



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

CMET User Manual

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Office of Information Technology
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Preface

The purpose of this manual is to provide the information needed to use the latest enhancements to the CMET functionality available in the iCare (BQI) population management application.

This manual contains reference information about iCare views, examples of its processes, and step-by-step procedures to demonstrate how to perform activities related to CMET in the latest version of the iCare application.

For more information about iCare basic functionality, iCare usage, or training for iCare consult these resources:

- iCare – Indian Health Service (IHS) Office of Information Technology (OIT): Available at <http://www.ihs.gov/icare/>
- iCare CMET – IHS OIT: Available at <https://www.ihs.gov/icare/cmet/>
- iCare Training: Available at <https://www.ihs.gov/icare/training/>
- Recorded AdobeConnect sessions for iCare available at <https://ihs.adobeconnect.com/r6yazmoz1gm>
- Join the iCare listserv by sending an e-mail to icare@listserv.ihs.gov

1.0 Introduction

The iCare application is a Windows-based, client-server graphical user interface (GUI) to the Indian Health Service (IHS) Resource and Patient Management System (RPMS). The iCare application retrieves key patient information from various components of the RPMS database and brings it together under a single, user-friendly interface. iCare is intended to help providers manage the care of their patients. The ability to create multiple panels of patients with common characteristics (e.g., age, diagnosis, community) allows users to personalize the way they view patient data.

For more information about iCare basic functionality, iCare usage, or training for iCare, consult the resources listed in the Preface.

1.1 Background

Along with the rest of the healthcare industry, IHS has developed a set of chronic condition management (or register) applications, including for diabetes, asthma, and HIV. This type of application provides a way for healthcare providers to manage a specific group (register) of patients for a single disease state. Register management applications assist healthcare providers to identify high-risk patients, proactively track care reminders and health status of individuals or populations, provide more standardized and appropriate care by embedding evidence-based guidelines, and report outcomes.

Many patients, however, have more than one diagnosed disease. For instance, at the current time within the Indian Health system, a diabetic asthmatic woman could be a member of four RPMS registers (diabetes, asthma, women's health, and immunizations). This "silo" approach to patient care could potentially result in fragmented care and could increase the risk of inadequate patient care management due to misidentification of the true level of risk.

1.2 iCare Graphical User Interface

The iCare GUI is intended to allow providers to see a more complete view of patients with multiple conditions, while maintaining the integrity of the user-defined, disease-specific registers.

iCare can help IHS providers by:

- Proactively identifying and managing different groups (populations) of patients who share user-defined characteristics.
- Providing an integrated view of a patient's conditions that would minimize "stove-piped" care management.
- Providing an intuitive and integrated interface to the diverse patient data elements of the RPMS database.

- Facilitating providers a review of clinical quality of care measures for their own patients to enable improvement in the quality of healthcare delivery.
- Enabling views of traditional healthcare information from the perspectives of community, population and public health.
- Providing the default tag selection as Proposed and Accepted. Change the tag selection for any record by selecting or de-selecting any check box.
- Providing the **use AND?** check box when multiple tags are selected. The **And** option searches for patients who have *all* of the user-defined tags.

1.3 Who Should Use iCare?

Any provider who needs to identify a group of patients for long-term management or to create a temporary list should consider using iCare.

Do you fit any of the following scenarios?

- I am a nurse at a facility that assigns a primary care provider to each patient. Every day, I want to create a list of scheduled patients for two different doctors in my clinic.
- I want to identify which of my patients are considered obese, so I can recommend nutrition counseling.
- Because providers at our clinic have performance goals related to annual GPRA clinical measures, I want to identify which of my patients are missing key clinical data.
- Our Women's Health Clinic wants to focus on two clinical performance improvement initiatives this year. We want to identify the performance problem areas for female patients between the ages of 18 and 50.
- I am one of two part-time case managers for a group of children, and I want to create a patient list that we both can use.

2.0 Orientation

This section provides an overall look at the design and functions of the main screen elements of the iCare interface. The Care Management Event Tracking (CMET) module has a tab on each element of the iCare interface: **Main View**, **Panel View**, and **Patient View**.

The core concept of iCare is the patient panel. This panel is a list of patients that the user has defined, either manually by selecting individual patients or by using automated search definitions.

2.1 iCare Windows Overview

The iCare main window will display the namespace and RPMS server address. This aids larger sites with multiple servers. The user can quickly review which server and namespace are being accessed.



Figure 2-1: Sample namespace and RPMS server address information

2.1.1 iCare Main Window

The iCare main window contains two lists, which can be displayed on separate tabs or viewed on a split screen, as well as the following: **Community Alerts**, **National Measures**, **CMET**, and **IPC**. See other user manuals for more information about the non-CMET tabs.

