page, and then click **View** to the left of the **ADT Site Parameters** label to open the **ADT Site Parameters** dialog (Figure 4-16).

Figure 4-16: **ADT Site Parameters** dialog

4.6.1.1 Fields on the ADT Site Parameters Dialog

The dialog includes these fields. See the Glossary for additional definitions:

- **Census Lockout Days**
- **Minimum Age for Adult Patients**
- **Final A-Sheet Default**

- **Clinical Record Brief Format**
- **Days to Delinquency**
- **Admission Request Clinic**
- **Day Surgery Hospital Location**
- **Request Chart at Admission**
- **Use Locator Cards**
- **Incomplete Chart Entry at Discharge**
- **Bill Prep Tracked**
- **Admit After DS Bulletin**
- **Time Length for Admit DS**
- **Readmission Bulletin**
- **Time Length for Readmission**
- **Readmit within 24 Hrs Bulletin**
- **Transfer In Bulletin**
- **Admission < 24 Hrs Bulletin**
- **Admission Deleted Bulletin**
- **ICU Transfer Bulletin**
- **Return to ICU Bulletin**
- **Time Length for Return to ICU**
- **Transfer Out Bulletin**
- **AMA Discharge Bulletin**
- **Inpatient Death Bulletin**

When done entering the **ADT Site Parameters** dialog information, click **Save** to save the information, or click **Cancel** to close the dialog without saving the information.

5.0 ADT Reports

The Practice Management Application Suite includes the Reports module, which produces a variety of reports regarding practice management. This chapter describes the admission, discharge, and transfer reports available from the Reports module.

5.1 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 Taskbar (Figure 5-1) to open the Reports module.



Figure 5-1: Taskbar with **Reports** module Highlighted

5.2 Reports Toolbar

Regardless of the report type, the top of each report page includes the Reports Toolbar (Figure 5-2), which provides a variety of tools for handling and manipulating reports.

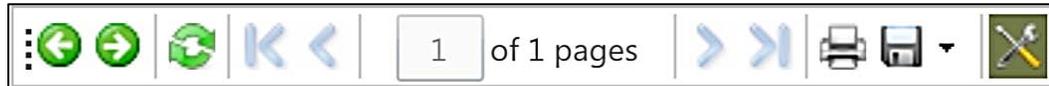


Figure 5-2: Reports Toolbar

5.2.1 Previous/Next Buttons

After having generated more than one report of a specific type, use the Previous/Next buttons (Figure 5-3) to “page” through each of the previously-viewed reports.



Figure 5-3: Previous/Next Buttons

5.2.2 Refresh Button

Use the Refresh button (Figure 5-4) to refresh a report.



Figure 5-4: Refresh Button

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

5.2.3 Page Selection Buttons

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

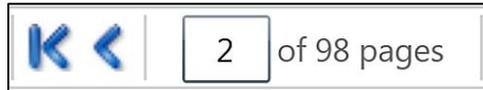


Figure 5-5: Page Selection Buttons

Type a specific page number into the text field to jump quickly to that page.

5.2.4 Print Button

Use the Print button (Figure 5-6) to print the currently-displayed report.



Figure 5-6: Print Button

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

5.2.5 Save Button

Click the Save button (Figure 5-7) to save the report in a variety of file formats.



Figure 5-7: Save Button

The following file formats are supported:

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

5.2.6 Show/Hide Parameters Button

Use the Show/Hide Parameters button (Figure 5-8) to alternately show or hide the report parameters panel at the top of the report page.



Figure 5-8: Show/Hide Parameters Button

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

5.3 ADT Report Types

When the Reports module is open, a listing of the available scheduling-related reports displays as shown in Figure 5-9.

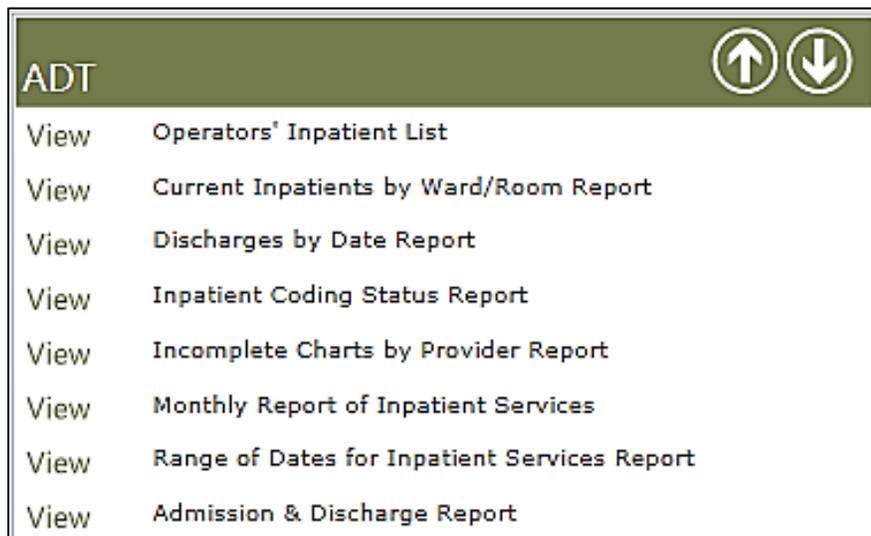


Figure 5-9: **ADT** Reports listing

Click View on the left of any of the report types to open that type of report. After opening a report, provide additional parameters (such as start and end dates) in order to view it.

