



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 ADT 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 Admission/Discharge/Transfer (ADT) Module

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

### 2.1 ADT Toolbar

The **ADT toolbar** (Figure 2-1) at the top of the ADT module 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 2-1: ADT Toolbar Controls (left side)

The right side of the toolbar also includes bed statuses (Figure 2-2). This area is view only and the colors indicate the status of the bed.



Figure 2-2: ADT Toolbar Color-Coded Bed Statuses (right side)

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

The toolbar includes seven controls:

- **Ward Workspace.** Click to show bed occupancy information broken down into individual wards. Refer to Section 2.2 for more information.
- **List View.** Click to show a listing of all active patient admissions. The listing can be sorted in a variety of ways. Refer to Section 2.3 for more information.
- **Incomplete Charts.** Click to display or edit detailed information about any incomplete patient charts. Refer to Section 2.4 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 ways. Refer to Section 2.5 for more information.
- **Admit.** Click to admit a patient. Refer to Section 2.6 for more information about admitting a patient.
- **Transfer.** Click to transfer a patient. Refer to Section 2.9 for more information about transferring a patient.

- **Discharge.** Click to discharge a patient. Refer to Section 2.10 for more information about discharging a patient.

## 2.2 Ward Workspace

Click **Ward Workspace** button on the **ADT Toolbar** to manage bed occupancy, admission details, and bed status on a per-ward basis. Figure 2-3 shows an example of a typical **Ward Workspace**.

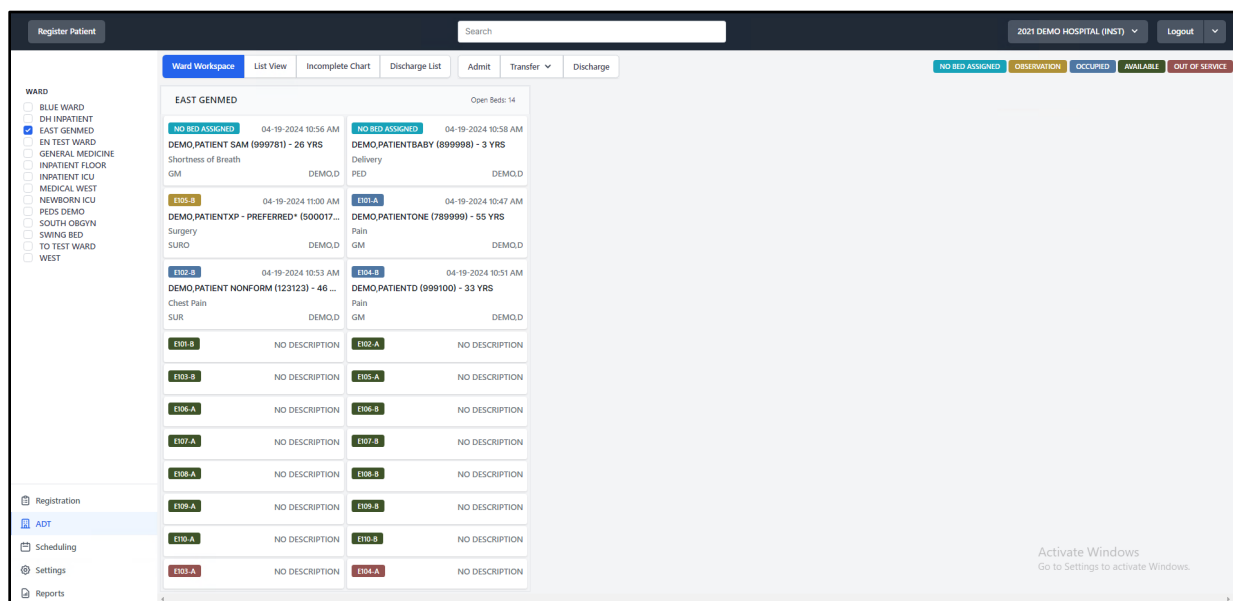


Figure 2-3: Typical Ward Workspace window

The **Wards** section on the left side of the Ward workspace 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. Refer to Section 3.4 for more information about adding or editing wards.

The **Ward** workspace displays the **Bed Status** in the top-right corner:

- No Bed Assigned
- Observation
- Occupied
- Available
- Out of Service

The User will be able to filter display (ON/OFF) as needed with the Bed Status buttons. Sort is by the order of the Bed Status and secondary sort is by bed# ascending. Each bed in a ward is represented in the **Ward** workspace with a bed tile. Figure 2-4 shows an example of a typical bed tile.

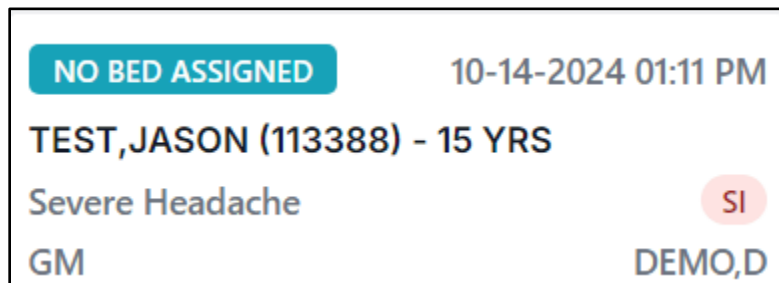


Figure 2-4: Bed Tile example

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
- Age
- Diagnosis (short)
- Attending physician
- Treating specialty
- Do Not Resuscitate (DNR) and/or Seriously Ill (SI) status
- Comments: A short display of comments will display on the tile. If there is more, an ellipsis will display to indicate additional comments are available. A hover is available to see up to ~200 characters. Comments more than 200 characters must be viewed by selecting View Admission Detail.

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 2-5 shows an example of a multi-ward bed tile that is occupied in another ward.

|                                                 |                     |
|-------------------------------------------------|---------------------|
| <b>MULTI-WARD BED</b>                           | 10-14-2024 01:27 PM |
| <b>DEMO,ADULT A (76907) - 54 YRS</b>            |                     |
| Shortness of breath                             |                     |
| EDO                                             | DEMO,D              |
| Patient arrived with difficulty breathing. P... |                     |

Figure 2-5: Bed Tile with Additional Comments

|                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Patient arrived with difficulty breathing. Patient was rushed to the bed nearest the Nurses station. Patient has history of asthma and other breathing difficulties. Patient was given a steroid inhaler which seemed... |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 2-6: Comments displayed in hover

| Inpatient Admission Detail          |                                                                                                                                                                                                                                                                              |                              |                                          | Edit |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------------------------------|------|
| Admission                           | Admission Date<br>10-14-2024 01:27 PM                                                                                                                                                                                                                                        | Exclude from Directory<br>NO | Admission Type-UB-04<br>EMERGENCY        |      |
|                                     | Admission Source-UB-04<br>INFORMATION NOT AVAILABLE                                                                                                                                                                                                                          | Admission Type<br>DIRECT     | Transfer Facility                        |      |
|                                     | Ward Location<br>GENERAL MEDICINE                                                                                                                                                                                                                                            | Room-Bed<br>MULTI-WARD BED   | Diagnosis (Short)<br>Shortness of breath |      |
|                                     | Facility Treating Specialty<br>ED BOARDER OBSERVATION                                                                                                                                                                                                                        | Referring Provider           | Admitting Provider<br>DEMO, PROVIDER MN  |      |
| Attending Physician<br>DEMO, DOCTOR | Comments<br>Patient arrived with difficulty breathing. Patient was rushed to the bed nearest the Nurses station. Patient has history of asthma and other breathing difficulties. Patient was given a steroid inhaler which seemed to relieve the immediate breathing issues. |                              |                                          |      |

Figure 2-7: Full comments displayed in View Admission Detail

Also, a bed tile will exclude the patient's name if the **Exclude from Directory** option is set when admitting the patient. Figure 2-6 shows an example of a bed tile that is excluded from the directory. If the patient should be added back to the directory, the user can clear the option in **View Admission Details**.

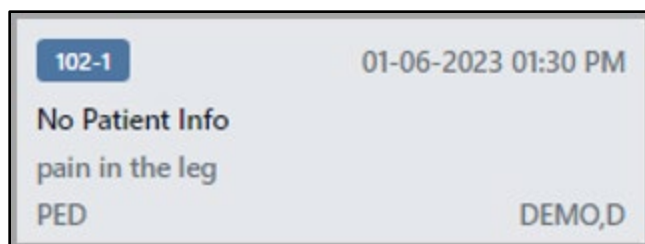


Figure 2-8: Exclude from Directory Tile example

## 2.2.1 Occupied Bed Context Menu

Right-click any of the bed tiles representing an occupied bed (including those for patients who have been admitted for observation) in the **Ward** workspace window to access the options shown in Table 2-1.

Table 2-1: Options on the Occupied Bed context menu

| Option                      |                                                                                                                                                                 |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transfer Ward               | Select this option to open the Ward Transfer dialog described in Section 2.9.1.                                                                                 |
| Transfer Bed                | Select this option to open the Bed Transfer dialog described in Section 2.9.3.                                                                                  |
| Transfer Provider           | Select this option to open the Provider Transfer dialog described in Section 2.9.4.                                                                             |
| Transfer Treating Specialty | Select this option to open the Treating Specialty Transfer dialog described in Section 2.9.2.                                                                   |
| Cancel Admission            | Select this option to cancel an admission.                                                                                                                      |
| Discharge Patient           | Select this option to open the Discharge Patient dialog described in Section 2.10.                                                                              |
| 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 2.6.1. |
| 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.                                                                  |
| Print A-Sheet               | Select this option to print an A-Sheet for the patient assigned to the selected bed described in Section 2.7.                                                   |
| Print Wrist Band            | Select this option to print a Wrist Band for the patient described in Section 2.8.                                                                              |

| Option                | Description                                                                                                                                                                   |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Patient in EHR | Select this option to open the patient's record in the Electronic Health Record (EHR) application. EHR must have a session running for the same user in order to run options. |

## 2.2.2 Available Bed Context Menu

Right-click any of the **bed tiles** representing an available bed in the **Ward** workspace window to access the options shown in Table 2-2.

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

| Option         | Description                                                                             |
|----------------|-----------------------------------------------------------------------------------------|
| Admit Patient  | Select this option to open the Admit Patient dialog described in Section 2.6.           |
| Inactivate Bed | Select this option to open the Inactivate Room-Bed dialog described in Section 2.2.2.1. |

### 2.2.2.1 Inactivate Bed

Right click **Inactivate Bed** in the context menu of an available bed to inactivate the bed. Figure 2-7 shows an example of a typical **Inactivate Room-Bed** dialog.

The screenshot shows a dialog box titled "Inactivate Room-Bed: S101-1". Inside, there are two fields marked as "[required]". The first field is "Out Of Service Date" with a text input showing "L-\_-\_" and a calendar icon. The second field is "Reason" with a dropdown menu currently displaying "Please Select". At the bottom of the dialog, there are two buttons: "Discard" and "Save".

Figure 2-9: Inactive Room-Bed dialog

The dialog includes two fields:

- Out of Service Date
- Reason

## 2.2.3 Out of Service Bed Context Menu

Right-click any of the bed tiles representing an **Out of Service** bed to access this option (Table 2-3).

Table 2-3: Options on the Out of Service Bed context menu

| Option         | Description                                                                             |
|----------------|-----------------------------------------------------------------------------------------|
| Reactivate Bed | Select this option to open the Reactivate Room-Bed dialog described in Section 2.2.3.1. |

### 2.2.3.1 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 2-8 shows an example of a typical **Reactivate Bed** dialog.

Reactivate Room-Bed: CW-7

Out Of Service Date [required] Reason [required] Expected Return To Service

09-26-2022 OTHER REASONS 10-06-2022

Discard Save

Figure 2-10: Reactivate Bed dialog

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

- Out of Service Date
- Reason
- Expected Return to Service

The bed becomes available after the date entered for **Expected Return to Service** has passed.

**Note:** To reactivate a bed to be used today, yesterday's date must be entered.

## 2.3 List View

Click **List View** button on the **ADT Toolbar** to see a list view of all admitted patients. Figure 2-11 shows an example of a typical **List View** window.

|                |           |                  |                |       |            |           |
|----------------|-----------|------------------|----------------|-------|------------|-----------|
| Ward Workspace | List View | Incomplete Chart | Discharge List | Admit | Transfer ▼ | Discharge |
|----------------|-----------|------------------|----------------|-------|------------|-----------|

| Admission List                              |                       |                  |                |             |                        |                |           |
|---------------------------------------------|-----------------------|------------------|----------------|-------------|------------------------|----------------|-----------|
| PATIENT                                     | ADMISSION DATE        | WARD             | ROOM-BED       | ATTENDING   | SERVICE                | LENGTH OF STAY | INSURANCE |
| DEMO,FERN<br>01-01-1960 - 142601            | 10/17/2024 9:57:00 AM | INPATIENT ICU    |                | DEMO.DOCTOR | GENERAL MEDICINE       | 1              | PVT       |
| TEST,PATIENTONE<br>05-01-1970 - 811401      | 10/17/2024 9:51:00 AM | WEST             |                | DEMO.DOCTOR | GENERAL SURGERY        | 1              | IHS       |
| TEST,JASON<br>04-01-2009 - 113388           | 10/15/2024 8:56:00 AM | WEST             | W403-D         | DEMO.DOCTOR | GENERAL SURGERY        | 2              | IHS       |
| DEMO,ADULT A<br>01-01-1970 - 76907          | 10/14/2024 1:27:00 PM | GENERAL MEDICINE | MULTI-WARD BED | DEMO.DOCTOR | ED BOARDER OBSERVATION | 3              | IHS       |
| DEMO,PATIENT NONFORM<br>02-01-1978 - 123123 | 10/14/2024 1:09:00 PM | WEST             |                | DEMO.DOCTOR | GENERAL MEDICINE       | 3              | IHS       |
| DEMO,ANGELA - ANGIE*<br>01-01-2000 - 223344 | 10/14/2024 9:23:00 AM | EAST GENMED      | E108-B         | DEMO.DOCTOR | GENERAL MEDICINE       | 3              | MCR/MCD   |

Showing 1 to 10 of 33 results

< 1 2 3 4 >

Figure 2-11: Typical List View window

### 2.3.1 List View Fields

This **List View** includes these fields:

- Patient (name) with Date of Birth and HRN
- Admission Date with time of admission
- Ward
- Room-Bed (current bed the patient is in)
- Attending (provider)
- Service (facility treating specialty)
- Length of Stay (in days)
- Insurance
- Seriously Ill (SI) and/or Do Not Resuscitate (DNR) indicator shows next to Patient Name if available

### 2.3.2 Filtering the List View

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

### 2.3.2.1 Ward Filter

Use the **Ward** list to filter the **List View** by ward. The wards shown in the list box are controlled via the **Wards** option in the **Settings** module, as described in Section 3.4.

### 2.3.2.2 Patient Condition

Use **Patient's Condition to Filter by Seriously Ill (SI) or Do not Resuscitate (DNR)**.

- All
- Seriously Ill (SI)
- DNR (Do Not Resuscitate)

### 2.3.2.3 Sort By

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

- Patient Name
- Ward Name
- Admission Date Asc (ascending)
- Admission Date Dsc (descending)
- Length of Stay Asc (ascending)
- Length of Stay Dsc (descending)

## 2.3.3 List View Context Menu

Right-click any of the entries (Table 2-4) in the **List View** to display a context menu offering these actions:

Table 2-4: Options on the List View context menu

| Option                      | Description                                                                                   |
|-----------------------------|-----------------------------------------------------------------------------------------------|
| Transfer Ward               | Select this option to open the Ward Transfer dialog described in Section 2.9.1.               |
| Transfer Bed                | Select this option to open the Section 2.9.3 dialog.                                          |
| Transfer Provider           | Select this option to open the Provider Transfer dialog described in Section 2.9.4.           |
| Transfer Treating Specialty | Select this option to open the Treating Specialty Transfer dialog described in Section 2.9.2. |

| Option                | Description                                                                                                                                                                   |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Cancel Admission      | Select this option to cancel an admission.                                                                                                                                    |
| Discharge Patient     | Select this option to open the Discharge Patient dialog described in Section 2.10.                                                                                            |
| 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 2.6.1.               |
| 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.                                                                                |
| Print A-Sheet         | Select this option to print an A-Sheet for the patient assigned to the selected bed described in Section 2.7.                                                                 |
| Print Wrist Band      | Select this option to print a wrist band for the patient described in Section 2.8.                                                                                            |
| Select Patient in EHR | Select this option to open the patient's record in the Electronic Health Record (EHR) application. EHR must have a session running for the same user in order to run options. |

### 2.3.4 Create and Export List View Admissions to Excel

Click the Export icon (on the far right) to create and export the admission entries to an Excel file.