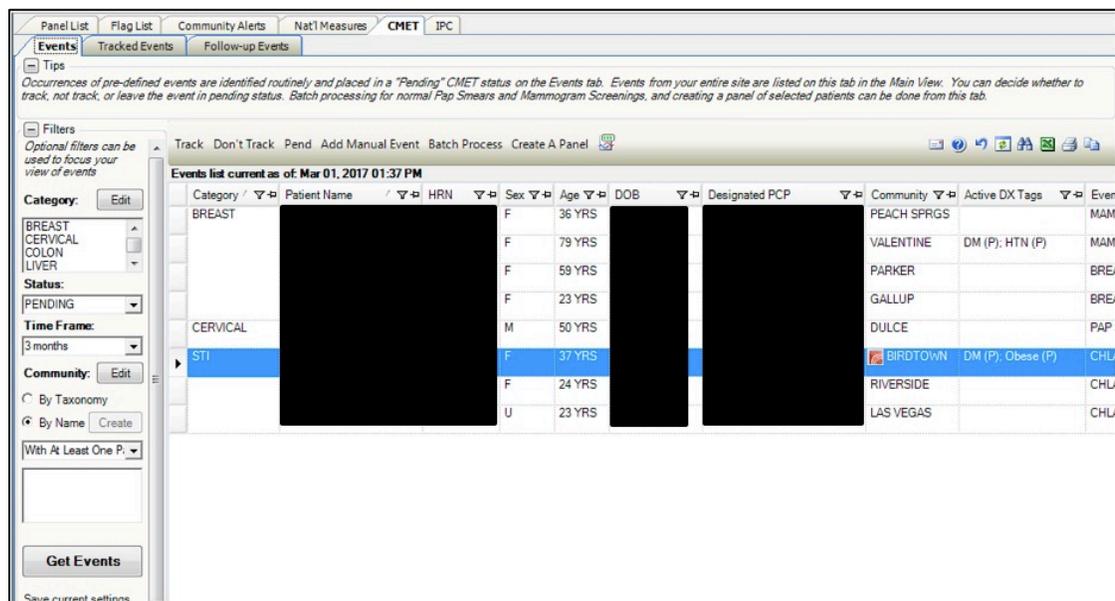


Figure 2-2: CMET tab



Figure 2-3: Main view

2.1.2 About the iCare Panel View Window

The **Panel View** displays a list of the patients who met the panel definition criteria in a particular panel.

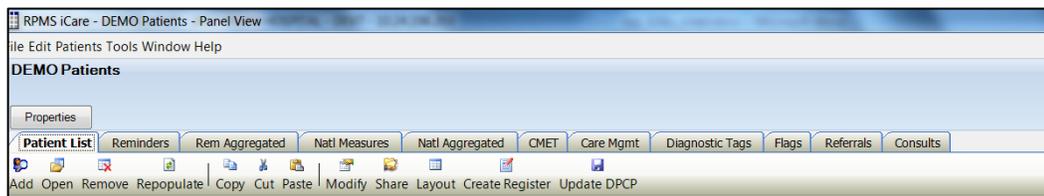


Figure 2-4: Panel View

2.1.3 About the iCare Patient Record Window

The **Patient Record** window displays information about a selected patient from data stored in the RPMS database.

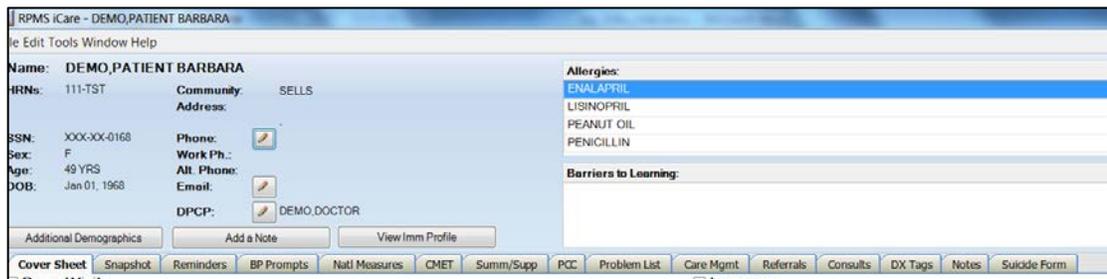


Figure 2-5: Patient View

2.2 Key iCare Concepts

This section discusses the taxonomy concept which may have an impact on CMET events.

Many RPMS clinical applications, for example, the Diabetes Management System, the Clinical Reporting System, the PCC Health Maintenance Reminders, and iCare contain logic (artificial intelligence) statements that compare and calculate various types of patient data to arrive at a conclusion.

For example, in order for a Pap Smear Reminder to appear on the Health Summary, RPMS has to calculate the following about the patient:

- Is the patient a woman?
- If yes, does she fall into a certain age range?
- If yes, was a Pap smear ever performed?
- If yes, what is the date of the most recent Pap smear?
- If the most recent test is overdue, a reminder needs to display.

To produce results with comparable data across every facility, the clinical definition of a Pap smear has been defined nationally. Clinical definitions use RPMS taxonomies to contain the various elements of a definition. As much clinical logic as possible is based on standard national codes, including ICD, CPT, LOINC, NDC, and national IHS standard code sets (e.g., Health Factors, patient-education codes, etc.). For terminology that is not standardized across each facility, such as lab tests or medications, RPMS uses taxonomies that can be populated by each individual facility with its own codes.

For data elements like diagnoses, procedures, or lab tests identified by LOINC codes, the taxonomy simply identifies the standard codes that a software program should look for. These codes are hard-coded by a programmer into software-defined taxonomies that are distributed either in an ATX patch or with the RPMS software using those taxonomies. These taxonomies can only be updated by the software programmer or terminologist at the direction of a national clinical logic review process.

Site-populated taxonomies are used to mitigate the variations in naming convention for types of data elements that vary from one facility to another, including medications and lab tests. This means, for example, that one site's Pap smear data can be compared to another site, even though the same term is not used for the Pap smear lab test. Or, one site's beta-blocker data can be compared to another site, even though the same names are not used for beta-blocker drugs.