5.4 Operators' Inpatient List

The **Operators' Inpatient List** shows selected patient data for each inpatient. Figure 5-10 shows an example of a typical Operators' Inpatient List.

Patient	Phone	Room	Ward	Sex	Age	Community
ABBEY,TRESSIA LYNN	3456	502-A	INPATIENT	F	35 YRS	CANTON
ABBOTT,CHARLES WOODROW		507-A	INPATIENT	M	79 YRS	UNKNOWN
ABBOTT,RAY MITCHELL			INPATIENT	M	40 YRS	NORTH CAROLINA UNK
ABBOTT,RODOLFO ALMANZA		N204-PMEDS	NORTH	M	65 YRS	PAINTTOWN
ABEE,CHASIDY SHA		E102-AMED	EAST	F	11 YRS	FLORIDA UNK
ABERNATHY,ALICE M		N208-PSURG	NORTH	F	21 YRS	BIG Y
ABERNATHY,ELIJAH THOMAS		W402-TB	WEST	M	10 YRS	BIRDTOWN
ADAIR,LUCINDA		W410-ALCH	WEST	F	90 YRS	OHIO UNK
ADAMCZYK,JUANITA		518-A	INPATIENT	F	13 YRS	SOCO
ADAMS,COLBY		E106-ASURG	EAST	M	29 YRS	GEORGIA UNK
ADAMS,DOROTHY		510-A	INPATIENT	F	26 YRS	TENNESSEE UNK
ALLEN,DEBORAH ASHLEY		E102-AMED	EAST	F	36 YRS	SOCO
ALLISON,DIANA VIRGINIA		E101-AMED	EAST	F	9 YRS	PAINTTOWN
ALVARADO,KALE ALEXANDER		510-A	INPATIENT	M	80 YRS	WOLFTOWN
ANDERSON,FRED		514-A	INPATIENT	M	30 YRS	BIRDTOWN
ARMSTRONG,RETTY		E107-ASURG	EAST	F	40 YRS	NORTH CAROLINA UNK

Figure 5-10: Operators' Inpatient List

5.5 Current Inpatients by Ward/Room Report

The **Current Inpatient by Ward/Room Report** lists all current inpatients for the selected ward(s).

5.5.1 Current Inpatients by Ward/Room Report Parameters

1. Open the **Current Inpatients by Ward/Room Report** dialog (Figure 5-11).

Figure 5-11: Current Inpatients by Ward/Room Report parameters

2. Select one or more wards from the **Ward(s)** list box.

3. Select either **Diagnosis** or **Service** from the **Select** box.
4. Optionally, select **Show Occupied Beds** to display only the occupied beds.
5. Click **Preview** to view the report (Figure 5-12).

5.5.2 Information on the Current Inpatients by Ward/Room Report

(Attending Provider)		Community			
EAST					
E101-AMED	NIERENHAUSEN,ALICIA ANNE USER,OSTUDENT	134663	16 YRS	BRYSON CITY	
E101-AMED	BLUE,BOBBY JAY JR ALEXIUS,L	778899	24 YRS	41 OCEANSIDE	FAMILY PRACTICE OBSERVATION
E102-AMED					
E103-AMED	PERSONIUS,PRIME HISTIA,AMANDA	45456	33 YRS	39 ALBUQUERQUE	GENERAL MEDICINE
E104-AMED	PINK,HOLLY ALEXIUS,L	885522	17 YRS	19	FAMILY PRACTICE OBSERVATION
E105-AMED					
E106-ASURG					

Figure 5-12: Current Inpatients by Ward/Room Report

The **Current Inpatients by Ward/Room Report** includes the following information for each patient in the selected ward(s):

- Room number
- Patient name
- HRN (Health Record Number)
- Patient age
- LOS (Length of Stay)
- Diagnosis (If selected)
- Service (If selected)
- Attending Provider
- Community

5.6 Discharges by Date Report

The **Discharges by Date Report** lists discharges for one or more wards over a specified time period.

5.6.1 Discharges by Date Report Parameters

1. Open the **Discharges by Date Report** dialog (Figure 5-13).

Figure 5-13: **Discharges by Date Report** parameters

2. Enter the **From** date and the **To** date.
3. Select one or more wards from the **Ward(s)** list box.
4. Click **Preview** to view the report (Figure 5-14).