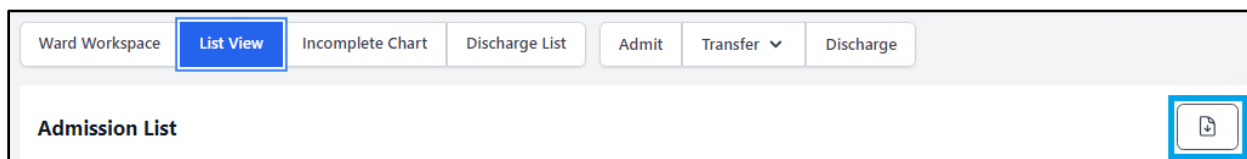


Figure 2-12: Export icon

The user will be asked to enter a Password. The password is case-sensitive and can be anything the user desires. The password will be required to open the Excel file once the file is created.

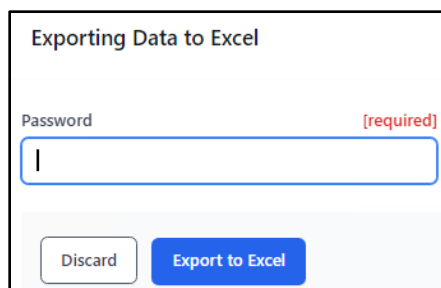


Figure 2-13: Data Export Password entry screen

After the password is entered, the user can select **Export to Excel** to initiate the export or **Discard** to exit.

The file will be named and saved to the Download folder as the default location, unless you have configured your browser to save to a specific location. If so, the user will be allowed to provide a file name and save location.

**Note:** The export max allowed is less than 2000 entries. A message will display to the user if it exceeds this amount.

## 2.4 Incomplete Chart

Click the **Incomplete Chart** button on the **ADT toolbar** to view or edit incomplete charts. Figure 2-14 shows an example of a typical **Incomplete Chart** window. Refer to Section 2.5 on how to add to the **Incomplete Chart**. The **Incomplete Chart** button is available for users who have the **DGZMENU** and **DGZPCC** security keys. A chart cannot be marked as complete until all deficiencies have been resolved.

|                |           |                  |                |       |            |           |
|----------------|-----------|------------------|----------------|-------|------------|-----------|
| Ward Workspace | List View | Incomplete Chart | Discharge List | Admit | Transfer ▼ | Discharge |
|----------------|-----------|------------------|----------------|-------|------------|-----------|

| Incomplete Charts                                           |                                                |                                          |                                           |                                    |                                                        |
|-------------------------------------------------------------|------------------------------------------------|------------------------------------------|-------------------------------------------|------------------------------------|--------------------------------------------------------|
| PATIENT                                                     | CATEGORY / SERVICE / INSURANCE                 | DISCHARGE WARD / DATE                    | PROVIDER                                  | CHART DEFICIENCY                   | STATUS/DATE                                            |
| BPRM,ENSCHED ERNIE<br>08-03-1945 - 348293                   | OBSERVATION<br>INTERNAL MED OBSERVATION<br>IHS | 11-02-2022<br>6 Days ago                 | DEMO,<br>DOCTOR<br>DEMO,<br>DOCTOR<br>NEW | 5266                               | Pending                                                |
|                                                             |                                                |                                          |                                           | 8197                               | Pending <a href="#">Edit</a>                           |
| BPRM,ENFUTURE<br>08-29-2000 - 897452                        | HOSPITALIZATION<br>GENERAL MEDICINE<br>IHS     | 11-02-2022<br>6 Days ago                 | DEMO,<br>DOCTOR<br>NEW                    | 8197                               | Pending <a href="#">Edit</a>                           |
| BPRM,ENAPPOINTMENTMINI<br>08-01-2022 - 452452               | HOSPITALIZATION<br>GENERAL MEDICINE<br>IHS     | EN PCU<br>11-02-2022<br>6 Days ago       | DEMO,<br>DOCTOR<br>NEW                    | A SHEET                            | Pending <a href="#">Edit</a>                           |
| DEMO,BPRM<br>10-03-1978 - 139715<br><span>Delinquent</span> | HOSPITALIZATION<br>GENERAL MEDICINE<br>MCD     | CZ ICU WARD<br>10-04-2022<br>35 Days ago | DEMO,<br>DOCTOR                           | PROGRESS<br>NOTES<br>AA DEFICIENCY | Pending<br>Resolved<br>10-31-2022 <a href="#">Edit</a> |

Figure 2-14: Typical Incomplete Chart window

The Incomplete Chart listing includes this information:

- Patient (name)
- Date of Birth
- HRN
- Delinquent Flag (when applicable)
- Category (type of visit)
- Service (treating specialty)
- Insurance Coverage
- Discharge Ward (from which patient was discharged)
- Discharge Date
- Number of Days since Discharge
- Provider
- Chart Deficiency
- Status
- Date

### 2.4.1 Filtering the Incomplete Chart Listing

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

#### 2.4.1.1 Service Filter

Use the **Service** drop-down list to filter the **Incomplete Chart** listing and show incomplete charts for either **all** or a selected **Service**.

#### 2.4.1.2 Category Filter

Use the **Category** drop-down list to filter the **Incomplete Chart** listing by the type of visit. The list offers these choices:

- All
- Hospitalization
- In Hospital
- Ambulatory
- Chart Review
- Observation
- Day Surgery

#### 2.4.1.3 Type

Use the **Type** drop-down list to filter the **Incomplete Chart** listing by these chart types:

- Pending
- Delinquent
- Incomplete
- All

#### 2.4.1.4 Sort By

Use the **Sort By** drop-down list to sort the **Incomplete Chart** listing by any of these criteria:

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

## 2.4.2 Incomplete Chart Detail

Select the **Edit** option from the entries in the **Incomplete Chart** listing to display the **Chart Detail** (Figure 2-15). Included are three sections:

- Chart Detail
- Action(s)
- Chart Deficiencies

**Chart Detail**

Insurance: PVT    Category: HOSPITALIZATION    Service: GENERAL MEDICINE    Discharge Ward: XINPATIENT ICU

**Action(s)** Action ▾

Date Chart Received: 10-06-2022 Remove

Date Chart Coded: 10-06-2022 Remove

Chart Coded By: Add

**Chart Deficiencies** Add

| PROVIDER | CHART DEFICIENCY | DATE RESOLVED | DATE DELINQUENT | DATE DELETED | RESOLUTION STATUS |
|----------|------------------|---------------|-----------------|--------------|-------------------|
| No data  |                  |               |                 |              |                   |

Discard Save

Figure 2-15: Incomplete Chart Detail dialog

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

- Insurance
- Category
- Service
- Discharge Ward

### 2.4.2.1 Chart Action(s) Section

**Chart Action** options (Table 2-5) are available as part of the chart completion process. Click **Action** on the upper right of the **Incomplete Chart Detail** window to add dates for any of the following options:

Table 2-5: Options under Actions menu for Chart Tracking Dates

| Option               | Description                                                                                             |
|----------------------|---------------------------------------------------------------------------------------------------------|
| 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.                     |
| 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.               |

To remove an **Action** click **Remove** next to the **Action** listed.

**Note:** The **Actions** displayed are based on the **ADT Parameter** setting.

### 2.4.2.2 Chart Deficiencies Section

The **Chart Deficiencies** 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 (Figure 2-16) to a chart.

Figure 2-16: Incomplete Chart Deficiency dialog

The dialog includes the following fields (Table 2-6). Refer to the **Glossary** for additional definitions:

Table 2-6: 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. Note: An inactive chart deficiency will not display in the list. |
| 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                                                                                                                                                                                        |

Figure 2-17 displays the options to **Resolve**, **Delete**, or **Edit** a **Chart Deficiency** that are available.

| Chart Deficiencies |                     |               |                 |              |                   | Add                     |
|--------------------|---------------------|---------------|-----------------|--------------|-------------------|-------------------------|
| PROVIDER           | CHART DEFICIENCY    | DATE RESOLVED | DATE DELINQUENT | DATE DELETED | RESOLUTION STATUS |                         |
| DEMO,LISA M RN     | A SHEET             |               | 10-10-2022      |              | Pending           | Resolve   Delete   Edit |
| DEMO,DOCTOR        | PROGRESS NOTES      |               | 10-10-2022      |              | Pending           | Resolve   Delete   Edit |
| DEMO,DOCTOR        | CONSULTATION REPORT |               | 10-10-2022      |              | Pending           | Resolve   Delete   Edit |

Discard Save

Figure 2-17: Chart Deficiencies—Resolve, Delete, and Edit options

Click the **Resolve** option to open the **Chart Deficiency** dialog with the **Date Resolved** field (Figure 2-18) now available. Confirm the information and click **OK** to mark a deficiency as resolved.

**Chart Deficiency**

Chart Deficiency [required]

Provider [required]

Date Delinquent

Date Resolved

Comments

Cancel OK

Figure 2-18: Chart Deficiency dialog with Date Resolved field available

Click the **Delete** option to open the **Chart Deficiency** dialog with the **Date Deleted** and **Delete Reason** fields (Figure 2-19 now available. Enter a **Deletion Reason** and click **OK** to mark a deficiency as deleted.

Figure 2-19: Chart Deficiency dialog with Date Deleted and Delete Reason fields available

Click the **Edit** option to open the **Chart Deficiency** dialog (Figure 2-20) with the **Chart Deficiency** field available.

**Note:** An inactive chart deficiency will not display in the list.  
Change **Chart Deficiency** and click **OK** to save changes.

Figure 2-20: Chart Deficiency dialog with Chart Deficiency field available

## 2.5 Discharge List

Click the **Discharge List** button on the **ADT Toolbar** to view a list of discharged patients. Figure 2-21 shows an example of a typical **Discharge List** window.

|                |           |                  |                |       |            |           |
|----------------|-----------|------------------|----------------|-------|------------|-----------|
| Ward Workspace | List View | Incomplete Chart | Discharge List | Admit | Transfer ▾ | Discharge |
|----------------|-----------|------------------|----------------|-------|------------|-----------|

| Discharge List                              |                       |                        |                                      |                   |                |
|---------------------------------------------|-----------------------|------------------------|--------------------------------------|-------------------|----------------|
| PATIENT                                     | ADMISSION DATE        | DISCHARGE DATE         | DISCHARGE STATUS/ DISCHARGE TYPE     | WARD AT DISCHARGE | LENGTH OF STAY |
| TEST,CARL<br>11-29-1955 - 147136            | 5/20/2024 8:44:00 AM  | 10/17/2024 9:50:00 AM  | DISCHARGED HOME<br>REGULAR DISCHARGE | GENERAL MEDICINE  | 150            |
| DEMO,PATIENT ABBY<br>01-17-1958 - 912345    | 10/14/2024 1:07:00 PM | 10/14/2024 11:45:00 PM | DISCHARGED HOME<br>REGULAR DISCHARGE | WEST              | 1              |
| TEST,JASON<br>04-01-2009 - 113388           | 10/14/2024 1:11:00 PM | 10/14/2024 2:00:00 PM  | DISCHARGED HOME<br>REGULAR DISCHARGE | WEST              | 1              |
| TEST,ANN<br>06-08-1964 - 445577             | 10/14/2024 1:24:00 PM | 10/14/2024 1:26:00 PM  | DISCHARGED HOME<br>REGULAR DISCHARGE | GENERAL MEDICINE  | 1              |
| TEST,AMELIE<br>12-07-2000 - 852555          | 10/10/2024 9:08:00 AM | 10/14/2024 9:25:00 AM  | DISCHARGED HOME<br>REGULAR DISCHARGE | WEST              | 4              |
| DEMO,ANGELA - ANGIE*<br>01-01-2000 - 223344 | 10/1/2024 9:10:00 AM  | 10/10/2024 9:21:00 AM  | DISCHARGED HOME<br>REGULAR DISCHARGE | EAST GENMED       | 9              |
| TEST,BUBBA<br>01-01-1970 - 456423           | 10/7/2024 8:57:00 AM  | 10/10/2024 8:58:00 AM  | DISCHARGED HOME<br>REGULAR DISCHARGE | WEST              | 3              |

Showing 1 to 7 of 7 results

Figure 2-21: Discharge List window

The **Discharge List** consists of the following:

- Patient (name)
- Date of Birth
- HRN
- Admission Date (and time)
- Discharge Date (and time)
- Discharge Status/Discharge Type
- Ward at Discharge
- Length of Stay (in days)

## 2.5.1 Filtering the Discharge List

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

### 2.5.1.1 Ward Filter

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

### 2.5.1.2 Date Filter

Use the **Date** drop-down list to filter the **Discharge List** based on these date criteria:

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

### 2.5.1.3 Sort By

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

- Patient Name
- Ward Name
- Discharge Date Asc (ascending)
- Discharge Date Dsc (descending)

## 2.5.2 Discharge List Context Menu

Right-click any of the entries in the **Discharge List** to display a context menu (Table 2-7) offering this action:

Table 2-7: 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 2.6.1.                                                |
| View Incomplete Chart   | Select this option to view the patient's Incomplete Chart.                                                                                                                                                     |
| Create Incomplete Chart | This option will be available at Discharge if the Incomplete Chart Entry is not selected in the ADT Parameter Settings. The incomplete chart must be created manually, rather than automatically at discharge. |
| Print A-Sheet           | Select this option to print an A-Sheet for the patient assigned to the selected bed. Refer to Section 2.7 for more information.                                                                                |

| Option                | Description                                                                                                                                                                           |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print Wrist Band      | Select this option to print a Wrist Band for the patient. Refer to Section 2.8 for more information.                                                                                  |
| 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. |

### 2.5.3 Create and Export Discharge List to Excel

Click the **Export** icon (on the far right) to create and export the discharge entries to an Excel file.

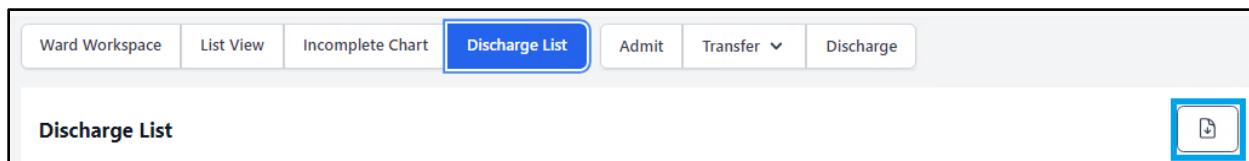


Figure 2-22: Export Icon

The user will be asked to enter a Password. The password is case-sensitive and can be anything the user desires. The password will be required to open the Excel file once the file is created.

 A screenshot of a modal window titled 'Exporting Data to Excel'. It contains a 'Password' input field with a red '[required]' label to its right. Below the input field are two buttons: 'Discard' and 'Export to Excel' (highlighted in blue).

Figure 2-23: Data Export Password entry screen

After the password is entered, the user can select **Export to Excel** to initiate the export or **Discard** to exit.

The file will be named and saved to the Download folder as the default location, unless you have configured your browser to save to a specific location. If so, the user will be allowed to provide a file name and save location.

**Note:** The export max allowed is less than 2000 entries. A message will display, to the user, if it exceeds this amount.

## 2.6 Admit

Click the **Admit** button on the **ADT Toolbar** to admit a patient. When this option is selected, the user must select the patient to admit, and can only select a patient that is not already admitted, deceased, or has a Temporary chart number. Once selected, the **Admit Patient** dialog (Figure 2-24) displays.

**Admit Patient**

Select Patient

Admission Date [required] 10-12-2022

Admission Time [required] 10:27 AM

Admission Type-UB-04 [required] Please Select

Admission Source-UB-04 [required] Please Select

Admission Type [required] Please Select

Diagnosis (Short) [required]

Ward Location [required] Please Select

Room-Bed

Facility Treating Specialty [required] Please Select

Referring Provider

Admitting Provider [required]

Attending Physician [required]

Condition [required] Please Select

Exclude from Directory ☐

Print A-Sheet ☐

Comments

Discard Save

Figure 2-24: Admit Patient dialog

The **Admit Patient** dialog includes the following fields (Table 2-8). Refer to the **Glossary** for additional definitions.