For example, one site's Lab table might contain the term "Glucose Test," while another site's table might contain the term "Glucose" for the same test. PCC programs have no means for dealing with variations in spelling, spacing, and punctuation. Rather than attempting to find all potential spellings of a particular lab test, the application would look for a pre-defined taxonomy name that is installed at every facility. The contents of the taxonomy are determined by the facility. In this example, the application would use the DM AUDIT GLUCOSE TESTS TAXONOMY. The individual facility will enter all varieties of spelling and punctuation for Glucose Tests used at that particular facility.

CMET uses taxonomies to find events for the pending queue. See Appendix A for a list of CMET events and the taxonomies used for data mining.

3.0 CMET

The **Care Management Event Tracking (CMET)** tab on the iCare Main View window provides information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs. The CMET data in the Main View includes all data that meets the filter criteria.

Figure 6: CMET Events tab

Category	Patient Name	HRN	Sex	Age	DOB	Designated PCP	Community	Active DX Tags	Event Name	Status	Event Date	Expanded Event
BREAST			F	46 YRS			FALLS CITY	DM (A); HTN (P); Obese (P)	MASTECTOMY UNILATERAL	PENDING	Apr 18, 2018	Event obtained from V CPT - 12201 MAST SIMPLE COMPLETE
BREAST			F	26 YRS			FALLS CITY		MASTECTOMY BILATERAL (DRG MOD 50)	PENDING	Apr 18, 2018	Event obtained from V CPT - 19201 MAST MOD RAD
BREAST			F	44 YRS			FALLS CITY	Obese (P)	NODE DISSECTION SENTINEL	PENDING	Apr 08, 2018	Event obtained from V CPT - 38530 BIOPSY/REMOVAL LYMPH NODES
BREAST			F	31 YRS			FALLS CITY		BREAST MRI	PENDING	Apr 08, 2018	Event obtained from V CPT - C8509 MRI w/o fld w/out breast
BREAST			F	57 YRS			FALLS CITY	HTN (P)	PAP SMEAR	PENDING	Apr 18, 2018	Event obtained from V CPT - 92001 Screening pap smear by phys
BREAST			F	47 YRS			FALLS CITY	DM (A); HTN (P)	PERIANAL BIOPSY	PENDING	Apr 18, 2018	Event obtained from V CPT - 48807 DIAGNOSTIC ANOSCOPY & BIOPSY
BREAST			F	35 YRS			FALLS CITY	HTN (P)	PELVIC EXAM	PENDING	Apr 18, 2018	Event obtained from V CPT - G0101 CA screen pelvic breast exam
BREAST			F	39 YRS			FALLS CITY		CONE BIOPSY	PENDING	Apr 18, 2018	Event obtained from V CPT - 57520 CONIZATION OF CERVIX
BREAST			F	39 YRS			FALLS CITY		LASER CONE	PENDING	Apr 18, 2018	Event obtained from V CPT - 57520 CONIZATION OF CERVIX
BREAST			F	57 YRS			FALLS CITY	HTN (P)	PELVIC EXAM	PENDING	Apr 08, 2018	Event obtained from V CPT - G0101 CA screen pelvic breast exam
BREAST			F	30 YRS			FALLS CITY		HPV - DNA SCREEN	PENDING	Apr 08, 2018	Event obtained from V CPT - G0876 HPV combo assay ca screen
BREAST			F	26 YRS			FALLS CITY	Obese (P)	ENDOMETRIAL BIOPSY	PENDING	Apr 08, 2018	Event obtained from V CPT - 59804 Endo smpl/hyst bx res no dx
BREAST			F	38 YRS			FALLS CITY		COLPOSCOPY IMPRESSION	PENDING	Apr 08, 2018	Event obtained from V CPT - 57481 CONZ OF CERVIX W/SCOPE LEEP
BREAST			F	38 YRS			FALLS CITY		CONE BIOPSY	PENDING	Apr 08, 2018	Event obtained from V CPT - 57481 CONZ OF CERVIX W/SCOPE LEEP
BREAST			F	38 YRS			FALLS CITY		LEEP	PENDING	Apr 08, 2018	Event obtained from V CPT - 57520 CONIZATION OF CERVIX
BREAST			F	63 YRS			FALLS CITY	CKD 3 (P); COPD (P); DM (A); HTN (P)	CONE BIOPSY	PENDING	Apr 08, 2018	Event obtained from V CPT - 57520 CONIZATION OF CERVIX
BREAST			F	63 YRS			FALLS CITY	CKD 3 (P); COPD (P); DM (A); HTN (P)	LEEP	PENDING	Apr 08, 2018	Event obtained from V CPT - 57520 CONIZATION OF CERVIX
BREAST			F	46 YRS			FALLS CITY	HTN (P)	COLONOSCOPY	PENDING	Apr 06, 2018	Event obtained from V CPT - 44407 COLONOSCOPY W/INL ASPR/DA

Figure 6: CMET Events tab

Figure 3-7: CMET Events tab

Category	Patient Name	HRN	Sex	Age	DOB	Designated PCP	Community	Active DX Tags	Event Name	Status	Event Date	Expanded Event
BREAST			F	36 YRS			PEACH SPRGS					
BREAST			F	79 YRS			VALENTINE	DM (P); HTN (P)				
BREAST			F	59 YRS			PARKER					
BREAST			F	23 YRS			GALLUP					
BREAST			M	50 YRS			DULCE					
BREAST			F	37 YRS			BIRDTOWN	DM (P); Obese (P)				
BREAST			F	24 YRS			RIVERSIDE					
BREAST			U	23 YRS			LAS VEGAS					

Figure 3-7: CMET Events tab

The data on the various sub-tabs are for those patients with an active HRN (Health Record Number).