5.6.2 Information on the Discharges by Date Report

Patient (Attending Provider)	HRN	Adm/Dsch Dates (Dx)	LOS	Service	Ward
BLUE WARD					
COYOTE, WILEY (Attending: HISTIA, AMANDA)	999014	03/20/2015 - 03/20/2015 (Dx: BMW ADMITOBS)	0	IMEDO	BLUE WARD
COYOTE, WILEY (Attending: HISTIA, AMANDA)	999014	03/20/2015 - 03/23/2015 (Dx: BMW READMIT)	3	GM	BLUE WARD

Figure 5-14: **Discharges by Date Report**

The **Discharges by Date Report** includes the following information for each patient matching the specified report parameters:

- Patient name
- HRN
- Admit and discharge dates
- LOS
- Service
- Ward
- Attending Provider
- Dx (Short Diagnosis)

5.7 Inpatient Coding Status Report

The **Inpatient Coding Status Report** lists the status of inpatient coding over a specified time period.

5.7.1 Inpatient Coding Status Report Parameters

1. Open the **Inpatient Coding Status Report** (Figure 5-15).

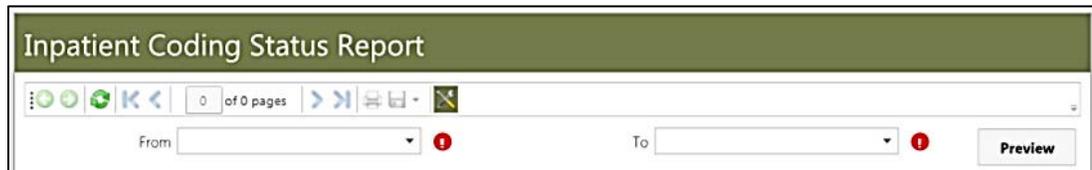
The screenshot shows a web application interface for the 'Inpatient Coding Status Report'. At the top, there is a green header bar with the title 'Inpatient Coding Status Report'. Below the header is a toolbar with various icons for navigation and actions. The main area contains two date input fields labeled 'From' and 'To', each with a red information icon to its right. A 'Preview' button is located to the right of the 'To' field. The 'From' field is currently empty, and the 'To' field is also empty.

Figure 5-15: **Inpatient Coding Status Report** parameters

2. Enter the **From** date and the **To** date.
3. Click **Preview** to view the report (Figure 5-16).

5.7.2 Information on the Inpatient Coding Status Report

Inpatient Coding Status Report Page 1

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From February 2015 To March 2015

From Feb 2015 through Mar 2015

Month/Year	# Disch	# Coded	# Not-Coded	# Exported	# Errors
Feb 2015	72	0	70	0	2
Mar 2015	18	0	17	0	1
Total:	90	0	87	0	3

*** UNCODED CLINICAL RECORD BRIEFS ***

Admit & Discharge Dates	Patient Name	Chart #	Service	Insurance
02/02/2015 02/02/2015	TREET, RON	295165	GM	IHS
07/17/2014 02/03/2015	ANDERSON, MICHAEL E	115386	GM	MCD
02/02/2015 02/03/2015	ARGUMEDO, JONATHAN	109898	GM	PVT
07/17/2014 02/03/2015	CARDINAL, CHERYL	105482	GM	MCD

91 %

Close

Figure 5-16: **Inpatient Coding Status Report** – first page

The Inpatient Coding Status Report includes the following information:

- Month/Year
- Number of Discharges
- Number Coded
- Number Not Coded
- Number Exported
- Number of Errors

The report also lists:

- Admit and Discharge dates
- Patient Name
- Chart number
- Service
- Insurance

At the bottom of the report is a list of errors with the following information:

- Discharge Date

- Patient Name
- Chart #
- Error Message

Figure 5-17 shows the second and subsequent pages of a typical **Inpatient Coding Status Report**.

The screenshot displays the 'Inpatient Coding Status Report' interface. At the top, the title 'Inpatient Coding Status Report' is shown. Below the title is a navigation bar with icons for back, forward, and search. The report parameters are set to 'From February 2015' and 'To March 2015', with a 'Preview' button to the right. The main content area shows a table with the following data:

Discharge Date	Patient Name	Chart #	Error Message
02/04/2015	PERALTO, MAURICE MARTIN	145840	No V Hospitalization for Visit
02/06/2015	PABLO, ASHLEY	146459	No V Hospitalization for Visit
03/18/2015	DRAGON, BLUE	999045	No V Hospitalization for Visit

At the bottom of the report area, there is a zoom level of 91% and a 'Close' button.

Figure 5-17: **Inpatient Coding Status Report** – subsequent pages

5.8 Incomplete Charts by Provider Report

The **Incomplete Charts by Provider Report** shows information about incomplete charts for each selected provider.

5.8.1 Incomplete Charts by Provider Report Parameters

1. Open the **Incomplete Charts by Provider Report** page.
2. Select one or more provider names from the **Provider** list box.
3. Click **Preview** to view the report (Figure 5-18).