Table 2-8: Fields on the Admit Patient dialog

| Option                      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Patient              | <p>Type all or part of the patient's name (using a LAST,FIRST format), HRN, or DOB in the Select Patient field. If the name is found, click the patient's name in the listing displayed.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> Patient with a Temporary HRN is not selectable and will generate an error message: Cannot admit Patient with Temporary chart number. Contact medical records for new chart number.</p> </div> |
| Admission Date              | Field defaults to current date. User can edit the date and time if needed.                                                                                                                                                                                                                                                                                                                                                                                      |
| Admission Time              | Field defaults to current time. User can edit the date and time if needed.                                                                                                                                                                                                                                                                                                                                                                                      |
| 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 Admission Source. Note: Discontinued admission source will no longer display in the list.                                                                                                                                                                                                                                                                                                                          |
| 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].                                                                                                                                                                                                                                                                                                                                                                  |
| Ward Location               | Select from the list options the ward which the patient will be admitted to.                                                                                                                                                                                                                                                                                                                                                                                    |
| Room-Bed                    | Enter ?? to see the list of available room-beds that the patient can be admitted to. The list is based on the currently selected ward location.                                                                                                                                                                                                                                                                                                                 |
| Facility Treating Specialty | <p>Select from the list of available options</p> <p>Note: If an Observation unit is selected and the Patient is subsequently transferred to another Treating specialty, only Observation units will display for selection. The Patient must be discharged from Observation before they can be readmitted to a Non-Observation ward.</p>                                                                                                                         |
| Referring Provider          | Enter the name of the referral provider. This is a free-text field.                                                                                                                                                                                                                                                                                                                                                                                             |
| 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.                                                                                                                                                                                                                                                                                                        |

| Option                 | Description                                                                                                                                                                                                                                                                                                                                           |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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, Do Not Resuscitate, or both (SI & DNR). This will be indicated on their Bed Tile in the Ward Workspace and on patient header.                                                                                                                                                   |
| Exclude from Directory | Select the check box to indicate that the patient does not want 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 and List view.                                                                                                       |
| Print A-Sheet          | Select the check box to print A-Sheet immediately after the form is saved. When selected, the user is prompted to enter an RPMS Printer Device. Refer to Section 2.7 for more information about the A-Sheet.                                                                                                                                          |
| Comments               | Enter free-text comments related to this admission.<br>Note: A short display of comments will display on the tile. If there is more, an ellipsis will display to indicate additional comments are available. A hover is available to see up to ~200 characters. Comments more than 200 characters, must be viewed by selecting View Admission Detail. |

### 2.6.1 Inpatient Admission Detail

From either the **Ward Workspace**, **List View**, or **Discharge List**, select a patient to access the context menu. Select **View Admission Detail** to view detailed information about the patient's admission. Figure 2-25 shows an example of a typical **Inpatient Admission Detail** dialog.

**DEMO, BCMATWO**  
12-08-1971 (50) - MALE  
HRN: 147514  
Eligibility Status: CHS & DIRECT

**Inpatient Admission Detail** Edit

|           |                                                         |                              |                                          |
|-----------|---------------------------------------------------------|------------------------------|------------------------------------------|
| Admission | Admission Date<br>10-12-2022 10:27 AM                   | Exclude from Directory<br>NO | Admission Type-UB-04<br>EMERGENCY        |
|           | Admission Source-UB-04<br>BORN OUTSIDE OF THIS HOSPITAL | Admission Type<br>DIRECT     | Transfer Facility                        |
|           | Ward Location<br>INPATIENT                              | Room-Bed                     | Diagnosis (Short)<br>Shortness of Breath |
|           | Facility Treating Specialty<br>INTERNAL MED OBSERVATION | Referring Provider           | Admitting Provider<br>DEMO, DOCTOR       |
|           | Attending Physician<br>DEMO, DOCTOR                     | Comments                     |                                          |

**Transfers**

| DATE    | TYPE | TRANSFERRED TO |
|---------|------|----------------|
| No data |      |                |

Close

Figure 2-25: Inpatient Admission Detail dialog—example

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

- Admission Date/Time
- Exclude from Directory
- Admission Type-UB-04
- Admission Source-UB-04
- Admission Type
- Transfer Facility
- Ward Location
- Room-Bed
- Diagnosis (Short)
- Facility Treating Specialty
- Referring Provider
- Admitting Provider
- Attending Physician
- Comments

### 2.6.1.1 Transfers Section

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

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

### 2.6.1.2 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 Status
- Transfer Facility (if applicable)

## 2.7 A-Sheet Report

The **A-Sheet Report** (Figure 2-27) is accessible from:

- The **Ward Workspace** as described in Section 2.2.
- The **List View** as described in Section 2.3.
- The **Discharge List** as described in Section 2.5.

To print an **A-Sheet Report**, select **Print A-Sheet** from the right-click context menu options. The **Print -A-Sheet** dialog (Figure 2-26) displays.

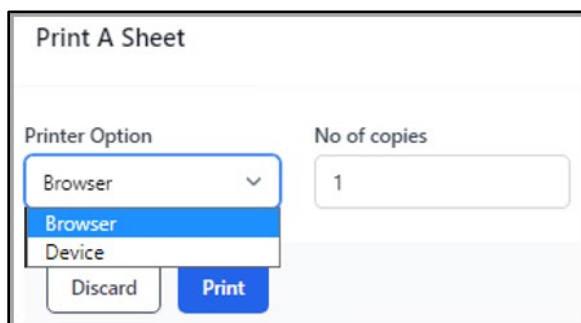


Figure 2-26: Print A Sheet dialog

The user is prompted to select **Browser** or **Device** for printer options and to enter the **No of Copies** to print. The default is **1**.

- If **Browser** is selected, a preview of the patient's **A Sheet Report** displays, and the user will be able to print to a local printer.
- If **Device** is selected, use a **partial name search** to find the appropriate **RPMS device printer** or enter **??** to see all the available printers. The last used printer displays as the default. Click **Print** and the **A Sheet Report** (Figure 2-27) is printed.

**Note:** Printers can be searched by **printer name**, **printer mnemonic** (will display within search results), or **local synonym**. Refer to the *BPRM Application Overview User Manual* for more information.

| 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  |  |
| 98-98-98                                                                   |  |                        |  | INDIAN/ALAS    |  | DEMO HOSP               |  | 232101            |  |
| 3 Last Name, First, Middle                                                 |  |                        |  | 13 Age         |  | 14 Religion             |  | 15 Hr Admit       |  |
| DEMO,DEBBIE                                                                |  |                        |  | 60             |  |                         |  | 1909              |  |
| 16 Admit Code                                                              |  | 1 DIRECT               |  |                |  |                         |  |                   |  |
| 4 Birthdate                                                                |  | 5 Sex                  |  | 6 Tribe        |  | 17818 Admit Srvc & Code |  | 19 Admit Date     |  |
| 01/01/1962                                                                 |  | F                      |  | CHO031         |  | GM 03                   |  | NOV 21, 2022      |  |
| 8 Community Code                                                           |  | Admtg Ward             |  | Admtg Provider |  | 20 Discharge Date       |  |                   |  |
| 221-02-02                                                                  |  | INPATIENT              |  | DEMO,DOCTOR    |  |                         |  |                   |  |
| 9 Present Address                                                          |  |                        |  |                |  |                         |  | 22 Length of Stay |  |
| THOMPSON BLV ANCHORAGE, AK 87120                                           |  |                        |  |                |  |                         |  |                   |  |
| 23 Next of Kin                                                             |  | Telephone              |  | Address        |  | Relationship            |  |                   |  |
|                                                                            |  |                        |  |                |  |                         |  |                   |  |
| 24 Person to Notify                                                        |  |                        |  |                |  |                         |  |                   |  |
| 25 Admitting Diagnosis                                                     |  |                        |  |                |  |                         |  |                   |  |
| Shortness of Breath                                                        |  |                        |  |                |  |                         |  |                   |  |
| Insurance Coverage                                                         |  |                        |  |                |  |                         |  |                   |  |
| 26 ICD 27 POA 28 Established DX                                            |  |                        |  |                |  |                         |  |                   |  |
| 29 ICD 30 DX 31 Op & Selec Procedures 32 Infect Date Phys Code             |  |                        |  |                |  |                         |  |                   |  |
| 34 Discharge Type 35 Facility Transferred To                               |  |                        |  |                |  |                         |  |                   |  |
| 37 & 38 Discharge Service and Code 39 # Consults                           |  |                        |  |                |  |                         |  |                   |  |
| 40 Injury Date 41 Alleged Injury Cause 42&43 CAUSE & Place of Occurrence   |  |                        |  |                |  |                         |  |                   |  |
| 47 Underlying Cause of Death & Code                                        |  |                        |  |                |  |                         |  |                   |  |
| 49 Date                                                                    |  | 50 Attending Physician |  | 50a Phys. Code |  | 51 Admit/Coded By       |  |                   |  |
| Apr 12, 2023                                                               |  | DEMO,DOCTOR            |  | 27600          |  | TW                      |  |                   |  |
| 52 Date & Time Printed                                                     |  |                        |  |                |  |                         |  |                   |  |
| Apr 12, 2023 1:06:02 pm                                                    |  |                        |  |                |  |                         |  |                   |  |

Figure 2-27: A-Sheet Report example

## 2.8 Print Wrist Band

The **Print Wrist Band** option (Figure 2-28) is accessible from:

- The Ward Workspace as described in Section 2.2.
- The List View as described in Section 2.3.
- The Discharge List as described in Section 2.5.

To print a **Patient Wrist Band**, select **Print Wrist Band** from the right-click context menu options. The user is prompted to select **Browser** or **Device** for printer options (Figure 2-28).

- If **Browser** is selected, a preview of the patient's **wristband** displays, and the user will be able to print to a local printer.
- If **Device** is selected, use a **partial name search** to find the appropriate **RPMS device printer** or enter **??** to see all the available printers. The last used printer displays as the default. Click **Print** and the **Patient Wrist Band** is printed.

**Note:** Printers can be searched by **printer name**, **printer mnemonic** (will display within search results), or **local synonym**. Refer to the *BPRM Application Overview User Manual* for more information.



Figure 2-28: Print Wrist Band dialog

## 2.9 Transfer

Click the **Transfer** button on the **ADT Toolbar** to display the **Transfer** menu (Figure 2-29). Options on the **Transfer** menu allow the user to transfer a patient, who is currently admitted, to a different ward, treating specialty, bed, or provider.

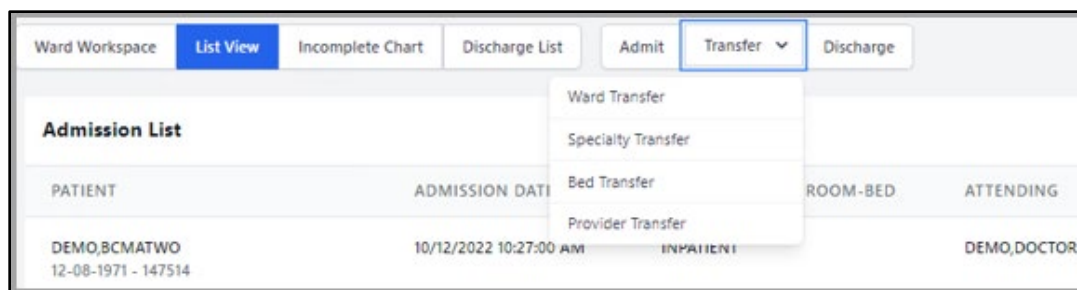


Figure 2-29: Transfer menu

Each option on the **Transfer** menu provides a dialog associated with that type of transfer. These dialogs are described in Sections 2.9.1, 2.9.2, 2.9.3, and 2.9.4.

**Note:** Transfers cannot be completed at the same time as another movement time.

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

### 2.9.1 Ward Transfer

Select **Ward Transfer** on the **Transfer** menu to transfer a patient to a different ward. When this option is selected, the user must select the patient to transfer. Once selected, the **Ward Transfer** dialog (Figure 2-30) displays.

Figure 2-30: Ward Transfer dialog

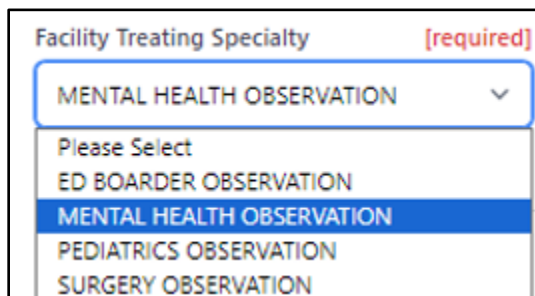
The **Ward Transfer** dialog includes these fields:

- Patient information (Limited to currently admitted patients)
- Transfer Date
- Transfer Time
- Ward
- Room-Bed
- Associate Treating Specialty Transfer
- Facility 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.

## 2.9.2 Treating Specialty Transfer

Select **Specialty Transfer** on the **Transfer** menu to transfer a patient to a different treating specialty. When this option is selected, the user must select the patient to transfer. Once selected, the **Treating Specialty Transfer** dialog (Figure 2-32) displays.

**Note:** If the patient is initially admitted to an Observation unit, and subsequently transferred to another Treating Specialty, only other Observation units will display for selection.



The screenshot shows a dropdown menu titled "Facility Treating Specialty" with a red "[required]" label. The current selection is "MENTAL HEALTH OBSERVATION". The dropdown list is open, showing the following options: "Please Select", "ED BOARDER OBSERVATION", "MENTAL HEALTH OBSERVATION" (highlighted in blue), "PEDIATRICS OBSERVATION", and "SURGERY OBSERVATION".

Figure 2-31: Observation Unit selection

**DEMO, PATIENT ABBY** SI

01-17-1958 (65) - FEMALE  
PCP: DEMO, DOCTOR  
Admitted on 01-13-2023 03:36 PM at EN PCU [ EN PCU -003 ]

HRN: 912345  
Eligibility Status: CHS & DIRECT  
Attending Physician: DEMO, DOCTOR

**Treating Specialty Transfer**

Transfer Date [required]

Transfer Time [required]

Facility Treating Specialty [required]

Attending Physician [required]

Comments

Figure 2-32: Treating Specialty Transfer dialog

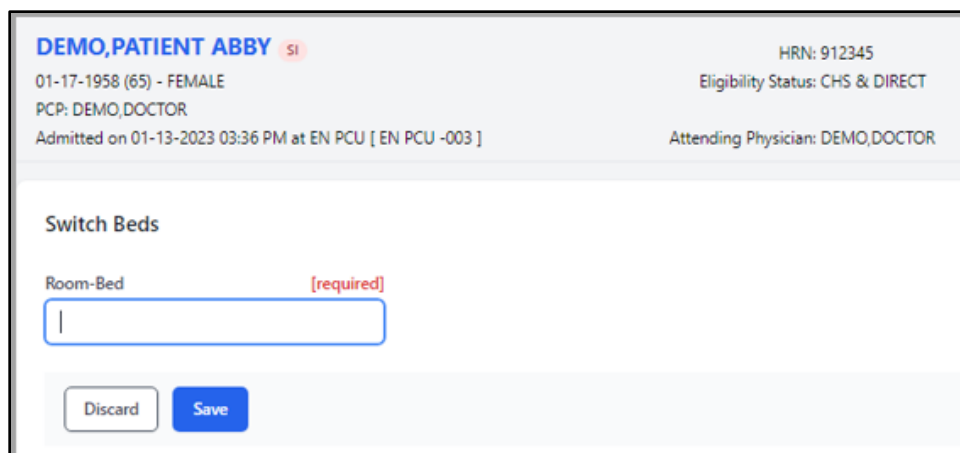
The **Treating Specialty Transfer** dialog includes these fields:

- Patient information (Limited to currently admitted patients)
- Transfer Date
- Transfer Time
- Facility Treating Specialty
- Attending Physician
- Comments

### 2.9.3 Bed Transfer

Select **Bed Transfer** on the **Transfer** menu to transfer a patient to a different bed. When this option is selected, the user must select the patient to transfer. Enter **??** to see a list of available room-beds that the patient can be admitted to. The list is based on the current ward location.

Once selected, the **Switch Beds** dialog (Figure 2-33) displays.