The CMET tab displays the statuses of particular tests/procedures/exams on the various sub-tabs. The term “event” refers to what needs to be completed, for example, Breast Exam.

- These events are listed by category: Breast, Cervical, Colon, Liver, Prostate, Skeletal, and STI.
- The events apply to all patients meeting the data mining criteria.

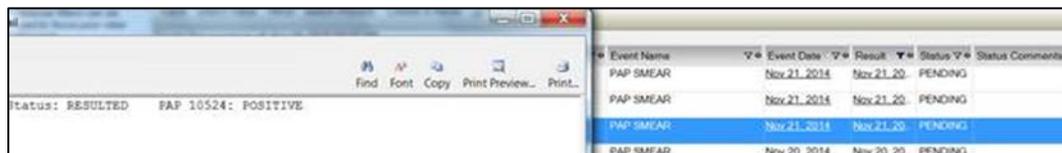
If two users are working on the same CMET record, the changes that are saved first will be applied. A message to the second user is provided: “This record has just been updated. Do you want to refresh the entire list?” Click **Yes** to refresh (otherwise, click **No**).

Consider the following information:

When using the **Startup View** tab of **User Preferences**, select the desired startup view when opening iCare. Select the **CMET** option button on **User Preferences** to view a secondary field. Use this secondary field to define the default sub-tab, for example, **Tracked Events**. Select the **Layouts** tab on **User Preferences** to select the default template for the various CMET sub-tabs.

3.1 CMET Workflow

When events are mined via the iCare nightly Background Job, they show up as a **Pending** event in the **Events** tab, for evaluation to determine if the event was positive or negative, and whether it should be tracked.



Event Name	Event Date	Result	Status	Status Comments
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 21, 2014	Nov 21, 20	PENDING	
PAP SMEAR	Nov 20, 2014	Nov 20, 20	PENDING	

Figure 3-8: Sample Result detail and CMET Events tab row highlighted

New columns were added to show the detail information about the **Event** and the **Result: Expanded Event** and **Expanded Result**. The original underlined columns still open to display the result of the information.

Event Name	Status	Event Date	Expanded Event	Result	Expanded Result
MAMMOGRAM SCREENING	PENDING	Oct 12, 2012	Event obtained from: V POV - 793.89 ABN FINDING-BREAST NEC		
BREAST ULTRASOUND	PENDING	Oct 12, 2012	Event obtained from: V CPT - 76645 US EXAM BREAST(S)		
MAMMOGRAM DX BILATERAL	PENDING	Oct 12, 2012	Event obtained from: V CPT - G0204 Dx mammo incl ced bi		
MAMMOGRAM DX BILATERAL	PENDING	Oct 05, 2012	Event obtained from: V CPT - 77056 MAMMOGRAM BOTH BREASTS		
BREAST ULTRASOUND	PENDING	Sep 28, 2012	Event obtained from: V RADIOLOGY - ECHOGRAM BREAST B-SCAN & OR REAL TIME	Sep 28, 2012	<p>113211105 46169 DOB-AUG 15, 1971 F Case: 092812</p> <p>Req Phys: FIGLER (Req g Loc) Pat Loc: OPEN ACCESS</p> <p>Att Phys: UNKNOWN Img Loc: RADIOLOGY</p> <p>DEPARTMENT Service: Unknown</p> <p>Pri Phys: UNKNOWN Service: Unknown</p> <p>Pregnancy Screen: Patient is unable to answer or is unsure</p> <p>Pregnancy Screen Comment: not</p> <p>(Case 113 COMPLETE) ECHOGRAM BREAST B-SCAN & OR REAL (RAD Detailed) CPT:76645</p> <p>SNOMED-CT: none LOINC: none</p> <p>Proc Modifiers: LEFT</p> <p>Reason for Study: See Clinical History:</p> <p>Clinical History: MAMMOGRAM AT LA PAZ SHOWS NODULAR DENSITY, APPROX 3O'CLOCK LEFT BREAST, ESSENTIALLY RETROARELAR. US RECOMMENDED. SEE SCANNED RESULTS IN SYSTEM.</p> <p>Report: Status: VERIFIED</p>

Figure 3-9: Sample Events list

Even events with a negative result should be tracked to indicate that someone has reviewed and verified the result, that the patient has been notified of the result, and whether a follow-up procedure has been identified.

For negative Pap smears and mammograms reports, multiple events can be batch processed because there is a set follow-up, such as another Pap or mammogram in a defined time frame in one year, two years, etc.

Category	Patient Name	HRN	Age	Event Name	Status	Event Date	Expanded
BREAST			66 YRS	GUARITZSITE HTN (P) MAMMOGRAM SCREENING	PENDING	Mar 18, 2013	Event V CPT
			65 YRS	PEACH SPRGS DM (P), HTN (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			41 YRS	PEACH SPRGS Asthma (P), Obese (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			56 YRS	VALENTINE HTN (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			72 YRS	PEACH SPRGS DM (P), Glau (P), HTN (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			69 YRS	PEACH SPRGS Asthma (P), HTN (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			62 YRS	PEACH SPRGS DM (P), HTN (P) MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			42 YRS	PEACH SPRGS MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT
			54 YRS	PEACH SPRGS MAMMOGRAM SCREENING	PENDING	Feb 20, 2013	Event V CPT

Figure 3-10: Batch Process dialog

CMET Batch Mammogram Screening

Batch Parameters
Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram.
The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram); Follow up In and Notification Type can be changed.