5.8.2 Information on the Incomplete Charts by Provider Report

Incomplete Charts by Provider Report Page 1

Inpatients, Observations & Day Surgeries

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Patient	HRN	Date	Type	Deficiencies	Days
Incomplete Charts for FORM,JILL P					
DEMO,ASHLEY	114648	03/20/2015	OBS	A SHEET	
COYOTE,WILEY	999013	03/23/2015	INP	A SHEET	2
FRED,URSULA ANN	113741	03/23/2015	INP	A SHEET	2
				PROGRESS NOTES	2

Total Delinquent Charts: 0
 Total Incomplete Charts: 3
 Incomplete/Delinquent for Signature: 1
 Discharge Summary: 0
 Operative Report: 0
 A Sheet 3

100 %

Close

Figure 5-18: Incomplete Charts by Provider Report

5.9 Monthly Report of Inpatient Services

The **Monthly Report of Inpatient Services** shows a variety of census totals for reporting purposes. The totals can be gathered for inpatient services provided for a specific month.

5.9.1 Monthly Report of Inpatient Services Parameters

1. Open the **Monthly Report for Inpatient Services** page (Figure 5-19).

Monthly Report of Inpatient Services

0 of 0 pages

Month

Preview

Figure 5-19: Monthly Report of Inpatient Services parameters

2. Select the month from the **Month** list box.
3. Click **Preview** to view the report (Figure 5-20).

5.9.2 Information on the Monthly Report of Inpatient Services

The **Monthly Report of Inpatient Services** includes the following information:

- Part I – Service and Census:
 - Medical Services Provided
 - BOM (Beginning of Month) Census
 - Admissions
 - Discharges due to Death
 - Discharges – other
 - EOM (End of Month) Census
 - Inpatient Days
- Part II – Special Information:
 - Peak Census, Excluding Newborns
 - Minimum Census, Excluding Newborns
- Part III – Beds Available and Comments

Monthly Report of Inpatient Services						
DEMO HOSPITAL Monthly Report of Inpatient Services Oct 2013 Page 1						
Part I - Service and Census						
Medical Services Provided	BOM Census	Adm	Discharges Death	Discharges Other	EOM Census	Inpatient Days
MEDICAL & SURGICAL (Adult)	5	3	0	0	8	189
MEDICAL & SURGICAL (Ped.)	2	1	0	0	2	62
OBSTETRIC	0	0	0	0	0	0
TUBERCULOSIS	0	0	0	0	0	0
ALCOHOLISM/SUBSTANCE ABUSE	0	0	0	0	0	0
MENTAL HEALTH	0	0	0	0	0	0
Total:	7	4	0	0	10	251
NEWBORN	0	0	0	0	0	0
SWING BEDS	0	0	0	0	0	0
OBSERVATIONS	4	1	0	1	4	124
DAY SURGERY	0	0	0	0	0	0
Part II - Special Information						
Peak Census, Excluding Newborn						14
Minimum Census, Excluding Newborn						11
Part III						
Beds Available			Comments			
Staff Units	# of Beds	% Occup.	ALOS:			
MEDICAL (Adult)	38			ADULT MED/SUR :	189.00	
SURGICAL (Adult)	5			PEDS MED/SUR :	62.00	
Subtotal	43	14%		NEWBORN :	0.00	
MEDICAL (Pediatric)	10		ADPL:	ADULT MED/SUR :	6.10	
SURGICAL (Pediatric)	15			PEDS MED/SUR :	2.00	
Subtotal	25	8%		NEWBORN :	0.00	
OBSTETRIC	9	0%		1 DAY PAT ADULT M/S :	0	
TUBERCULOSIS	5	0%		PEDS M/S :	0	
ALCOHOL/SUBSTANCE ABUSE	7	0%		NEWBORN :	0	
MENTAL HEALTH	5	0%		ICU/SCU PATIENT DAYS :	0	
ICU/SCU	0			PCU PATIENT DAYS :	0	
PCU	0			NON-BENEFICIARIES :		
Total:	94			# Discharged :	0	
NEWBORN	5	0%		With total LOS of	0 days	
				% OF OCCUPANCY :	9%	

Figure 5-20: Monthly Report of Inpatient Services

5.10 Range of Dates for Inpatient Services Report

The **Range of Dates for Inpatient Services Report** shows various census totals for reporting purposes. The totals can be run for inpatient services provided over a specified range of dates.

5.10.1 Range of Dates for Inpatient Services Report Parameters

1. Open the **Range of Dates for Inpatient Services Report** page (Figure 5-21).



Figure 5-21: **Range of Dates for Inpatient Services Report** parameters

2. Enter the **From** date and the **To** date.
3. Click **Preview** to view the report (Figure 5-22).

5.10.2 Information on the Range of Dates for Inpatient Services Report

The Range of Dates for Inpatient Services Report includes the following information:

- Part I – Service and Census:
 - BOM (Beginning of Month) Census
 - Admissions
 - Discharges due to Death
 - Discharges – other
 - EOM (End of Month) Census
 - Inpatient Days
- Part II – Special Information:
 - Peak Census, Excluding Newborns
 - Minimum Census, Excluding Newborns
- Part III – Beds Available and Comments