**DEMO,PATIENT ABBY** SI

01-17-1958 (65) - FEMALE  
PCP: DEMO,DOCTOR  
Admitted on 01-13-2023 03:36 PM at EN PCU [ EN PCU -003 ]

HRN: 912345  
Eligibility Status: CHS & DIRECT  
Attending Physician: DEMO,DOCTOR

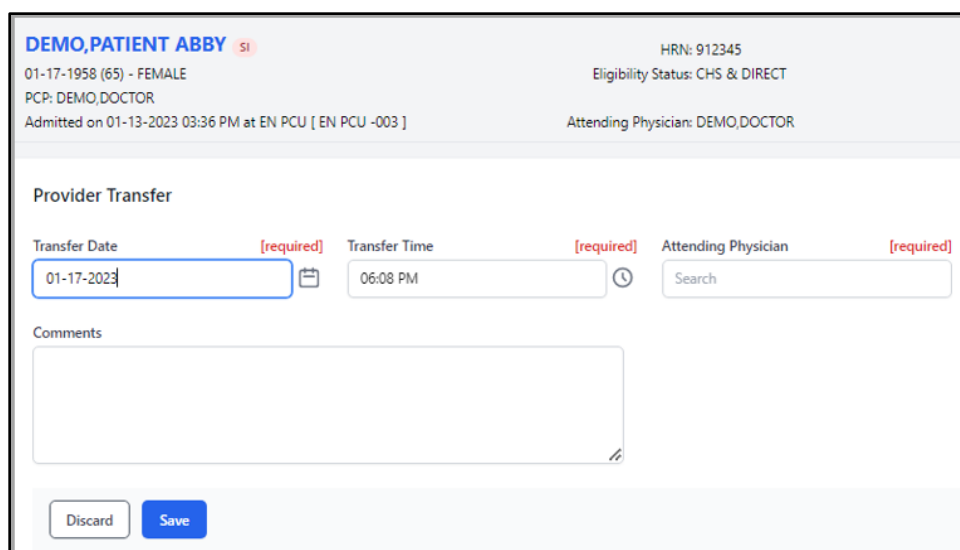
**Switch Beds**

Room-Bed [required]

Figure 2-33: Switch Beds dialog

## 2.9.4 Provider Transfer

Select **Provider Transfer** on the **Transfer** menu to transfer a patient to a different attending provider. When this option is selected, the user must select the patient to transfer. Once selected, the **Provider Transfer** dialog (Figure 2-34) displays.



**DEMO,PATIENT ABBY** SI

01-17-1958 (65) - FEMALE  
PCP: DEMO,DOCTOR  
Admitted on 01-13-2023 03:36 PM at EN PCU [ EN PCU -003 ]

HRN: 912345  
Eligibility Status: CHS & DIRECT  
Attending Physician: DEMO,DOCTOR

**Provider Transfer**

Transfer Date [required]   Transfer Time [required]   Attending Physician [required]

Comments

Figure 2-34: Provider Transfer dialog

The **Provider Transfer** dialog includes these fields:

- Patient information (Limited to currently admitted patients)
- Transfer Date
- Transfer Time
- Attending Physician

- Comments

## 2.10 Cancel Admission

The user is able to cancel an admission for a patient in active admit status only, where the last movement was the admission. This option is available from both the Bed Tile context menu and the List View admission list. Right-click on the patient you wish to cancel the admission for and select Cancel Admission.

Once selected, the **Cancel Admission** dialog (Figure 2-35) displays and requires a Deletion Reason.

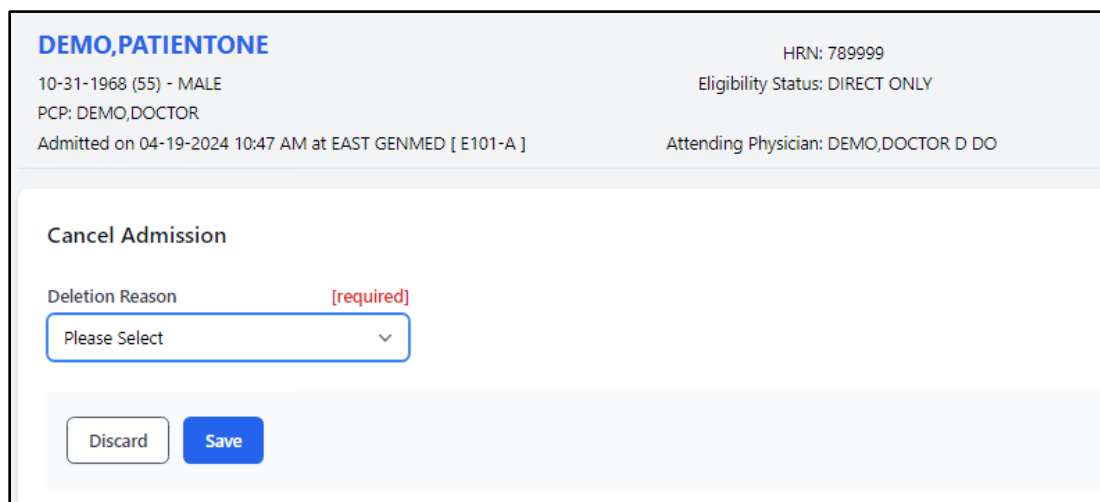


Figure 2-35: Cancel Admission dialog

The **Cancel Admission** dialog includes the following Deletion Reasons:

- Admit Error
- Patient Refused
- Left Without Being Seen
- Other

**Note:** The user cannot cancel an admission that is beyond the Lockout Date.

## 2.11 Discharge

Click the **Discharge** button on the **ADT Toolbar** to discharge a patient. When this option is selected, the user must select a patient who is currently admitted to discharge. Once selected, the **Discharge Patient** dialog (Figure 2-36) displays.

**DEMO, PATIENT ABBY** SI

01-17-1958 (65) - FEMALE  
PCP: DEMO, DOCTOR  
Admitted on 01-13-2023 03:36 PM at EN PCU [ EN PCU -003 ]

HRN: 912345  
Eligibility Status: CHS & DIRECT  
Attending Physician: DEMO, DOCTOR

**Discharge Patient**

Discharge Date [required]

Discharge Time [required]

Type of Discharge [required]

Discharge Status-UB-04 [required]

Figure 2-36: Discharge Patient dialog

The **Discharge Patient** dialog includes these fields:

- Patient information (Limited to currently admitted patients)
- Discharge Date
- Discharge Time
- Type of Discharge
- Discharge Status-UB-04
- Re Admit Patient (only displays for patients in Observation)

Selecting **Transferred** as a **Type of Discharge** displays the **Transfer Facility** 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 **Registration** module, which marks the patient record as inactive.

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

## 2.12 Cancel Discharge

The user is able to cancel a discharge for a patient in discharge status only, where the last movement was the discharge. This option is available from Discharge list. Right-click on the patient you wish to cancel the discharge for and select Cancel Discharge.

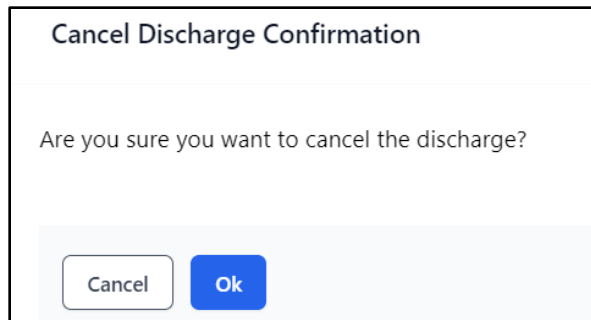


Figure 2-37: Cancel Discharge dialog

## 3.0 ADT Configuration

The ADT Settings module enables users to set ADT site parameters, as well as add/edit Chart Deficiencies, Room-Beds, and Wards. Changes made within the Settings module are typically performed by a Supervisor or Site Manager. In most cases, once these settings have been established, they 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.

You must log off and log back in to the BPRM application for any ADT configuration changes to take effect.

Open the **Settings** module by clicking **Settings** (lower left), as shown in Figure 3-1.

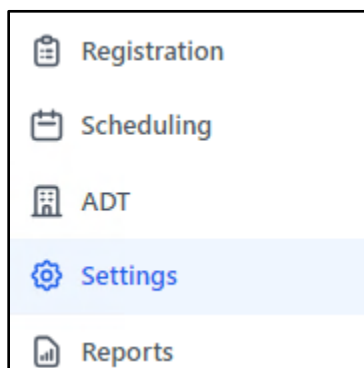


Figure 3-1: Accessing the Settings module

The selection pane on the left displays a list of available options (Figure 3-2) under **ADT**. The information displayed on the right side of the window varies, depending on the option selected.

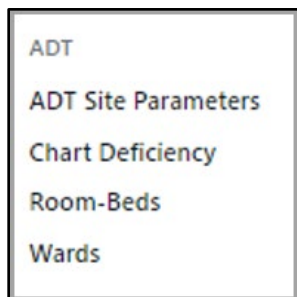


Figure 3-2: ADT Settings options

### 3.1 Site Parameters—ADT

Click **Settings**, then **ADT Site Parameters** (under ADT) to access the **ADT Site Parameters** dialog. An example of the **ADT Site Parameters** dialog is shown in Figure 3-3.

**ADT Parameters**

|                                     |                                              |                                                        |                                                           |
|-------------------------------------|----------------------------------------------|--------------------------------------------------------|-----------------------------------------------------------|
| Census Lockout Days<br>30           | Minimum Age for Adult Patients<br>18         | Final A Sheet Default<br>A SHEET ONLY                  | Clinical Record Brief Format<br>IHS CLINICAL RECORD BRIEF |
| Admission Request Clinic<br>[Empty] | Day Surgery Hospital Location<br>DEMO CLINIC | Request Chart at Admission<br><input type="checkbox"/> | Use Locator Cards<br><input type="checkbox"/>             |

**Bulletin**

|                                                                       |                                                                 |                                                        |                                                        |
|-----------------------------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------|--------------------------------------------------------|
| Admit After DS Bulletin<br><input type="checkbox"/>                   | Time Length for Admit DS<br>[Empty]                             | Readmission Bulletin<br><input type="checkbox"/>       | Time Length for Readmission<br>[Empty]                 |
| Readmit within 24 Hrs Bulletin<br><input checked="" type="checkbox"/> | Transfer in Bulletin<br><input type="checkbox"/>                | Admission <24 Hrs Bulletin<br><input type="checkbox"/> | Admission Deleted Bulletin<br><input type="checkbox"/> |
| ICU Transfer Bulletin<br><input type="checkbox"/>                     | Return To ICU Bulletin<br><input type="checkbox"/>              | Time Length for Return to ICU<br>[Empty]               | Transfer Out Bulletin<br><input type="checkbox"/>      |
| AMA Discharge Bulletin<br><input type="checkbox"/>                    | Inpatient Death Bulletin<br><input checked="" type="checkbox"/> |                                                        |                                                        |

**Incomplete Chart**

|                                                               |                                                                            |                                                                |                                                                 |
|---------------------------------------------------------------|----------------------------------------------------------------------------|----------------------------------------------------------------|-----------------------------------------------------------------|
| Days To Delinquency<br>30                                     | Incomplete Chart Entry At Discharge<br><input checked="" type="checkbox"/> | Bill Prep Tracked<br><input checked="" type="checkbox"/>       | Date Chart Received Used<br><input checked="" type="checkbox"/> |
| Date Chart Tagged Used<br><input checked="" type="checkbox"/> | Date Insurance Identified Used<br><input checked="" type="checkbox"/>      | Date Ready To Code Used<br><input checked="" type="checkbox"/> | Date Chart Coded Used<br><input checked="" type="checkbox"/>    |
| Date Bill Prep Used<br><input checked="" type="checkbox"/>    | Date Billed Used<br><input checked="" type="checkbox"/>                    |                                                                |                                                                 |

Discard Save

Figure 3-3: ADT Site Parameters dialog

### 3.1.1 Fields on the ADT Site Parameters Dialog

The **ADT Site Parameters** dialog includes the following parameter fields shown in Table 3-1, Table 3-2, and Table 3-3.

Table 3-1: ADT Parameters

| ADT Parameters                 | Description                                                                                                                                                           |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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. |
| Minimum Age for Adult Patients | Indicates the minimum age for adult patients This is usually set to 18.                                                                                               |
| Final A Sheet Default          | Use this option to indicate the default for printing a final A Sheet. Users have the option to include a CPT list or print a Medicare/Medicaid A Sheet.               |
| Clinical Record Brief Format   | Enter the A Sheet format used by your facility. Choose A Sheet forms only.                                                                                            |
| Admission Request Clinic       | Enter the clinic to be used when requesting admission charts. Must be a clinic.                                                                                       |
| Day Surgery Hospital Location  | Enter a hospital location. Each Division must have a valid clinic entered in the Day Surgery Hospital Location.                                                       |
| Request Chart at Admission     | Select the check box to indicate Yes, that the clinic requests a chart at admission.                                                                                  |
| Use Locator Cards              | Select check box to indicate Yes, the clinic will use Locator Cards.                                                                                                  |

Table 3-2: ADT Bulletin Parameters

| ADT Bulletin Parameters     | Description                                                                                                                                |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Admit After DS Bulletin     | Select check box to indicate Yes. Triggers a bulletin for all admissions that occur within a specified number of days after a day surgery. |
| Time Length for Admit DS    | The # of days after a day surgery that an admission warrants a bulletin.                                                                   |
| Readmission Bulletin        | Select check box to indicate Yes. Triggers a bulletin on any readmission that occurs within a specified number of days from discharge.     |
| Time Length for Readmission | The # of days within which a readmission warrants a bulletin.                                                                              |

| <b>ADT Bulletin Parameters</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                    |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Readmit within 24 Hrs Bulletin | Select check box to indicate Yes. Triggers a bulletin on any readmission that occurs within 24 hours of discharge.                                                                                                                                                                                                                    |
| Transfer In Bulletin           | Select check box to indicate Yes. Triggers the transfer in from another facility 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. |
| Admission <24 Hrs Bulletin     | Select check box to indicate Yes to trigger a bulletin when admission is less than 24 hours.                                                                                                                                                                                                                                          |
| Admission Deleted Bulletin     | Select check box to indicate Yes. 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.                                                                                                                              |
| ICU Transfer Bulletin          | Select check box to indicate Yes. Triggers a bulletin on all transfers to an ICU.                                                                                                                                                                                                                                                     |
| Return to ICU Bulletin         | Select check box to indicate Yes. Triggers a bulletin when patients are returned to the ICU within a specified time frame.                                                                                                                                                                                                            |
| Time Length for Return to ICU  | Enter Triggers a bulletin when patients are returned to the ICU within a specified time frame. The Time Length for Return to ICU is the # of days within which a return to ICU warrants a bulletin.                                                                                                                                   |
| Transfer Out Bulletin          | Select check box to indicate Yes. Triggers a bulletin upon any discharges to other inpatient facilities.                                                                                                                                                                                                                              |
| AMA Discharge Bulletin         | Select check box to indicate Yes. Triggers a bulletin on any AMA (against medical advice) discharges.                                                                                                                                                                                                                                 |
| Inpatient Death Bulletin       | Select check box to indicate Yes. Triggers a bulletin on all inpatient deaths.                                                                                                                                                                                                                                                        |

Table 3-3: ADT Incomplete Chart Parameters

| <b>ADT Incomplete Chart Parameters</b> | <b>Description</b>                                                                                     |
|----------------------------------------|--------------------------------------------------------------------------------------------------------|
| Days to Delinquency                    | Number of days needed before a chart becomes delinquent.                                               |
| Incomplete Chart Entry at Discharge    | Select check box to indicate Yes. Determines whether to create an incomplete chart entry at discharge. |

| ADT Incomplete Chart Parameters | Description                                                                                |
|---------------------------------|--------------------------------------------------------------------------------------------|
| Bill Prep Tracked               | Select check box to indicate that bill prep completion dates are tracked at your facility. |
| Date Chart Received Used        | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Chart Tagged Used          | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Insurance Identified Used  | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Ready To Code Used         | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Chart Code Used            | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Bill Prep Used             | Select check box to indicate that this date is used for tracking charts at the facility.   |
| Date Billed Used                | Select check box to indicate that this date is used for tracking charts at the facility.   |

After entering the ADT Site Parameters dialog information, click **Save** to save the information, or click **Discard** to close the dialog without saving the information.