Status: TRACKED

Event Finding*: B-RAD CATEGORY 1 - N Finding Interpretation: Normal

Follow-up Event: MAMMOGRAM SCREENING Follow-up In*: 2 years

Notification Type*: LETTER Notification Date*: 02/14/2017

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Patient Name	HRN	DOB	Sex	Event Date
			F	Feb 20, 2013
			F	Feb 20, 2013
			F	Feb 20, 2013
			F	Feb 20, 2013

OK Cancel

Figure 3-11: Sample multiple selection and Batch Process detail screens

Follow-up Events become CMET Reminders when the iCare Nightly Background Job runs (or an iCare user accesses a patient’s **Reminders** tab in the iCare Patient Records and recalculates the Reminders for the selected patient) and can be due in the future or overdue.

Follow-up Events		
Category	Follow-up Event Name	Follow-up Event Date
BREAST	MAMMOGRAM SCREENING	Feb 20, 2018
	MAMMOGRAM SCREENING	⚠ Mar 10, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015
	MAMMOGRAM SCREENING	⚠ Feb 20, 2015

Figure 3-12: CMET **Follow-up Events** view with overdue events

Users of iCare can then create an iCare panel based on the **Mammogram Screening (CMET)** reminder for upcoming or overdue reminders and follow the normal process for Reminder Notifications from the **Panel View – Definition** details tab.

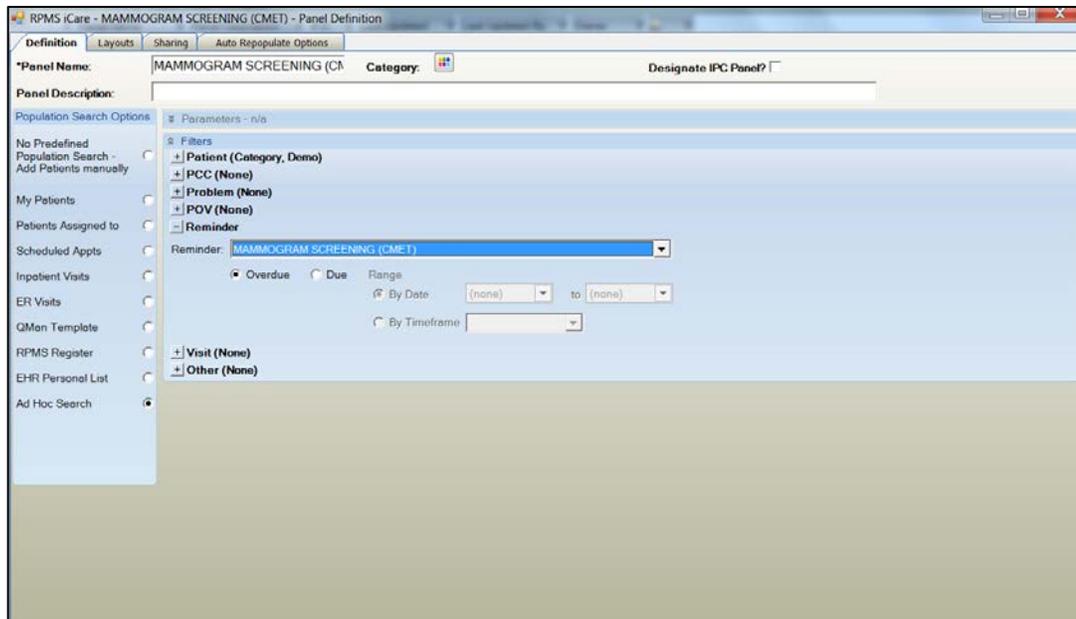


Figure 3-13: **Definition** panel – Filters view

4.0 CMET Main View

This section describes the sub-tabs for the CMET main window.

4.1 Events Sub-Tab

The **Events** sub-tab displays all events that have been identified at your site in the routine Background Job. This can be a very large number of events; limit this display by applying filters to the view. Filtering does not affect the routine Background Job.