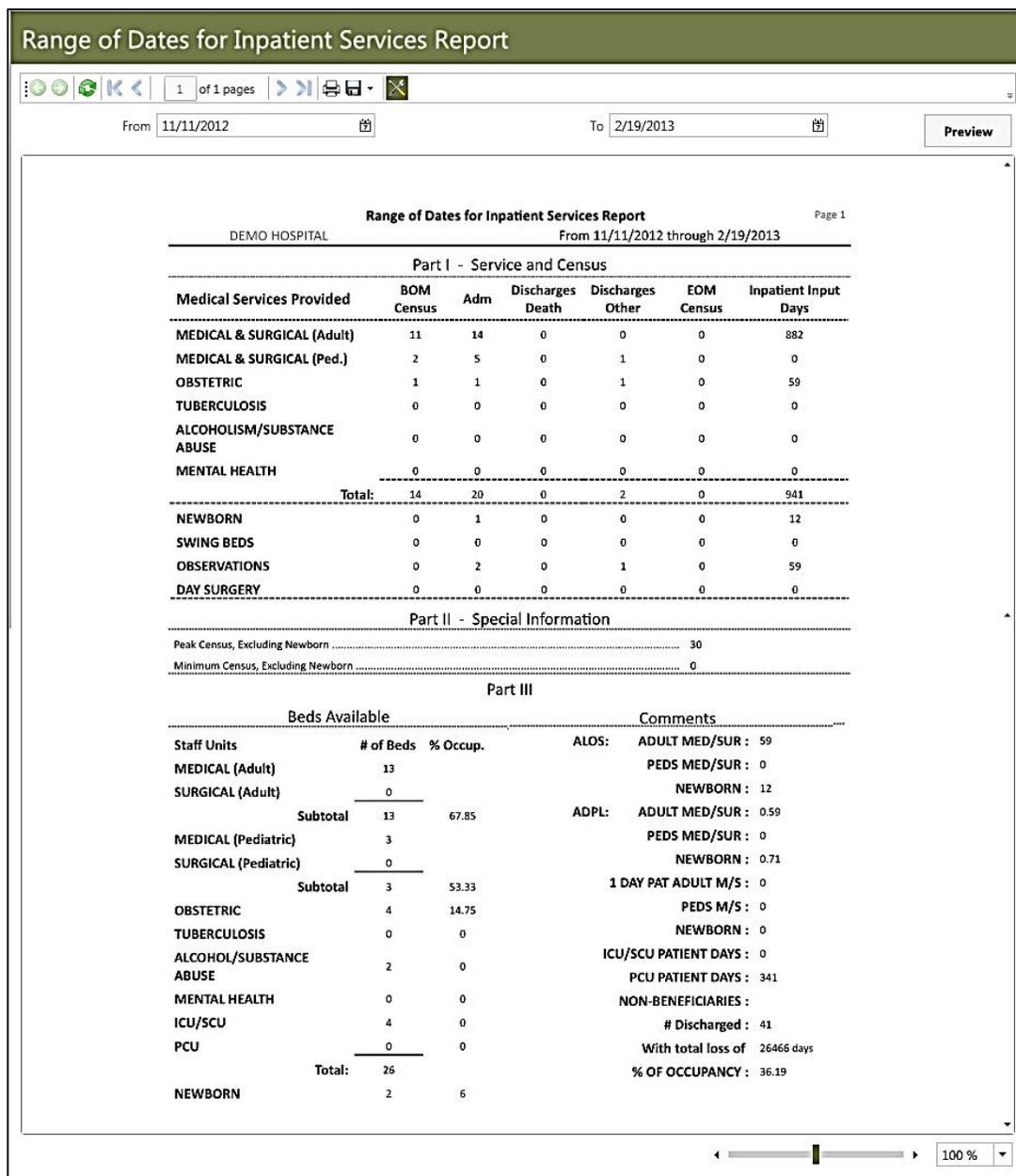


Figure 5-22: Range of Dates for Inpatient Services Report

5.11 Admission & Discharge Report

The **Admission & Discharge Report** shows statistical data relating to admissions and discharges at a facility.