## 3.2 Chart Deficiency

Click **Settings**, then **Chart Deficiency** (under ADT) to access the **Chart Deficiency** listing. An example of the **Chart Deficiency** listing is shown below in Figure 3-4.

| NAME                    | ABBREVIATION | GROUPING     | ACTIVE |
|-------------------------|--------------|--------------|--------|
| ANESTHESIA NOTE         | ANS          |              | NO     |
| AWAITING TRANS NS       | AWTNS        | ADMIN ONLY   | YES    |
| AWAITING TRANS OR       | AWTOR        | ADMIN ONLY   | NO     |
| BIRTH/DEATH CERTIFICATE | BOC          |              | NO     |
| BLOOD TRANSFUSION       | BT           |              | NO     |
| CHART                   | CH           |              | NO     |
| CONSULTATION REPORT     | CON          | SIGNATURE    | YES    |
| DICT NARR SUMMARY       | NS           | DSCH SUMMARY | YES    |
| DICT OP REPORT          | OR           | OP REPORT    | NO     |
| EKG REPORT              | EKG          |              | NO     |

Figure 3-4: Chart Deficiency listing

Use the **Chart Deficiency** option in the **Settings** module to add chart deficiencies to the RPMS database or edit information about existing ones.

### 3.2.1 Search for a Chart Deficiency

The **Chart Deficiency** window of the **Settings** module lists all of the chart deficiencies in the RPMS database. Each window of the display shows **10** chart-deficiencies. Use the **left** and **right arrows** or select a **number** at the lower-right corner of the window to navigate to other windows. The current window number is highlighted.

Use the **Filter by Name** field in the upper right corner of the window to narrow down your search for a specific chart deficiency. Type any part of a **chart deficiency name** in the field and press **Enter**. The filtered list of chart deficiencies displays.

### 3.2.2 Add a new Chart Deficiency

Click the **Add Chart Deficiency** button in the upper right corner of the **Chart Deficiency** window to set up a new chart deficiency. The **Chart Deficiency** dialog shown in Figure 3-5 displays.

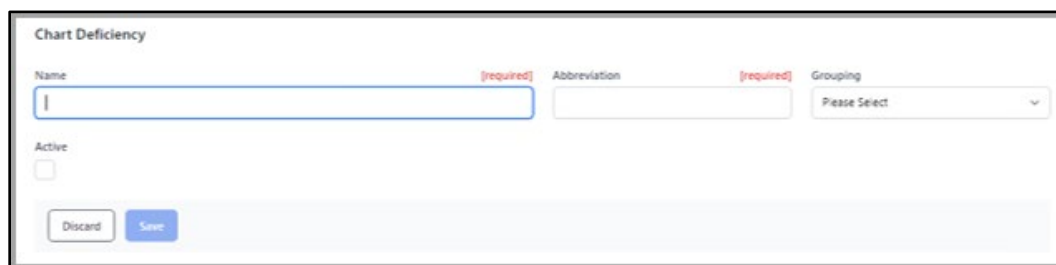
The image shows a 'Chart Deficiency' dialog box. It has three input fields at the top: 'Name' with a red '[required]' label, 'Abbreviation' with a red '[required]' label, and 'Grouping' with a dropdown menu showing 'Please Select'. Below these is an 'Active' checkbox. At the bottom are two buttons: 'Discard' and 'Save'.

Figure 3-5: Chart Deficiency 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 **Discard** to close the dialog without saving the entries.

### 3.2.3 Edit a Chart Deficiency

Select a **chart deficiency** from the **Chart Deficiency** window as described in the Section 3.2.1 section, then click **Edit** to the right of the **chart deficiency name** to edit the fields. This opens the **Chart Deficiency** dialog.

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

## 3.3 Room-Beds

Click **Settings** then **Room-Beds** (under ADT) to access the **Room-Beds** listing. An example of the **Room-Beds listing** is shown below in Figure 3-6.

| NAME  | BED PHONE | DESCRIPTION             | OUT OF SERVICE / REASON FOR INACTIVATION |                   |
|-------|-----------|-------------------------|------------------------------------------|-------------------|
| 100-1 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 100-1 |           | Intensive Care Unit     | NO                                       | Edit   Inactivate |
| 101-1 | 5400      | NEXT TO NURSING STATION | NO                                       | Edit   Inactivate |
| 101-2 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 102-1 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 102-2 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 103-1 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 103-2 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 104-1 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |
| 104-2 |           | NO DESCRIPTION          | NO                                       | Edit   Inactivate |

Figure 3-6: Room-Beds listing

Use the **Room-Beds** option in 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.

### 3.3.1 Search for a Room-Bed

The **Room-Beds** window of the **Settings** module lists all of the room-beds in the **RPMS** database. Each window of the display shows 10 room-beds. Use the **left** and **right arrows** or select a **number** at the lower-right corner of the window to navigate to other windows. The current window number is highlighted.

Use the **Filter by Room-Beds** field in the upper right corner of the window to narrow down your search for a specific room-bed. Type any part of a **room-bed name** in the field and press **Enter**. The filtered list of **room-beds** displays.

### 3.3.2 Add a New Room-Bed

1. Click the **Add Room-Beds** button in the upper right corner of the **Room-Bed** window to set up a new room-bed. The **Room-Bed** dialog shown in Figure 3-7 displays.

Room-Bed

Name [required]

Name is a required field.

Description [required] Bed Phone

Please Select

Description is a required field.

Ward(s)

Add

Discard Save

Figure 3-7: Room-Bed dialog

The **Room-Bed** dialog displays the following information:

- Room-Bed Name
- Description
- Bed Phone

2. Fill in the fields of the dialog as appropriate for the room-bed.

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

3. Click **Add** under **Ward(s)** to add the **Ward(s)** as needed.
4. Once complete, click **Save** to save the entries and close the dialog or click **Discard** to close the dialog without saving the entries.

### 3.3.3 Edit a Room-Bed

1. Select a room-bed from the **Room-Bed** window as described in the Section 3.3.1 then click **Edit** to the right of the room-bed name to edit the fields. This opens the **Room-Bed** dialog.
2. Edit the fields of the dialog as appropriate. Click **Add** to add additional **Ward(s)** or click **Remove** to delete an existing **Ward(s)**, as needed.
3. Click **Save** to save the entries and close the dialog or click **Discard** to close the dialog without saving the entries.

### 3.3.4 Inactivate a Room-Bed

Select a room-bed from the **Room-Bed** window as described in Section 3.3.1 then click **Inactivate** to the right of the room-bed name to edit the fields. This opens the **Inactivate Room-Bed** dialog as shown in Figure 3-8.

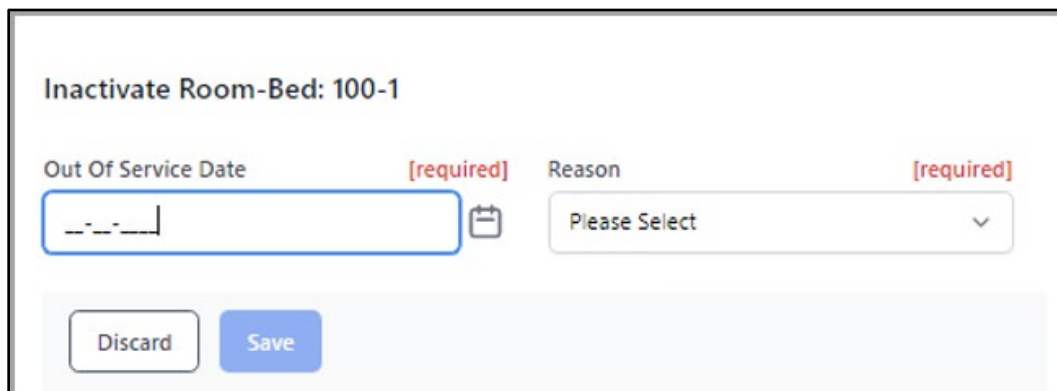
The dialog box is titled "Inactivate Room-Bed: 100-1". It contains two required fields: "Out Of Service Date" with a date picker icon and "Reason" with a dropdown menu showing "Please Select". Both fields are marked with "[required]" in red. At the bottom, there are two buttons: "Discard" and "Save".

Figure 3-8: Inactivate Room-Bed dialog

Enter the **Out of Service Date** and **Reason** for inactivating the room-bed. Click **Save** to save the inactivation and close the dialog or click **Discard** to close the dialog without saving.

### 3.3.5 Reactivate a Room-Bed

1. Select a **room-bed** that is inactive from the **Room-Bed** window as described in Section 3.3.1.
2. Click **Reactivate** to the right of the **room-bed** name to edit the fields. This opens the **Reactivate Room-Bed** dialog (Figure 3-9).

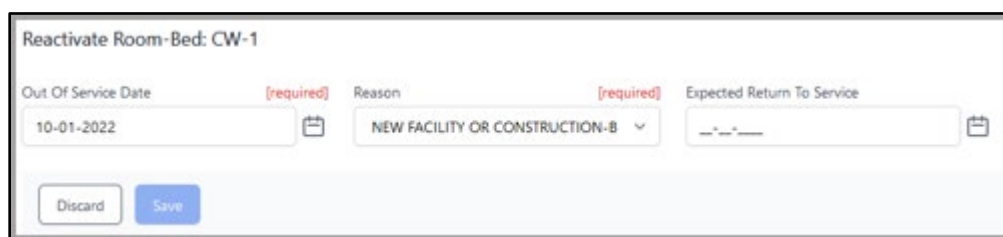
The dialog box is titled "Reactivate Room-Bed: CW-1". It contains three fields: "Out Of Service Date" with a date picker icon and the value "10-01-2022", "Reason" with a dropdown menu showing "NEW FACILITY OR CONSTRUCTION-B", and "Expected Return To Service" with a date picker icon. All three fields are marked with "[required]" in red. At the bottom, there are two buttons: "Discard" and "Save".

Figure 3-9: Reactivate Room-Bed dialog

3. Enter the **Expected Return to Service** date.
4. Click **Save** to save the reactivation and close the dialog or click **Discard** to close the dialog without saving.

The bed becomes available after the date entered for **Expected Return to Service** has passed.

**Note:** To reactivate a bed to be used today, yesterday's date must be entered.

## 3.4 Wards

Click **Settings** then **Wards** (under **ADT**) to access the **Wards** listing. An example of the Wards listing is shown below in Figure 3-10.

| NAME                       | ABBREVIATION | DIVISION           | INACTIVE | NURSING SERVICE |                                   |
|----------------------------|--------------|--------------------|----------|-----------------|-----------------------------------|
| COMMUNITY GENERAL HOSPITAL | CGH          | 2013 DEMO HOSPITAL | YES      | MED             | <a href="#">Edit   Reactivate</a> |
| CZ GENERAL WARD            | CGW          | 2013 DEMO HOSPITAL | YES      | MED             | <a href="#">Edit   Reactivate</a> |
| CZ ICU WARD                | CIW          | 2013 DEMO HOSPITAL | NO       | ICU             | <a href="#">Edit   Inactivate</a> |
| CZ SURGERY                 | CS           | 2013 DEMO HOSPITAL | NO       | SUR             | <a href="#">Edit   Inactivate</a> |
| CZ WARD                    | CW           | 2013 DEMO HOSPITAL | NO       | MED             | <a href="#">Edit   Inactivate</a> |
| EAST (ICU)                 | EAST         | 2013 DEMO HOSPITAL | NO       | MED             | <a href="#">Edit   Inactivate</a> |
| EN PCU                     | ENPCU        | 2013 DEMO HOSPITAL | NO       | SUR             | <a href="#">Edit   Inactivate</a> |
| EN WARD                    | ENW          | 2013 DEMO HOSPITAL | NO       | MED             | <a href="#">Edit   Inactivate</a> |
| INPATIENT                  | INPT         | 2013 DEMO HOSPITAL | NO       | MED             | <a href="#">Edit   Inactivate</a> |
| INTENSIVE CARE             | ICU          | 2013 DEMO HOSPITAL | NO       | ICU             | <a href="#">Edit   Inactivate</a> |

Figure 3-10: Wards listing

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

### 3.4.1 Search for a Ward

The **Wards** window of the **Settings** module lists all of the wards in the RPMS database. Each window of the display shows **10** wards. Use the **left** and **right arrows** or select a **number** at the lower-right corner of the window to navigate to other windows. The current window number is highlighted.

Use the **Filter by Wards** field in the upper-right corner of the window to narrow down your search for a specific ward. Type any part of a **ward name** in the field and press **Enter**. The filtered list of wards displays.

### 3.4.2 Add a New Ward

Click the **Add Ward** button in the upper-right corner of the **Wards** window to set up a new ward. The **Add Ward** dialog shown Figure 3-11 displays.

The screenshot shows the 'Add Ward' dialog box. It has a title bar 'Add Ward'. Below the title bar, there are several input fields arranged in a grid. The first row contains 'Name' (text box, required), 'Abbreviation' (text box, required), and 'Division' (dropdown menu, required). The second row contains 'ICU/SCU Ward' (checkbox) and 'Progressive Care Unit' (checkbox). The third row contains 'Nursing Service' (dropdown menu, required), 'Seriously Ill Ward' (dropdown menu), 'Print Order' (text box, required, with '0.000' entered), and 'A-Sheet Printer' (text box). At the bottom of the dialog are two buttons: 'Discard' and 'Save'.

Figure 3-11: Add Ward dialog

The **Add Ward** dialog displays the following information:

- Ward Name—Enter the name of the ward as it will be displayed on reports and in the **Ward Workspace**
- Abbreviation
- Division
- ICU/SCU Ward
- Progressive Care Unit
- Nursing Service
- Seriously Ill Ward
- Print Order
- A-Sheet Printer

Complete the **fields** of the dialog, as is appropriate for the **ward**.

Once complete, click **Save** to save the entries and close the dialog or click **Discard** to close the dialog without saving the entries.

### 3.4.3 Edit a Ward

Select a ward from the **Ward** window, as described in Section 3.4.1, then click **Edit** to the right of the ward name to edit the fields. This opens the **Ward Configuration** dialog as shown in Figure 3-12.

**Ward Configuration**

Name [required]  Abbreviation [required]  Division [required]

ICU/SCU Ward ☐ Progressive Care Unit ☐

Nursing Service [required]  Seriously Ill Ward  Print Order [required]  A-Sheet Printer

**Authorization Dates** Add

| AUTHORIZATION DATE | BED TYPE      | NUMBER OF BEDS |                                               |
|--------------------|---------------|----------------|-----------------------------------------------|
| 1/1/2016           | ADULT MEDICAL | 88             | <a href="#">Edit</a>   <a href="#">Remove</a> |
| 4/10/2016          | PEDS MEDICAL  | 18             | <a href="#">Edit</a>   <a href="#">Remove</a> |

Figure 3-12: Edit Ward dialog

Fill in the fields of the dialog, as is appropriate for the ward.

The **Ward Configuration** dialog also includes the **Authorized Dates** section and is detailed below.

### 3.4.3.1 Authorized Dates

The **Authorization Dates** section is displayed at the bottom of the **Ward Configuration** window 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 **Ward Configuration** to display the **Authorization Date** dialog (Figure 3-13).

**Authorization Date**

Authorization Date [required]   Bed Type [required]  Number Of Beds

Figure 3-13: Add/Edit Authorization Date dialog

This dialog includes these fields:

- Authorization Date

- Bed Type
- Number of Beds

After entering the **Authorization Date** dialog information, click **OK** to save the information, or click **Cancel** to close the dialog without saving the information.

Once all **Ward Configuration** edits are complete, click **Save** to save the ward configuration and close the dialog or click **Discard** to close the dialog without saving.

#### 3.4.4 Inactivate or Reactivate a Ward

Select a **ward** from the **Ward** window as described in Section 3.4.1 then click **Inactivate** to the right of the ward name to inactivate the ward. Wards that have active admissions cannot be inactivated. Similarly, use the **Reactivate** option to reactivate the **ward**. A confirmation message displays to the user. Click **OK** to continue or **Cancel** to discard the process.

## 4.0 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.

### 4.1 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.

Open the **Reports** module by clicking **Reports (lower left)**, as shown in Figure 4-1.