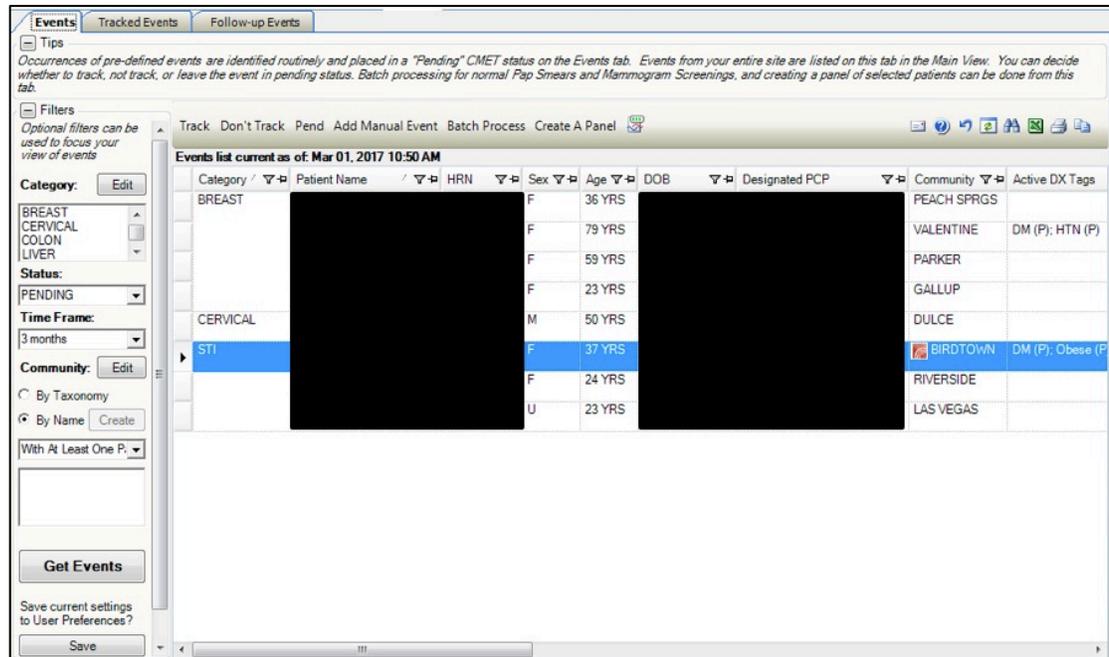


Figure 4-1: **Events** sub-tab

Events are procedures, screenings, and/or exams that are pre-defined and categorized into Breast, Cervical, Colon, Liver, Skeletal, STI, and Prostate. The occurrence of these events is searched for during a routine Background Job at your site. The most recent occurrence of any event within a certain time period is then placed on the **Events** tab where users can elect to either track or not track the event or leave it in a Pending status indefinitely.

The information on this sub-tab is divided into three general areas: **Tips**, **Events** data, and **Filter**.

The **Tips** segment provides an overview of the sub-tab. Collapse this information to expand the space for viewing the Events data.

The **Filters** area provides filters for applying filter criteria to the events data. Collapse this area to expand the available space for viewing Events data.

Note: Establish the default collapse status for the Tips and Filters areas on this sub-tab by selecting:
Tools | User Preferences | CMET tab | Events sub-tab.
Use the check boxes on the Events sub-tab to establish the collapse status.

The default filters are established on the **CMET** tab (**Events** sub-tab) of user preferences. These filters include Category, Status, TimeFrame, and Community. Section 8.1 provides more information about these filters.

Users can filter columns on the **Events** sub-tab. This is a temporary filter and changes will not save after exiting the application.

The initial data mining will return the most recent occurrence of every event found with an established time frame. These events are displayed on the **Events** sub-tab. Section 8.9.1 provides for more information about the time frames.

4.1.1 Filter Group Box

Use the filter features shown in the **Filters** group box. Filter the events by using one or more of the following: Category, Status, Time Frame, Community. Then, click the **Get Events** button to re-display the events.

Get Events: After changing the filters in the **Filters** group box, click the **Get Events** button to update the display.

Save: After changing the filters in the **Filters** group box, click **Save** to set them as the default filters. This means those filters will be in effect in another iCare session. This action changes the filters in User Preferences (on the **CMET** tab).

Restore to User Pref: To return to the last-saved CMET filters in **User Preferences**, click the **Restore to User Pref** button.

4.1.2 Events Sub-Tab Layout

The data on the **Events** sub-tab is current as of the date/time on the toolbar.

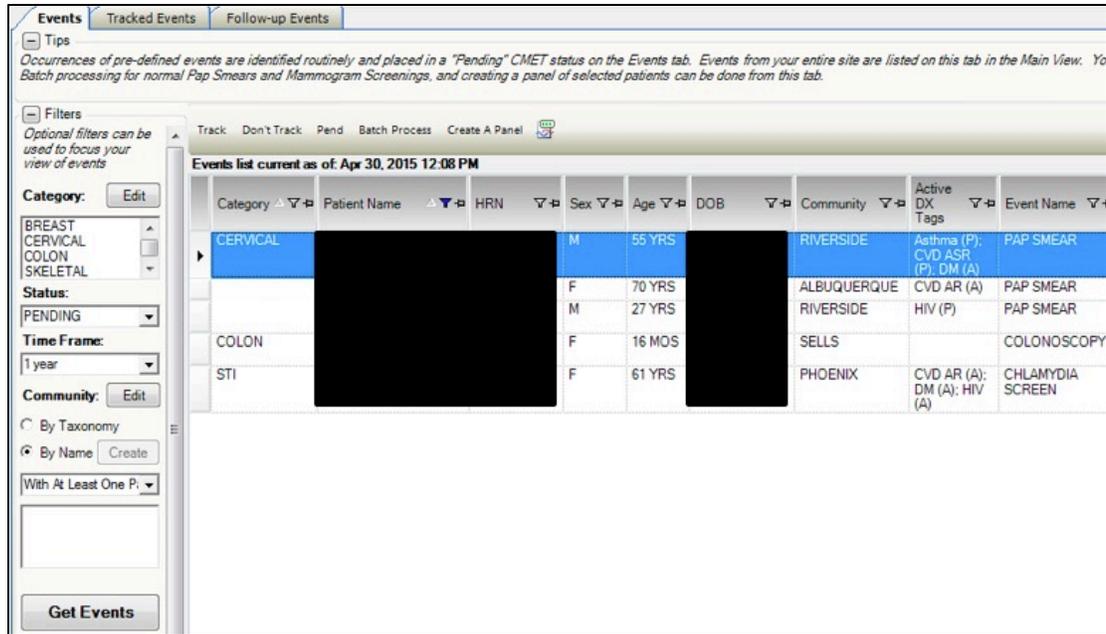


Figure 4-2: Columns on **Events** sub-tab

Table 4-1 provides information about the columns on the **Events** sub-tab.