5.11.1 Admission & Discharge Report Parameters

1. Open the **Admission & Discharge Report** page (Figure 5-23).

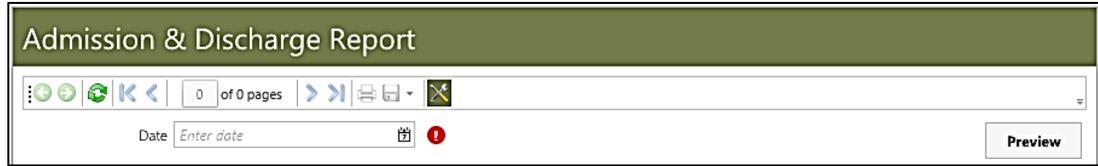


Figure 5-23: **Admission & Discharge Report** parameters

2. Enter the date of the report in the **Date** field.
3. Click **Preview** to view the report (Figure 5-24).

5.11.2 Information on the Admission & Discharge Report

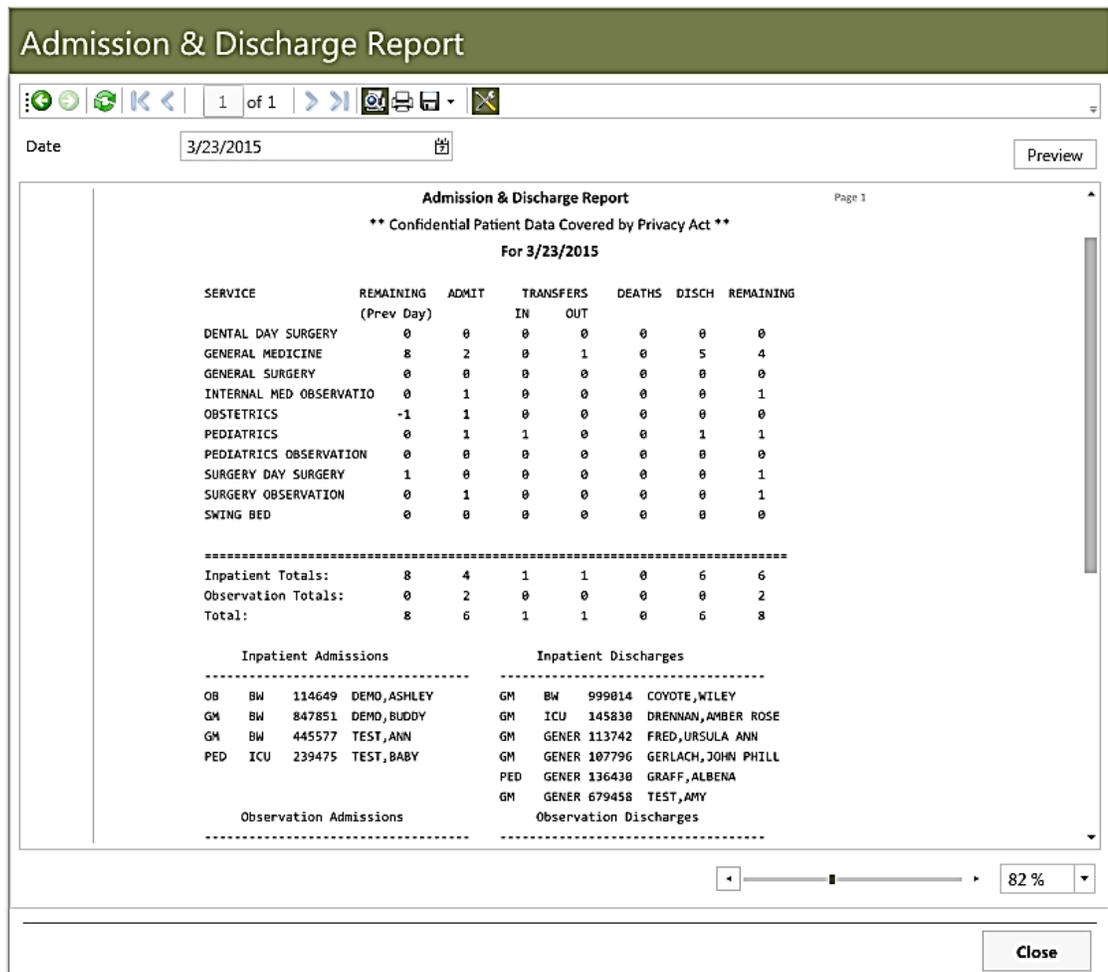


Figure 5-24: **Admission & Discharge Report**

The **Admission & Discharge Report** displays the number of patients in each of these categories, subdivided by service:

- Previous Day

- Admitted
- Transferred Out
- Transferred In
- Deaths
- Discharged
- Remaining

It also shows:

- Inpatient Admissions and Discharges
- Observation Admissions and Discharges
- Newborn Admissions and Discharges
- Ward Transfers
- Service Transfers

5.12 A-Sheet Report

The **A-Sheet Report** (Figure 5-25) is accessible from:

- The Ward Workspace as described in Section 3.3.1
- The **Admissions** tab under the **ADT** tab in the Patients module

Print A-Sheet

1 of 1

Page 1

CLINICAL RECORD BRIEF ****Confidential Patient Data Covered by Privacy Act****

1 IHS Unit No.	2 Soc Sec No	10 Classif.	11 Facility	12 Facility Code
44-55-77	222-66-7788	INDIAN/ALAS	2013 DEMO HO	232101

3 Last Name, First, Middle	13 Age	14 Religion	15 Hr Admit	16 Admit Code
TEST,ANN	5		1446	1 DIRECT

4 Birthdate	5 Sex	6 Tribe	17&18 Admit Svc & Code	19 Admit Date
06/08/2009	F	NAV084	GM 03	MAR 23, 2015

8 Community Code	Admtg Ward	Admtg Provider	20 Discharge Date
434-17-35	BLUE WARD	FORM,JILL P	MAR 24, 2015

9 Present Address	22 Length of Stay
WYTEYWT ABQ, NE 87111	1 days

23 Next of Kin	Telephone	Address	Relationship
24 Person to Notify	YEL,UETRE	8881122233	ADOPTED DAUGH

25 Admitting Diagnosis	Insurance Coverage
HEAD INJURY	

26 ICD	27 POA	28 Established DX
--------	--------	-------------------

◀
◀
▶
 80 % ▼

Close

Figure 5-25: A-Sheet Report

6.0 ADT Changes to the Patients Module

Depending on the access keys and roles assigned at a facility, several ADT features may also become visible within the Patients module. This chapter describes those additions.