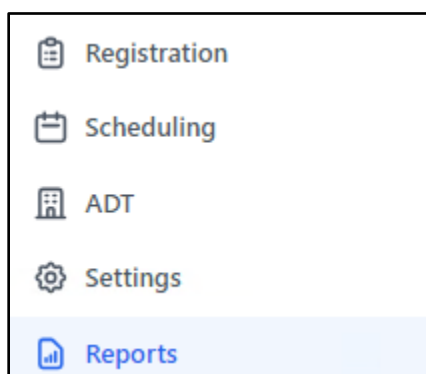


Figure 4-1: Accessing the Reports module

#### 4.1.1 Reports—Preview and Print Options

For every report in the **Reports** module, the user can view the report results in a couple of ways. After selecting the appropriate **report parameters**:

- Click **Preview** to view the report on the window.
- Click **Print** to print the report to an **RPMS Device** or to the **Browser**.

Figure 4-2 shows the **Preview** and **Print** options for all reports.

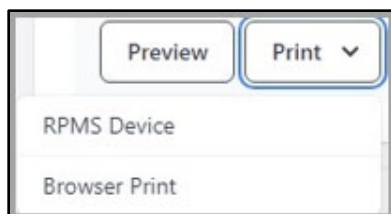


Figure 4-2: Preview and Print options

### 4.1.2 Reports–Page Selection

For every report in the **Reports** module, the user can utilize the following **Page Selection** buttons (Figure 4-3) to navigate through multi-page reports.

- Use the **middle arrows** (◀ ▶) to move through the report one page at a time.
- Use the **arrows with the bar** (◀| ▶|) to quickly go to the beginning or the end of the report.



Figure 4-3: Page Selection buttons

### 4.1.3 Reports–Zoom Options

For every report in the **Reports** module, the user can utilize the following **Zoom In** and **Zoom Out** functions (Figure 4-4) to perform those functions within the page view of the report.

- Use the ◯ and ⊕ buttons to manually adjust the report view.
- Use the **100% picklist** option to set a specific report view (includes **Fit Page** and **Fit Width**).



Figure 4-4: Zoom buttons

## 4.2 ADT Report Types

Once the **Reports** module is open, a listing of the available admission, discharge, and transfer-related reports displays as shown in Figure 4-5.



Figure 4-5: ADT Reports list

Select any report name to open that report. After opening a report, you must provide additional parameters (such as Start and End dates, Status, Sort By, etc.) in order to view the report. Before a user can print the report, the user must click **Preview** first. Users can print through an RPMS printer device or through the browser. Refer to the *BPRM Application Overview User Manual* for more information.

## 4.2.1 Admissions & Discharges Sheet

The **Admissions & Discharges Sheet** shows statistical data relating to admissions and discharges at a facility.

### 4.2.1.1 Admission & Discharge Sheet Parameters

The **Admissions & Discharges Sheet** has fields for these parameters:

- Date
- Type

Figure 4-6 shows the parameters of the **Admissions & Discharges Sheet**.

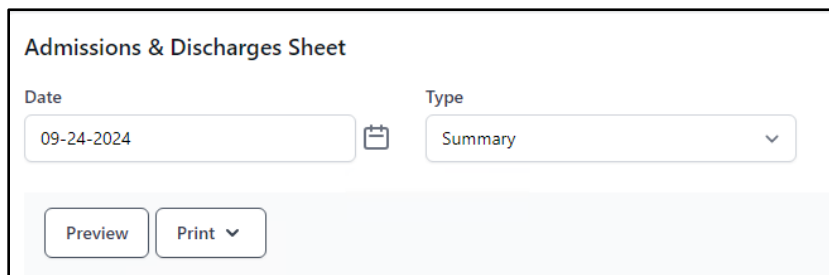
The screenshot shows a web form titled "Admissions & Discharges Sheet". It contains two input fields: "Date" with a calendar icon and a dropdown arrow, and "Type" with a dropdown arrow. The "Date" field is set to "09-24-2024" and the "Type" field is set to "Summary". Below these fields are two buttons: "Preview" and "Print" with a dropdown arrow.

Figure 4-6: Admissions & Discharges Sheet parameters

The **Admissions & Discharges Sheet** requires a **Date** for the date you want reflected in the report. By default, the **Date** is set to the current day.

The **Admissions & Discharges Sheet** includes two versions of the report. The **Type** field offers the following options for the type of report to display:

- Summary
- Detail

After selecting the appropriate report parameters, click **Preview** to view the report.

#### IMPORTANT NOTE:

When the user runs the Admissions & Discharges Sheet, the recalculation will automatically run in the background (if it has NOT been run in the last 24 hours).

**Note:** The following alert (Figure 4-7) displays if there is no data to display since the recalculation is needed to be done for the selected date in RPMS.

The screenshot shows the 'Admissions & Discharges Sheet' interface. At the top, there is a 'Date' field with the value '10-14-2024' and a 'Type' dropdown menu set to 'Summary'. Below these fields are 'Preview' and 'Print' buttons. A navigation bar at the bottom of the interface shows '1 of 1' pages and a '97%' zoom level. The main content area displays a warning message: 'No data to print. 'Recalculate Census Totals' has been initiated because Census data does not exist for date: 10/14/2024 and Facility: 2021 DEMO HOSPITAL (INST). Please run the report again in a few minutes.'

Figure 4-7: Admissions & Discharges Sheet warning message example

#### 4.2.1.2 Information on the Admissions & Discharges Sheet

The **Admissions & Discharges Sheet** 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

Figure 4-8 shows an example of a typical **Admissions & Discharges Sheet (Summary)**.

Admissions & Discharges Sheet

Date: 10-14-2024 Type: Summary

Preview Print

1 of 1 100%

TW \*\*\*Confidential Patient Data Covered by Privacy Act\*\*\*  
 Oct 15, 2024 ADMISSIONS & DISCHARGES for 2021 DEMO HOSPITAL (INST) Page: 1  
 10:54 AM For Monday 10/14/24

| SERVICE                 | REMAINING<br>(Prev Day) | ADMIT | TRANSFERS<br>IN OUT | DEATHS | DISCH | REMAINING |
|-------------------------|-------------------------|-------|---------------------|--------|-------|-----------|
| ED BOARDER OBSERVATION  | -1                      | 1     | 0 0                 | 0      | 0     | 0         |
| GENERAL MEDICINE        | 0                       | 2     | 0 0                 | 0      | 5     | -3        |
| GENERAL SURGERY         | 0                       | 1     | 0 0                 | 0      | 1     | 0         |
| MENTAL HEALTH OBSERVATI | 0                       | 0     | 0 0                 | 0      | 0     | 0         |
| NURSE-MIDWIFERY SERVICE | 0                       | 0     | 0 0                 | 0      | 0     | 0         |
| OBSTETRICS              | 0                       | 0     | 0 0                 | 0      | 0     | 0         |
| PEDIATRICS              | 0                       | 0     | 0 0                 | 0      | 0     | 0         |
| PEDIATRICS OBSERVATION  | 1                       | 0     | 0 0                 | 0      | 0     | 1         |
| SURGERY OBSERVATION     | 0                       | 0     | 0 0                 | 0      | 0     | 0         |
| Inpatient Totals:       | 0                       | 3     | 0 0                 | 0      | 6     | -3        |
| Observation Totals:     | 0                       | 1     | 0 0                 | 0      | 0     | 1         |
| Total:                  | 0                       | 4     | 0 0                 | 0      | 6     | -2        |

|                        |      |        |              |                        |      |        |             |
|------------------------|------|--------|--------------|------------------------|------|--------|-------------|
| Inpatient Admissions   |      |        |              | Inpatient Discharges   |      |        |             |
| GM                     | EAST | 223344 | DEMO,ANGELA  | SUR                    | WEST | 852555 | TEST,AMELIE |
| GM                     | CZW  | 445577 | TEST,ANN     | GM                     | CZW  | 445577 | TEST,ANN    |
| GM                     | WEST | 113388 | TEST,JASON   | GM                     | WEST | 113388 | TEST,JASON  |
| Observation Admissions |      |        |              | Observation Discharges |      |        |             |
| EDO                    | CZW  | 76907  | DEMO,ADULT A |                        |      |        |             |

Figure 4-8: Admissions & Discharges Sheet (Summary) example

Figure 4-9 shows an example of a typical **Admissions & Discharges Sheet (Detail)**.

Admissions & Discharges Sheet

Date: 10-14-2024 Type: Detail

Preview Print

1 of 1 100%

Confidential Patient Data Covered by Privacy Act  
ADMISSIONS & DISCHARGES for 2021 DEMO HOSPITAL (INST)

Monday 10/14/24

Inpatients: -3 Observations: 1 Day Surgeries: 0 Newborns: 0

| NAME                             | HRCN   | AGE | COMMUNITY   | WARD | SERV | PROVIDER          | PRIM CARE PRV |
|----------------------------------|--------|-----|-------------|------|------|-------------------|---------------|
| <b>Inpatient Admissions: 3</b>   |        |     |             |      |      |                   |               |
| DEMO, ANGELA                     | 223344 | 24  | ALBUQUERQUE | EAST | GM   | DEMO, PROVIDER MN |               |
| TEST, ANN                        | 445577 | 60  | GALLUP      | CZW  | GM   | DEMO, PROVIDER MN |               |
| TEST, JASON                      | 113388 | 15  | GALLUP      | WEST | GM   | DEMO, PROVIDER MN | TEST, RCIS    |
| <b>Observation Admissions: 1</b> |        |     |             |      |      |                   |               |
| DEMO, ADULT A                    | 76907  | 54  | ABBEVILLE   | CZW  | EDO  | DEMO, PROVIDER MN |               |
| <b>Inpatient Discharges: 6</b>   |        |     |             |      |      |                   |               |
| TEST, AMELIE                     | 852555 | 23  | SAN DIEGO   | WEST | SUR  | DEMO, DOCTOR      |               |
| TEST, ANN                        | 445577 | 60  | GALLUP      | CZW  | GM   | DEMO, DOCTOR      |               |
| TEST, JASON                      | 113388 | 15  | GALLUP      | WEST | GM   | DEMO, DOCTOR      | TEST, RCIS    |

Figure 4-9: Admissions &amp; Discharges Sheet (Detail) example

## 4.2.2 Current Inpatient List

The **Current Inpatient List** shows all current inpatients for the selected ward (or wards) or an alphabetical list by patient name.

### 4.2.2.1 Current Inpatient List Parameters

The **Current Inpatient List** has fields for these parameters:

- Report Type.
- Wards (if **Ward and Room** are selected as the **Report Type**).

Figure 4-10 shows the parameters of the **Current Inpatient List**.



Figure 4-10: Current Inpatient List parameters

The **Current Inpatient List** includes two versions of the report. The **Report Type** field offers the following options for the type of report to display:

- Ward and Room
- Patient

When choosing the **Ward and Room** report type, the **Wards** field offers various wards for the user to choose from or you can choose **<All>** to quickly select all of them.

After selecting the appropriate report parameters, click **Preview** to view the report.

#### 4.2.2.2 Information on the Current Inpatient List

The **Current Inpatient List** varies with the multiple report types but mainly includes the following information for each patient:

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

Figure 4-11 shows an example of a typical **Current Inpatient List (Ward and Room)**.

**Current Inpatient List**

Report Type: Ward and Room      Wards: INPATIENT

Preview    Print

1 of 3    100%

Confidential Patient Data Covered by Privacy Act  
 2013 DEMO HOSPITAL  
 Current Inpatients by Ward  
 Page: 1  
 Nov 04, 2022      \*\*\* INPATIENT\*\*\*

| Room  | Patient                             | Chart #  | Age    | LOS  | Service                            |
|-------|-------------------------------------|----------|--------|------|------------------------------------|
| 100-1 |                                     |          |        |      |                                    |
| 101-1 | DEMO,DEJON<br>(DEMO,DOCTOR)         | 11-55-69 | 31 YRS | 25   | INTERNAL MED OBSERVATI<br>(PARKER) |
| 101-2 |                                     |          |        |      |                                    |
| 102-1 | BPRM-ADT,ENONE<br>(DEMO,DOCTOR)     | 34-50-78 | 67 YRS | 38   | GENERAL MEDICINE<br>(SAN ANDREAS)  |
| 102-2 | DEMO,BCMAONE<br>(DEMO,DOCTOR)       | 14-75-13 | 46 YRS | 25   | GENERAL MEDICINE<br>(PASSADUMKEAG) |
| 103-1 | COMONEONEONE,TAC<br>(DEMO,DOCTOR)   | 91-11-03 | 23 YRS | 1134 | GENERAL MEDICINE<br>(PUEBLO)       |
| 103-2 | CMSONEFIVEFIVE,TAF<br>(DEMO,DOCTOR) | 14-73-41 | 12 YRS | 821  | GENERAL MEDICINE<br>(GALLUP)       |

Figure 4-11: Current Inpatient List (Ward and Room) example

Figure 4-12 shows an example of a typical **Current Inpatient List (Ward and Room)**.

Current Inpatient List

Report Type  
Patient

Preview Print

12:05 PM Confidential Patient Data Covered by Privacy Act  
Nov 04, 2022 Alphabetical List of Current Inpatients KXS

| Patient<br>Ward (Room)                           | HRCN<br>Srv    | Age<br>Provider      | Community<br>Provider | Insurance<br>Admit Date (LOS) |
|--------------------------------------------------|----------------|----------------------|-----------------------|-------------------------------|
| BPRM,CZSIX<br>Admitted to CW                     | 12-12-34<br>GM | 49 YR<br>DEMO,DOCTOR | SAN DIEGO             | PVT<br>on 09/22/22(43 days)   |
| BPRM,CZTRIBAL<br>Admitted to CW                  | 03-17-55<br>GM | 44 YR<br>DEMO,DOCTOR | SAN DIEGO             | RR/<br>on 07/01/22(126 days)  |
| BPRM,CZTRIBALTWO<br>Admitted to CW (CW-8)        | 00-23-47       | 57 YR<br>SAN DIEGO   |                       | PVT<br>on 09/28/22(37 days)   |
| BPRM,CZTWO<br>Admitted to CS (CS-B)              | 88-88-81<br>GM | 77 YR<br>DEMO,DOCTOR | SAN DIEGO             | MCR<br>on 10/29/21(371 days)  |
| BPRM,CZWIRSTBAND<br>Admitted to INPT (107-2)SURO | 02-75-90       | 41 YR<br>DEMO,DOCTOR | SAN DIEGO             | IHS<br>on 07/21/22(2540 hrs)  |
| BPRM,DIVOFFTWO<br>Admitted to CTGH (CZ-100GM     | 00-00-0        | 67 YR<br>DEMO,DOCTOR | SAN DIEGO             | IHS<br>on 10/01/22(34 days)   |
| BPRM,EN ESTER<br>Admitted to ENW (ENW-004PED     | 00-34-54       | 87 YR<br>DEMO,DOCTOR | TEMECULA              | PVT<br>on 09/19/22(46 days)   |

Figure 4-12: Current Inpatient List (Patient) example

### 4.2.3 Discharges by Date Report

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

#### 4.2.3.1 Discharges by Date Report Parameters

The **Discharges by Date** report has fields for these parameters:

- Sort By
- Start Date
- End Date
- Wards (if **Ward** is selected as the **Sort By**)

Figure 4-13 shows the parameters of the **Discharges by Date** report.

The screenshot shows a web interface for the 'Discharges by Date' report. It features four input fields: 'Sort By' (a dropdown menu showing 'Ward'), 'Start' (a date field showing '09-10-2022'), 'End' (a date field showing '10-10-2022'), and 'Wards' (a dropdown menu showing 'All'). Below these fields are two buttons: 'Preview' and 'Print'.

Figure 4-13: Discharges by Date report parameters

The **Discharges by Date** report includes multiple versions of the report. The **Sort By** field offers the following options for the type of report to display:

- Date Only
- Ward
- Patient Name

When choosing the **Ward** sort type, the **Wards** field offers various wards for the user to choose from or you can choose **<All>** to quickly select all of them.

The **Discharges by Date Report** requires a **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the **Start Date** is set to **Today-30 days** and the **End Date** is set to the **current day**.

After selecting the appropriate report parameters, click **Preview** to view the report.

#### 4.2.3.2 Information on the Discharges by Date Report

The **Discharges by Date Report** varies with the multiple report types but mainly includes the following information for each patient:

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

Figure 4-14 shows an example of a typical **Discharges by Date report (Date Only)**.