Table 4-1: **Events** sub-tab – column Names and descriptions

Column Name	Meaning
Category	The name of the category for the event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
Patient Name	Required field; links to the Events sub-tab of the CMET tab on the Patient Record by double-clicking it.
HRN	Patient’s Health Record Numbers.
Sex	F (for female), M (for male) or U (for unknown)
Age	Patient’s age today.
DOB	Patient’s date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient’s community of residence.
Active DX Tags	Predefined Diagnosis definitions (tags) that iCare has proposed for this patient, based on the tagging function (Proposed or Accepted).
Event Name	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Expanded Event	Displays event information.
Event Date	The date associated with the event.

Column Name	Meaning
Result	The date of the result of the event. This cell also has hover help, which identifies where the result comes from, such as V Radiology, V Lab, or Women's Health packages.
Expanded Result	Displays result information.
Status	The status of the event: Pending, Superseded, Tracked, or Not Tracked.
Status Comments	Text of the any comments about the status.
Last Modified Date/Time	The date the event was last modified
Last Modified By	The name of the person who last modified the event (in some cases it will read "Initial job").

The default sort order is as follows: **Category**, **Date of Event** (newest listed first), **Patient Name** (in alphabetical order).

A **Community** cell may contain the **Community Alert** () icon. View the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the **Community** column.

View the **CMET - Visit Detail** pop-up for any underlined date in the **Event Date** column by double-clicking the date.

View a particular detail pop-up for any underlined date in the **Result** column by double-clicking the date.

If there is an older event with a status of **Pending** and a new event comes in, the application changes the status of the older event to **Superseded**. This type of event cannot be tracked.

4.1.3 Buttons on Events Sub-Tab

Please consider the following:

In order to view an event status, change the **Status** field in the **Filters** group box. For example, if the status of an event is changed to Tracked, change the Status to Tracked (or All) and then click **Get Events**.

4.1.3.1 Track Button

The **Track** function requires the iCare Editor (BQIZCMED) security key. Select one or more events with a status of Not Tracked or Pending and then click the **Track** button (or select **Track** on the context menu).

Once an event is Tracked, it cannot be changed to Not Tracked. If the particular event was incorrectly changed to Tracked, go to the **Tracked** tab and access the CMET worksheet for the event tracked in error.

If the user selects events that are not eligible for the Tracked function, the application displays the message: “Events having a status of Tracked can’t be changed to Tracked.” Click **OK** to dismiss the message.

If the user selects only one eligible event, the application displays the **RPMS iCare - Track - Findings Due Date** dialog.

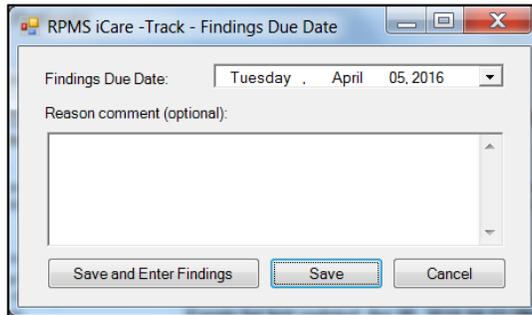


Figure 4-3: **RPMS iCare - Track - Findings Due Date** dialog

If the user selects more than one eligible event, the application displays **the RPMS iCare - Track - Findings Due Date** dialog for multiple events.

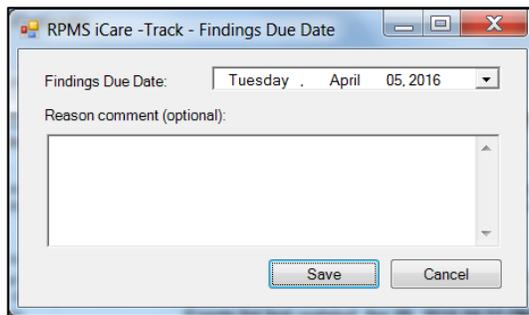


Figure 4-4: **RPMS iCare - Track - Findings Due Date** dialog for multiple events

In either case, do the following:

- Make sure that the correct date is in the **Findings Due Date** field (required). To change it, click the list to access a calendar and select another date. The date cannot be earlier than the current date.
- Type the text of the reason for changing the status to **Tracked** in the Free Text field (not required; see Section 8.2).
- Click **Save** to save the information (otherwise, click **Cancel**). and change the status of the events to Tracked. These events will display on the **Tracked** events sub-tab of the main window.

If using the **Save and Enter Findings** button for a single event, the application displays the CMET Worksheet (where users can add Findings to the event, for example). Section 4.4 provides for more information about the worksheet. Save the worksheet to return to the **Events** sub-tab.

4.1.3.2 Don't Track Button

Use the **Don't Track** function to change the status of a Pending event to Not Tracked. Select the events and click **Don't Track** (or select **Don't Track** on the context menu).

If a user selects **Tracked** events, they are not eligible for the **Not Tracked** function. In this case, the application displays the message: "Once an event has been Tracked, it cannot be changed to Not Tracked. See the User Manual guidance on how to manage an event that was tracked." Click **OK** to dismiss the message. If the selected Tracked event was tracked in error, Section 4.5 provides information on how to handle this error.