6.1 ADT Tab

When the ADT module is accessible to users, the ADT tab (Figure 6-1) is visible within the Patients module.



Figure 6-1: **ADT** tab in the **Patients** module

When the ADT tab is selected, the Admissions tab and the Incomplete Charts tab are displayed. These tabs are described in Sections 6.1.1 and 6.1.2.

6.1.1 Admissions Tab

Select the **Admissions** tab to see a list view of admissions for the selected patient (Figure 6-2).

TEST,ANN SSN XXX-XX-7788 Eligibility Status DIRECT ONLY View RHI NO
 06/08/2009 (5y 9m) FEMALE HRN 445577 Active Insurance Sensitive NO
 Last Updated 3/16/2015 (F) PCP Veteran NO

ADT Print

TEST,ANN
 XXX-XX-7788 445577
 06/08/2009 FEMALE

Admissions Incomplete Charts

Sort By Admission Date

Admission Date	Room-Bed	Ward	Specialty	Attending	Admitted By	Discharge Date
03/23/2015 02:46 PM	121-B	BLUE WARD	GENERAL MEDICINE	FORM,JILL P	FORM,JILL P	03/24/2015 01:29 PM
03/13/2015 02:13 PM	104-1	GENERAL	GENERAL MEDICINE	HISTIA,AMANDA	HISTIA,AMANDA	03/16/2015 04:09 PM
03/13/2015 01:50 PM	122-A	BLUE WARD	INTERNAL MED OBSERVATION	HISTIA,AMANDA	HISTIA,AMANDA	03/13/2015 02:11 PM
10/08/2014 12:29 PM		GENERAL	GENERAL MEDICINE	ST CYR,DONNA	ST CYR,DONNA	01/30/2015 03:03 PM
01/06/2014 12:52 PM		GENERAL	GENERAL MEDICINE	FORM,JACK P	FORM,JACK P	01/06/2014 03:03 PM

Page 1

Patients ADT Settings Reports Tasks 0

Figure 6-2: **Admissions** tab

The **Admissions** tab listing includes the following information for each admission (when available):

- Admission Date

- Room-Bed
- Ward
- Specialty
- Attending
- Admitted By
- Discharge Date

6.1.1.1 Admissions Tab Context Menu

Right-click any of the entries in the **Admissions** tab to open a context menu offering these options:

Table 6-1: Admissions Tab Context Menu

Option	Description
View Admission Detail	Select this option to view details about the patient's admission. Selecting this option opens the Inpatient Admission Detail dialog described in Section 3.7.1.
Print A-Sheet	Select this option to print an A-Sheet for this patient. See Section 5.12 for more information about the A-Sheet.

6.1.2 Incomplete Charts Tab

Select the **Incomplete Charts** tab to see a list view of incomplete charts for the selected patient (Figure 6-3).

DEMO, ALICE JANENE SSN XXX-XX-0084 Eligibility Status CHS & DIRECT RHI NO
 11/30/1952 (60y) FEMALE HRN 109629 Active Insurance NO Sensitive NO
 Last Updated 9/24/2013 (A) PCP Veteran

Profile Benefits Appointments **ADT** Record Flags Errors 4 Warnings 4 Print Facesheet

Admissions **Incomplete Charts**

Sort By Date

Progress	Discharge Date	Insurance Coverage	Category	Discharge Ward	Service
+ 0 of 0	09/09/2013	MCR/PVT	HOSPITALIZATION	INPATIENT	GENERAL MEDICINE
+ 0 of 0	01/22/2008	PVT	HOSPITALIZATION	INPATIENT	GENERAL MEDICINE

Page 1

Figure 6-3: **Incomplete Charts** tab

The **Incomplete Charts** tab listing includes the following information for each incomplete chart (when available):

- **Progress**

- **Discharge Date**
- **Insurance Coverage**
- **Category**
- **Discharge Ward**
- **Service**

Click the plus sign (+) to the left of any of the listed charts to expand the information shown (if available). These additional fields are displayed for expanded individual records:

- **Provider**
- **Chart Deficiency**
- **Status**
- **Date Resolved**
- **Comments** (free text area for comments)

6.1.2.1 Incomplete Charts Tab Context Menu

Right-click any of the entries in the **Admissions** tab to open a context menu offering this option:

Table 6-2: Incomplete Charts Tab Context Menu

Option	Description
View Incomplete Chart Detail	Select this option to view details about any incomplete charts associated with the selected patient. Selecting this option opens the Incomplete Chart Detail page described in Section 3.5.3.