Discharges by Date

Sort By: Date Only (v) Start: 10-01-2022 (calendar icon) End: 10-30-2022 (calendar icon)

Preview Print (v)

< < > > 1 of 3 100%

KXS \*\*\*Confidential Patient Data Covered by Privacy Act\*\*\*  
 Nov 04, 2022 Discharges by Date Page: 1  
 1:13 PM Sorted by Date  
 For Oct 01, 2022 through Oct 30, 2022

| Patient Name                                 | Chart # | Admission Dates         | LOS | Serv  | Ward |
|----------------------------------------------|---------|-------------------------|-----|-------|------|
| DEMO,HANNA                                   | 133671  | 09/30/2022 - 10/03/2022 | 3   | GM    | EAST |
| (Attending: DEMO,DOCTOR Dx: STOMACH PAIN)    |         |                         |     |       |      |
| DEMO,HANNA                                   | 128320  | 10/03/2022 - 10/03/2022 | 1   | GM    | EAST |
| (Attending: DEMO,DOCTOR Dx: Sick)            |         |                         |     |       |      |
| DEMO,HANNA                                   | 876     | 09/14/2020 - 10/03/2022 | 749 | GM    | INPT |
| (Attending: DEMO,DOCTOR Dx: test)            |         |                         |     |       |      |
| BPRM,EN'KID                                  | 384958  | 09/30/2022 - 10/03/2022 | 3   | PED   | ENW  |
| (Attending: DEMO,DOCTOR Dx: test)            |         |                         |     |       |      |
| BPRM,TOTTHREE                                | 6777    | 10/03/2022 - 10/03/2022 | 1   | GM    | INPT |
| (Attending: DEMO,DOCTOR Dx: Sick)            |         |                         |     |       |      |
| BPRM,MINION                                  | T76907  | 09/26/2022 - 10/03/2022 | 7   | IMEDO | CW   |
| (Attending: DEMO,DOCTOR Dx: TEMP hrn)        |         |                         |     |       |      |
| BPRM,ENMINIZOE                               | 569856  | 09/05/2022 - 10/03/2022 | 28  | GM    | ENW  |
| (Attending: DEMO,DOCTOR Dx: pain in the leg) |         |                         |     |       |      |

Figure 4-14: Discharges by Date Report (Date Only) example

Figure 4-15 shows an example of a typical **Discharges by Date Report (Ward)**.

**Discharges by Date**

Sort By: Ward Start: 09-01-2022 End: 09-30-2022 Wards: All

Preview Print

1 of 3 100%

\*\*\*Confidential Patient Data Covered by Privacy Act\*\*\*

Nov 04, 2022 Discharges by Date Page: 1  
1:22 PM Sorted by Ward  
For Sep 01, 2022 through Sep 30, 2022

| Patient Name                                  | Chart # | Admission Dates         | LOS | Serv  | Ward |
|-----------------------------------------------|---------|-------------------------|-----|-------|------|
| *** CZ ICU WARD ***                           |         |                         |     |       |      |
| BPRM,CZTEN                                    | T76905  | 09/23/2022 - 09/26/2022 | 3   | GM    | CIW  |
| (Attending: DEMO,DOCTOR Dx: testing testing ) |         |                         |     |       |      |
| BPRM,CZBENEFITS                               | 654455  | 09/22/2022 - 09/28/2022 | 6   | IMEDO | CIW  |
| (Attending: DEMO,DOCTOR Dx: TEST)             |         |                         |     |       |      |
| BAIRD,SHEILA MARIE                            | 124907  | 09/23/2022 - 09/28/2022 | 5   | IMEDO | CIW  |
| (Attending: DEMO,DOCTOR Dx: stest)            |         |                         |     |       |      |
| ZAVALA,CHERRY PIE                             | 654555  | 09/28/2022 - 09/30/2022 | 2   | GM    | CIW  |
| (Attending: DEMO,DOCTOR Dx: side pain)        |         |                         |     |       |      |
| *** CZ WARD ***                               |         |                         |     |       |      |
| POTTER,NATAANI                                | 125257  | 08/10/2022 - 09/27/2022 | 48  | GM    | CW   |
| (Attending: DEMO,DOCTOR Dx: testing)          |         |                         |     |       |      |
| BPRM,CZNONSENSITIVE                           | 1983    | 09/28/2022 - 09/30/2022 | 2   | GM    | CW   |
| (Attending: DEMO,DOCTOR Dx: chest pain)       |         |                         |     |       |      |

Figure 4-15: Discharges by Date Report (Ward) example

Figure 4-16 shows an example of a typical **Discharges by Date Report (Patient Name)**.

Discharges by Date

Sort By: Patient Name ▼ Start: 09-01-2022 End: 09-30-2022

Preview Print ▼

1 of 4 100%

KXS \*\*\*Confidential Patient Data Covered by Privacy Act\*\*\*  
 Nov 04, 2022 Discharges by Date Page: 1  
 1:27 PM Sorted by Patient Name  
 For Sep 01, 2022 through Sep 30, 2022

| Patient Name                                                 | Chart # | Admission Dates                             | LOS | Serv  | Ward |
|--------------------------------------------------------------|---------|---------------------------------------------|-----|-------|------|
| *** DEMO,HANNA ***<br>DEMO,HANNA<br>(Attending: DEMO,DOCTOR) | 138972  | 09/23/2022 - 09/26/2022<br>Dx: Stomach ache | 3   | PED   | TW1  |
| *** DEMO,HANNA ***<br>DEMO,HANNA<br>(Attending: DEMO,DOCTOR) | 142450  | 09/27/2022 - 09/29/2022<br>Dx: knee pain    | 2   | SURO  | TW1  |
| *** DEMO,HANNA ***<br>DEMO,HANNA<br>(Attending: DEMO,DOCTOR) | 124907  | 09/23/2022 - 09/28/2022<br>Dx: stest        | 5   | IMEDO | CIW  |
| *** DEMO,HANNA ***<br>DEMO,HANNA<br>(Attending: DEMO,DOCTOR) | 101072  | 09/28/2022 - 09/29/2022<br>Dx: headache     | 1   | GM    | TW1  |

Figure 4-16: Discharges by Date Report (Patient Name) example

## 4.2.4 Incomplete Chart List by Provider Report

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

### 4.2.4.1 Incomplete Chart List by Provider Report Parameters

The **Incomplete Chart List by Provider** has fields for these parameters:

- Provider
- Visit Types
- Report Type

Figure 4-17 shows the parameters of the **Incomplete Chart List by Provider Report**.

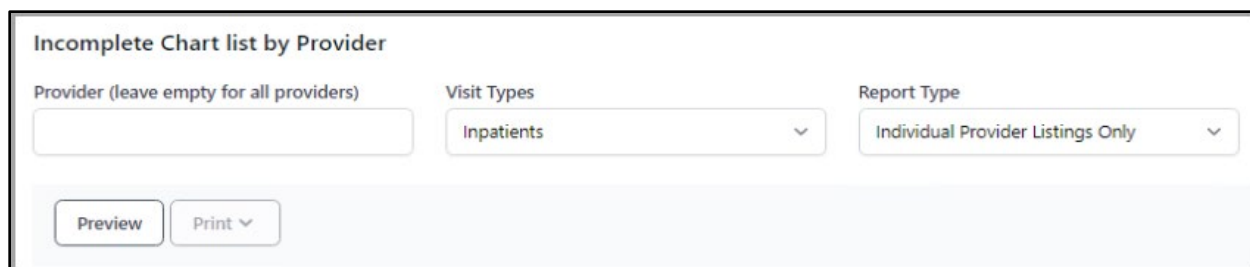
The screenshot shows a web form titled "Incomplete Chart list by Provider". It contains three main input fields: "Provider (leave empty for all providers)" which is a text box; "Visit Types" which is a dropdown menu currently showing "Inpatients"; and "Report Type" which is a dropdown menu currently showing "Individual Provider Listings Only". Below these fields are two buttons: "Preview" and "Print" with a small downward arrow.

Figure 4-17: Incomplete Chart List by Provider Report parameters

When choosing a **Provider**, you can type some or all of the name, using a **LAST, FIRST** name format. Leave this parameter empty for **<All>** Providers.

The **Visit Types** field offers various options for the user to choose from or you can choose **<All>** to quickly select all of them.

The **Report Type** field offers the following options for the user to choose from or you can choose **<All>** to quickly select all of them.

- Individual Provider Listings Only
- Summary Page Only
- Both

After selecting the appropriate report parameters, click **Preview** to view the report.

#### 4.2.4.2 Information on the Incomplete Chart List by Provider Report

The **Incomplete Chart List by Provider Report** includes two versions of the report.

The **Incomplete Chart List by Provider Report (Individual Provider Listings only)** shows patient information along with the total number of incomplete charts, delinquent charts and deficiency categories for each provider selected.

Figure 4-18 shows an example of a typical **Incomplete Chart List by Provider Report (Individual Provider Listings only)**.

**Incomplete Chart list by Provider**

Provider (leave empty for all providers)  Visit Types  Report Type

2:47 PM Confidential Patient Data Covered by Privacy Act KXS  
Nov 04, 2022 Incomplete Charts by Provider Page: 1  
Inpatients

| Patient                             | HRCN   | Date     | Type | Deficiencies         | Days |
|-------------------------------------|--------|----------|------|----------------------|------|
| -----                               |        |          |      |                      |      |
| Incomplete Charts for DEMO,DOCTOR   |        |          |      |                      |      |
| TEST,AMY                            | 679458 | 02/22/22 | INP  | *CONSULTATION REPORT | 255  |
| BPRM,CZNONSENSITIVE                 | 1983   | 09/30/22 | INP  | *PROGRESS NOTES      | 35   |
|                                     |        |          |      | *CONSULTATION REPORT | 35   |
| TEST,AMY                            | 139715 | 10/04/22 | INP  | *PROGRESS NOTES      | 31   |
| Total Delinquent Charts: 3          |        |          |      |                      |      |
| Total Incomplete Charts: 3          |        |          |      |                      |      |
| Incomplete/Delinquent for Signature |        |          |      | 4                    |      |

Figure 4-18: Incomplete Chart List by Provider Report (Individual Provider Listings) example

The **Incomplete Chart List by Provider Report (Summary Page only)** shows only the total number of incomplete charts, delinquent charts and deficiency categories for each provider selected.

Figure 4-19 shows an example of a typical **Incomplete Chart List by Provider Report (Summary Page only)**.

Incomplete Chart list by Provider

Provider (leave empty for all providers)  Visit Types  Report Type

3:08 PM Confidential Patient Data Covered by Privacy Act KXS  
Nov 04, 2022 Incomplete Charts by Provider Page: 2  
Inpatients

=====

SUMMARY PAGE

| PROVIDER      | INCOMP<br>CHARTS | DELINQ<br>CHARTS | DEFICIENCY CATEGORIES |        |      |     |
|---------------|------------------|------------------|-----------------------|--------|------|-----|
|               |                  |                  | A SHEET               | OP RPT | SUMM | SIG |
| =====         |                  |                  |                       |        |      |     |
| DEMO,DOCTOR   | 3                | 3                | 0                     | 0      | 0    | 4   |
| DEMO,DOCTOR2  | 1                | 1                | 1                     | 0      | 0    | 0   |
| DEMO,DOCTOR3  |                  | 1                | 1                     | 0      | 1    | 1   |
| DEMO,DOCTOR4  | 1                | 1                | 0                     | 0      | 0    | 0   |
| DEMO,DOCTOR5  | 2                | 0                | 1                     | 0      | 0    | 0   |
| DEMO,DOCTOR6  |                  | 2                | 1                     | 0      | 1    | 4   |
| =====         |                  |                  |                       |        |      |     |
| # DISCHARGES: | 9                | 7                | 4                     | 0      | 2    | 6   |
| =====         |                  |                  |                       |        |      |     |

Figure 4-19: Incomplete Chart List by Provider Report (Summary Page only) example

## 4.2.5 Inpatient Coding Status Report

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

### 4.2.5.1 Inpatient Coding Status Report Parameters

The **Inpatient Coding Status Report** has fields for these parameters:

- Start Date
- End Date

Figure 4-20 shows the parameters of the **Inpatient Coding Status Report**.

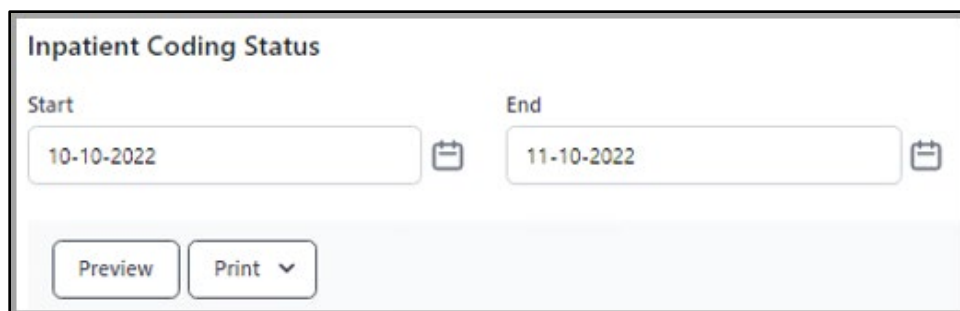
The screenshot shows a web form titled "Inpatient Coding Status". It has two date input fields: "Start" with the value "10-10-2022" and "End" with the value "11-10-2022". Each date field has a calendar icon to its right. Below the date fields are two buttons: "Preview" and "Print" with a dropdown arrow.

Figure 4-20: Inpatient Coding Status Report parameters

The **Inpatient Coding Status Report** requires a **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the **Start Date** is set to the current day and the **End Date** is set to **Today+30 days**.

After selecting the appropriate report parameters, click **Preview** to view the report.

#### 4.2.5.2 Information on the Inpatient Coding Status Report

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 4-21 shows an example of a typical **Inpatient Coding Status Report**.

**Inpatient Coding Status**

Start: 10-01-2024 End: 10-15-2024

Preview Print

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**INPATIENT CODING STATUS REPORT**  
 Confidential Patient Data Covered by Privacy Act  
 2021 DEMO HOSPITAL (INST)  
 Oct 2024 to Oct 2024

| Month/Year | # Disch | # Coded | # Not-Coded | # Exported | # Errors |
|------------|---------|---------|-------------|------------|----------|
| Oct 2024   | 6       | 0       | 6           | 0          | 0        |
|            | 6       | 0       | 6           | 0          | 0        |

| Admit & Discharge Dates | Patient Name      | Chart # | Srv | Insurance |
|-------------------------|-------------------|---------|-----|-----------|
| 10/14/2024 10/14/2024   | TEST, ANN         | 445577  | GM  | PVT       |
| 10/14/2024 10/14/2024   | TEST, JASON       | 113388  | GM  | IHS       |
| 05/20/2024 10/14/2024   | TEST, CARL        | 147136  | GM  | MCR       |
| 11/04/2022 10/14/2024   | BPRM, ENVET       | 328392  | GM  | MCR       |
| 10/21/2022 10/14/2024   | TEST, BABY VITALS | 777771  | GM  | IHS       |
| 03/16/2023 10/14/2024   | DEMO, JACK        | 888778  | SUR | IHS       |

Figure 4-21: Inpatient Coding Status Report example

## 4.2.6 Inpatient Services by Date Range (HSA-202-1) Report

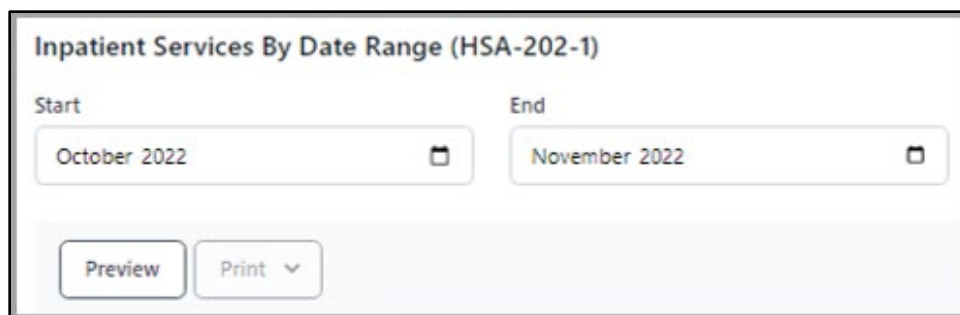
The **Inpatient Services by Date Range (HSA-202-1) Report** shows various census over a specified range of dates.

### 4.2.6.1 Inpatient Services by Date Range (HSA-202-1) Report Parameters

The **Inpatient Services by Date Range (HSA-202-1) Report** has fields for these parameters:

- Start Date
- End Date

Figure 4-22 shows the parameters of the **Inpatient Services by Date Range (HSA-202-1) Report**.