Appendix A: ADT User Role Access

	ADT Clerk Role	ADT Coder Role	ADT Non-Clinical Role	ADT Supervisor Role
Patients Module	Yes; Admissions only	Yes; Admissions and Incomplete Charts	No	Yes; Admissions and Incomplete Charts
A&D Dashboard	Yes	Yes	No	Yes
Ward Workspace	Yes	Yes; View Admission detail, Print A- sheet Only, Select Patient in EHR only	No	Yes
List View	Yes	Yes; View Admission Detail & Print A- sheet Only	No	Yes
Incomplete Charts	No	Yes	No	Yes
Discharge List	Yes; View Admission Detail & Print A- sheet only	Yes; View Admission Detail & Print A- sheet only	No	Yes
Settings	No	No	No	Yes
Reports	<ul style="list-style-type: none"> • Operators' Inpatient List • Current Inpatient by Ward/Room Report 	<ul style="list-style-type: none"> • Operators' Inpatient List • Current Inpatient by Ward/Room Report • Discharges by Date Report • Inpatient Coding Status Report • Incomplete charts by Provider reports 	<ul style="list-style-type: none"> • Operators' Inpatient List • Current Inpatient by Ward/Room Report 	All reports

Appendix B: 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: <http://security.ihs.gov/>.

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

B.1 All RPMS Users

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

B.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.

B.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.

B.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.

B.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.

B.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.

B.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).

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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.

B.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

Active

Status as pertaining to the patient's admission, medical record and/or insurance.

Admission Date

Date and time of admission for patient

Admission Deleted Bulletin

Triggers a bulletin whenever an admission is deleted. This alerts those in charge of the census files that an error has been fixed and census files may need updating.

Admission 24 Hrs Bulletin

Triggers a bulletin if the length of stay is less than 24 hours.

Admission Source – UB04

Admission source that best describes the origin of the patient's admission to the hospital.

Admission Type – UB04

Admission type indicating the manner in which the patient was admitted to the health care facility.

Admit After DS Bulletin

Triggers a bulletin for all admissions that occur within a specified number of days after a day surgery.

Admitting Provider

Physician who wrote admission order.

AMA Discharge Bulletin

Triggers a bulletin on any AMA (against medical advice) discharges.

Approved By

Name of the physician who approved any medical subject material pertaining to patient.

Assignment Narrative

Information recorded to the patient's medical record that reflects that patient's treatment or any information pertinent to the patients' medical record.

Attending Physician

Physician responsible for care.

Category 1 (National Flag)

A nationally recognized flag assigned to patients who present an immediate safety risk for seriously disruptive, threatening, or violent behavior.

Census Lockout Days

Controls the number of days before census files are locked. This prevents entering or changing admissions, transfers or discharges past the specified number of days.

Condition

Condition of patient whether it be “Seriously Ill” or “Do Not Resuscitate.”

Diagnosis (Short)

Short description of the admitting diagnosis.

Exclude from Directory

Denotes whether or not the patient wished to be excluded from the Facility Directory for this admission.

Facility Treating Specialty

Describes the care the patient is receiving.

Flag Name

Name of the flag being assigned to that patient pertaining to the patient's nature/behavior/symptom(s).

ICU Transfer Bulletin

Triggers a bulletin on all transfers to an ICU.

Inpatient Death Bulletin

Triggers a bulletin on all inpatient deaths.

Readmission Bulletin

Triggers a bulletin on any readmission that occurs within a specified number of days from discharge. The specified number is controlled via the **Time Length for Readmission** field in the ADT Site Parameters.

Readmit within 24 Hrs Bulletin

Triggers a bulletin on any readmission that occurs within 24 hours of discharge.

Referring Provider

Name of the provider who referred the patient for admission.

Return to ICU Bulletin

Triggers a bulletin when patients are returned to the ICU within a specified time frame. The time frame is controlled via the **Time Length for Return to ICU** field in the ADT Site Parameters.

Review Date

Date on which the patient's file was reviewed by the approved physician.

Room-Bed

All active beds according to ward location.

Transfer In Bulletin

Triggers a bulletin to be sent to the designated mail group upon all transfers from other facilities. This mail group is established within MailMan. Refer to the MailMan user documentation for additional information about mail groups.

Transfer Out Bulletin

Triggers a bulletin upon any discharges to other inpatient facilities.

Type of Admission

Reason for the admission.

Ward Location

The ward to which the patient is being admitted or transferred to.

Acronym List

Acronym	Definition
ADT	Admission, Discharge, and Transfer
AMA	Against Medical Advice
GUI	Graphical User Interface
ICU	Intensive Care Unit
IHS	Indian Health Service
RPMS	Resource and Patient Management System

Contact Information

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

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

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

Email: support@ihs.gov