The screenshot shows a web-based form titled "Inpatient Services By Date Range (HSA-202-1)". Below the title, there are two date selection fields. The "Start" field is set to "October 2022" and the "End" field is set to "November 2022". Both fields have a calendar icon to their right. Below these fields, there are two buttons: "Preview" and "Print" with a dropdown arrow.

Figure 4-22: Inpatient Services by Date Range (HSA-202-1) report parameters

The **Inpatient Services by Date Range (HSA-202-1) Report** requires a **Start Date** and **End Date** for the period of time you want reflected in the report. By default, the **Start Date** is set to the current month and the **End Date** is set to next month.

After selecting the appropriate report parameters, click **Preview** to view the report.

#### 4.2.6.2 Information on the Inpatient Services by Date Range (HSA-202-1) Report

The **Inpatient Services by Date Range (HSA-202-1) 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 4-23 and Figure 4-24 show an example of a typical **Inpatient Services by Date Range (HSA-202-1) report**–(Part I and Part II).

Inpatient Services By Date Range (HSA-202-1)

Start: October 2022      End: November 2022

Preview    Print ▾

---

1 of 2    100%

RANGE OF MONTHS REPORT FOR INPATIENT SERVICES

---

Name and Location of Hospital: 2013 DEMO HOSPITAL ALBUQUERQUE, NEW MEXICO      Month and Year: Oct 2022 to Nov 2022

---

Part I - Service and Census

---

| Medical Services Provided  | Bom<br>Bom<br>Census | Adm    | Discharges |       | Eom<br>Eom<br>Census | Inpatient<br>Inpt<br>Days |
|----------------------------|----------------------|--------|------------|-------|----------------------|---------------------------|
|                            |                      |        | Death      | Other |                      |                           |
| MEDICAL & SURGICAL (Adult) | 0                    | 1      | 0          | 1     | 0                    | 1                         |
| MEDICAL & SURGICAL (Ped.)  | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| OBSTETRIC                  | 0                    | 1      | 0          | 0     | 0                    | -1                        |
| TUBERCULOSIS               | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| ALCOHOLISM/SUBSTANCE ABUSE | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| MENTAL HEALTH              | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| <b>TOTAL</b>               | 0                    | 2      | 0          | 1     | 0                    | 0                         |
| NEWBORN                    | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| SWING BEDS                 | 0                    | 1 (3t) | 0          | 1     | 1                    | 5                         |
| OBSERVATIONS               | 0                    | 0      | 0          | 0     | 0                    | 0                         |
| DAY SURGERY                | 0                    | 0      | 0          | 0     | 0                    | 0                         |

Figure 4-23: Inpatient Services by Date Range (HSA-202-1) report (Part I) example

Inpatient Services By Date Range (HSA-202-1)

Start: October 2022      End: November 2022

Preview    Print ▾

---

2 of 2    100%

Part II - Special Information

---

Peak Census, Excluding Newborn..... 1  
Minimum Census, Excluding Newborn..... 0

Figure 4-24: Inpatient Services by Date Range (HSA-202-1) report (Part II) example

Figure 4-25 shows an example of a typical **Inpatient Services by Date Range (HSA-202-1) Report--(Part III)**.

Inpatient Services By Date Range (HSA-202-1)

Start:  End:

2 of 2 100%

| Part III<br>Beds Available |           |          | Comments                  |
|----------------------------|-----------|----------|---------------------------|
| STAFF UNITS                | # of Beds | % Occup. |                           |
| MEDICAL (Adult)            | 331       |          | ALOS: ADULT MED/SUR: 0.00 |
| SURGICAL (Adult)           | 8         |          | PEDS MED/SUR: 0.00        |
| Subtotal                   | 339       | 0%       | NEWBORN: 0.00             |
| MEDICAL (Pediatric)        | 18        |          |                           |
| SURGICAL (Pediatric)       | 0         |          | ADPL: ADULT MED/SUR: 0.00 |
| Subtotal                   | 18        | 0%       | PEDS MED/SUR: 0.00        |
| OBSTETRIC                  | 10        | 0%       | NEWBORN: 0                |
| TUBERCULOSIS               | 4         | 0%       | 1 DAY PAT ADULT M/S: 1    |
| ALCOHOL/SUBSTANCE ABUSE    | 0         | 0%       | PEDS M/S: 0               |
| MENTAL HEALTH              | 11        | 0%       | NEWBORN: 0                |
| ICU/SCU                    | 77        | 0%       | ICU/SCU PATIENT DAYS: -1  |
| PCU                        | 0         | 0%       | PCU PATIENT DAYS: 0       |
| Total                      | 459       |          | NON-BENEFICIARIES:        |
| NEWBORN                    | 2         | 0%       | # Discharged: 2           |
|                            |           |          | With total LOS of 25 days |
|                            |           |          | % OF OCCUPANCY: 0.00%     |

| Name of SUD | Signature Of SUD | Date |
|-------------|------------------|------|
|-------------|------------------|------|

Figure 4-25: Inpatient Services by Date Range (HSA-202-1) report (Part III) example

## 4.2.7 Inpatient Services by Month (HSA-202-1) Report

The **Inpatient Services by Month (HSA-202-1) Report** shows various census totals for reporting purposes. The totals can be run for inpatient services provided over a specified range of dates.

### 4.2.7.1 Inpatient Services by Month (HSA-202-1) Report Parameters

The **Inpatient Services by Month (HSA-202-1) Report** has a field for this parameter:

- Month

Figure 4-26 shows the parameters of the **Inpatient Services by Month (HSA-202-1)** report.



Figure 4-26: Inpatient Services by Month (HSA-202-1) report parameters

The **Inpatient Services by Month (HSA-202-1)** report requires a **Month** for the period of time you want reflected in the report. By default, the **Month** is set to the current month.

After selecting the **appropriate report parameters**, click **Preview** to view the report.

#### 4.2.7.2 Information on the Inpatient Services by Month (HSA-202-1) Report

The **Inpatient Services by Month (HSA-202-1)** 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 4-27 shows an example of a typical **Inpatient Services by Month (HSA-202-1) report–(Part I)**.

**Inpatient Services By Month (HSA-202-1)**

Month  
October 2022

Preview Print

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**MONTHLY REPORT OF INPATIENT SERVICES IHS HOSPITALS**

Name and Location of Hospital: 2013 DEMO HOSPITAL ALBUQUERQUE, NEW MEXICO  
Month and Year: Oct 2022

**Part I - Service and Census**

| Medical Services Provided  | Bom<br>Census | Adm    | Discharges<br>Death | Other | Eom<br>Census | Inpatient<br>Inpt<br>Days |
|----------------------------|---------------|--------|---------------------|-------|---------------|---------------------------|
| MEDICAL & SURGICAL (Adult) | 0             | 1      | 0                   | 1     | 0             | 1                         |
| MEDICAL & SURGICAL (Ped.)  | 0             | 0      | 0                   | 0     | 0             | 0                         |
| OBSTETRIC                  | 0             | 1      | 0                   | 0     | 0             | -1                        |
| TUBERCULOSIS               | 0             | 0      | 0                   | 0     | 0             | 0                         |
| ALCOHOLISM/SUBSTANCE ABUSE | 0             | 0      | 0                   | 0     | 0             | 0                         |
| MENTAL HEALTH              | 0             | 0      | 0                   | 0     | 0             | 0                         |
| <b>TOTAL</b>               | 0             | 2      | 0                   | 1     | 0             | 0                         |
| NEWBORN                    | 0             | 0      | 0                   | 0     | 0             | 0                         |
| SWING BEDS                 | 0             | 1 (3t) | 0                   | 1     | 1             | 5                         |
| OBSERVATIONS               | 0             | 0      | 0                   | 0     | 0             | 0                         |
| DAY SURGERY                | 0             | 0      | 0                   | 0     | 0             | 0                         |

Figure 4-27: Inpatient Services by Month (HSA-202-1) Report (Part I) example

Figure 4-28 shows an example of a typical **Inpatient Services by Month (HSA-202-1) report–(Part II)**.

**Inpatient Services By Month (HSA-202-1)**

Month  
October 2022

Preview Print

1 of 2 100%

**Part II - Special Information**

Peak Census, Excluding Newborn..... 1  
Minimum Census, Excluding Newborn.....0

Figure 4-28: Inpatient Services by Month (HSA-202-1) Report (Part II)

Figure 4-29 shows an example of a typical **Inpatient Services by Month (HSA-202-1) report–(Part III)**.

**Inpatient Services By Month (HSA-202-1)**

Month  
October 2022

Preview Print

2 of 2 100%

| Part III<br>Beds Available |                  |          | Comments                  |
|----------------------------|------------------|----------|---------------------------|
| STAFF UNITS                | # of Beds        | % Occup. |                           |
| MEDICAL (Adult)            | 331              |          | ALOS: ADULT MED/SUR: 0.00 |
| SURGICAL (Adult)           | 8                |          | PEDS MED/SUR: 0.00        |
| Subtotal                   | 339              | 0%       | NEWBORN: 0.00             |
| MEDICAL (Pediatric)        | 18               |          |                           |
| SURGICAL (Pediatric)       | 0                |          | 1 DAY PAT ADULT M/S: 1    |
| Subtotal                   | 18               | 0%       | PEDS M/S: 0               |
|                            |                  |          | NEWBORN: 0                |
| OBSTETRIC                  | 10               | 0%       |                           |
| TUBERCULOSIS               | 4                | 0%       | ICU/SCU PATIENT DAYS: -1  |
| ALCOHOL/SUBSTANCE ABUSE    | 0                |          | PCU PATIENT DAYS: 0       |
| MENTAL HEALTH              | 11               | 0%       |                           |
| ICU/SCU                    | 77               | 0%       |                           |
| PCU                        | 0                |          | NON-BENEFICIARIES:        |
|                            |                  |          | # Discharged: 2           |
| Total                      | 459              |          | With total LOS of 42 days |
| NEWBORN                    | 2                | 0%       | % OF OCCUPANCY: 0.00%     |
| Name of SUD                | Signature Of SUD | Date     |                           |

Figure 4-29: Inpatient Services by Month (HSA-202-1) Report (Part III)

## 4.2.8 Operators' Inpatient List

The **Operators' Inpatient List** shows selected patient data for each inpatient.

### 4.2.8.1 Operators' Inpatient List Parameters

There are no parameters for the **Operators' Inpatient List**. Click **Preview** to view the report.

### 4.2.8.2 Information in the Operator's Inpatient List

The **Operators' Inpatient List** includes the following information for each patient matching the specified report parameters:

- Patient name (Only displays if patient opted **not** to be excluded from directory)
- Phone (if available)
- Room
- Ward

- Sex
- Patient age
- Community

Figure 4-30 shows an example of a typical **Operators' Inpatient List**.

Operators' Inpatient List

Preview Print

1 of 2 100%

Confidential Patient Data Covered by Privacy Act Nov 07, 2022  
Operators' Inpatient List 1:22 PM

| Patient               | Phone  | Room           | Ward | Sex | Age    | Community   |
|-----------------------|--------|----------------|------|-----|--------|-------------|
| BPRM, DEMO            |        |                | TW1  | F   | 37 YRS | PHOENIX     |
| BPRM, DEMO            |        | TW-600         | TW1  | M   | 30 YRS | PARKER      |
| BPRM, DEMO            |        | 112-2          | INPT | F   | 28 YRS | PARKER      |
| BPRM, DEMO            |        | 50-101         | SOBG | M   | 27 YRS | PEACH SPRGS |
| BPRM, DEMO            |        |                | TW4  | M   | 15 YRS | PARKER      |
| BPRM, DEMO            |        | TW-400         | TW1  | M   | 21 YRS | PARKER      |
| BPRM, CZBABY          |        | PEDICU-02PICU  |      | F   | 11 MOS | LOS ANGELES |
| BPRM, CZDIOFF         |        | CZ-100         | CTGH | F   | 46 YRS | SAN DIEGO   |
| BPRM, CZFOUR          |        | CS-A           | CS   | M   | 76 YRS | PHOENIX     |
| BPRM, CZGUARANTOR     |        |                | PICU | F   | 46 YRS |             |
| *****                 | x92832 | ENW-005        | ENW  | M   | 46 YRS | SAN DIEGO   |
| BPRM, CZINTEST        |        |                | CS   | F   | 74 YRS | CHANDLER    |
| BPRM, CZSENSITIVE     |        | CIW-100A       | CIW  | F   | 38 YRS | CHANDLER    |
| *****                 |        |                | CW   | F   | 49 YRS | SAN DIEGO   |
| BPRM, CZTRIBAL        |        |                | CW   | F   | 44 YRS | SAN DIEGO   |
| BPRM, CZTRIBALTWO     |        | CW-8           | CW   | F   | 57 YRS | SAN DIEGO   |
| BPRM, CZTWO           |        | CS-B           | CS   | U   | 77 YRS | SAN DIEGO   |
| BPRM, CZWRISTBAND     |        | 107-2          | INPT | F   | 41 YRS | SAN DIEGO   |
| BPRM, DIOFFTWO        |        | CZ-100A        | CTGH | F   | 67 YRS | SAN DIEGO   |
| BPRM, EN ESTER        | x92839 | ENW-004        | ENW  | F   | 87 YRS | TEMECULA    |
| BPRM, EN' KID         | x45876 | ENW - 006ENW   |      | M   | 3 YRS  | SAN DIEGO   |
| BPRM, EN' NEWPT       | x92835 | ENW-001        | ENW  | M   | 35 YRS | SAN DIEGO   |
| BPRM, ENAOB           | x28394 | EN PCU -0ENPCU |      | M   | 92 YRS | OXNARD      |
| BPRM, ENFUTURE        |        |                | ENW  | F   | 22 YRS |             |
| *****                 | x92838 | ENW-003        | ENW  | M   | 67 YRS | CORONACA    |
| BPRM, ENTHREE DEMO-ON |        |                | ENPR | M   | 77 YRS |             |

Figure 4-30: Operators' Inpatient List example

## Appendix A ADT User Role Access

| Functional Area   | ADT Clerk Role                                                                                                                                                                                                     | ADT Coder Role                                                                                                                                                                                                                                    | ADT Supervisor Role |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Ward Workspace    | Yes                                                                                                                                                                                                                | Yes, but only allowed to access the following context menu: <ul style="list-style-type: none"> <li>View Admission Detail</li> <li>Print A-Sheet</li> <li>Select Patient in EHR</li> </ul>                                                         | Yes                 |
| List View         | Yes                                                                                                                                                                                                                | Yes, but only allowed to access the following context menu: <ul style="list-style-type: none"> <li>View Admission Detail</li> <li>Print A-Sheet</li> <li>Select Patient in EHR</li> </ul>                                                         | Yes                 |
| Incomplete Charts | No                                                                                                                                                                                                                 | Yes                                                                                                                                                                                                                                               | Yes                 |
| Discharge List    | Yes, but only allowed to access the following context menu: <ul style="list-style-type: none"> <li>View Admission Detail</li> <li>Print A-Sheet</li> <li>Print Wristband</li> <li>Select Patient in EHR</li> </ul> | Yes, but only allowed to access the following context menu: <ul style="list-style-type: none"> <li>View Admission Detail</li> <li>Print A-Sheet</li> <li>Select Patient in EHR</li> <li>Create Incomplete List or View Incomplete List</li> </ul> | Yes                 |
| Settings          | No                                                                                                                                                                                                                 | No                                                                                                                                                                                                                                                | Yes                 |

| Functional Area | ADT Clerk Role                                                                                                                                                                     | ADT Coder Role                                                                                                                                                                                                                                                                 | ADT Supervisor Role |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Reports         | Yes, but only allowed to access the following Reports: <ul style="list-style-type: none"><li>• Operators' Inpatient List</li><li>• Current Inpatient by Ward/Room Report</li></ul> | Yes, but only allowed to access the following Reports: <ul style="list-style-type: none"><li>– Current Inpatient List</li><li>– Discharges by Date</li><li>– Incomplete Chart List by Provider</li><li>– Inpatient Coding Status</li><li>– Operator's Inpatient List</li></ul> | 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 an RPMS system, in accordance IHS policy.

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

Both documents are available at this IHS website: <http://security.ihs.gov/>.

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

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

### B.1 All RPMS Users

In addition to these rules, each application may include additional ROB 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 window 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 window 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 IHS IT Service Desk.

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