If the user selected eligible events, the application displays the **RPMS iCare – Don't Track Event** dialog.

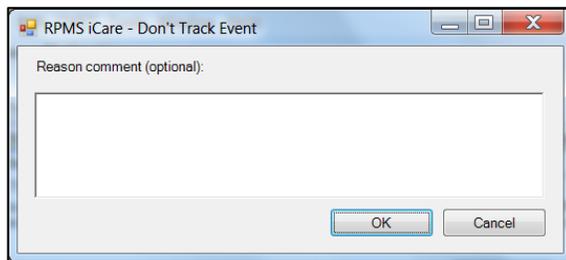


Figure 4-5: RPMS iCare – Don't Track Event dialog

Type a reason for the change in the Free Text field (not required; see Section 8.2). Click **OK** to save and to change the Status of the events to **Don't Track**. (Otherwise, click **Cancel**.)

4.1.3.3 Pend Button

Use the **Pend** button to change the status of a Not Tracked event to Pending. Select the events and click the **Pend** button (or select **Pend** on the context menu).

If the user selects events that are not eligible for the **Pend** button, the application displays the message: "Only events with status of Not Tracked can change to Pending." Click **OK** to dismiss the message.

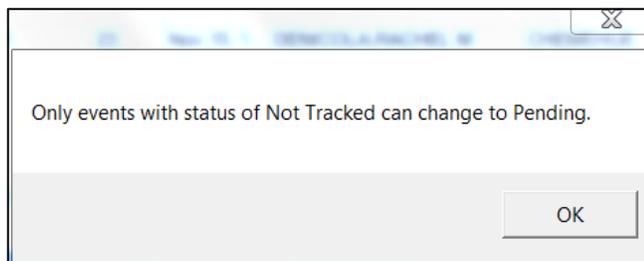


Figure 4-6: Pend Function message

If the user selected eligible events, the application displays the **RPMS iCare – Pend Event** dialog.

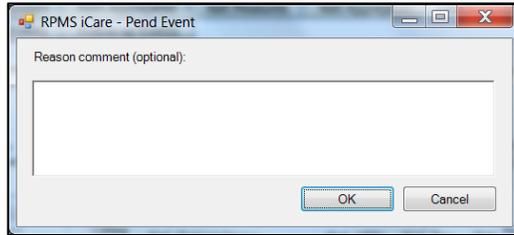


Figure 4-7: **RPMS iCare – Pend Event** dialog

Type a reason for the change in the Free Text field (not required; see Section 8.2). Click **OK** to save and to change the Status of the events to **Pending** (otherwise, click **Cancel**.)

4.1.3.4 Add Manual Event

Use the **Add Manual Event** function to add manual events. The **Add Manual Event** function requires the iCare Editor (BQIZCMED) or iCare Package Manager (BQIZMGR) security key.

Add a new manual event by doing one of the following:

- Click the **Add Manual Event** (**Add Manual Event**) button.
- Select **CMET | Events | Add Manual Event**.

The **Select Patients** window displays. (This does not apply when used on the **Patient Record** screen).

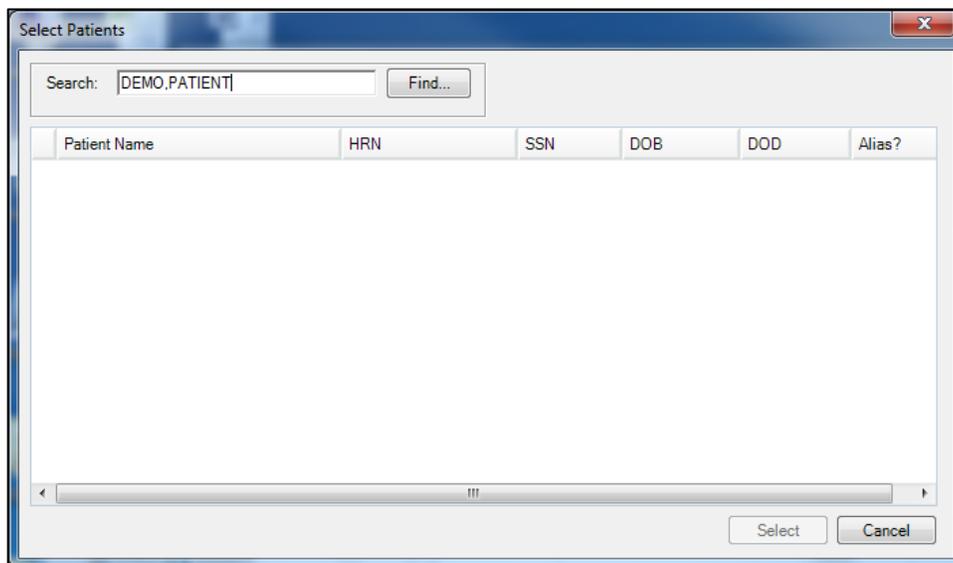


Figure 4-8: **Selected Patients** dialog

The **Add Manual Event** window displays.

Figure 4-9: **Add Manual Event** dialog

The fields with an asterisk (*) following the name are required.

Date: Select a date for the event.

Event: Select the event.

PCC File: Select the PCC File.

Default Value: Select a default value for the event.

Finding: Select a finding, if desired for the event.

Select Location:

- **IHS/Tribal Facility:** Select a **Location**

or

- **Other:** Enter **Outside** Location and if desired, **Outside Provider**

Findings Comment: Enter a comment for the finding, if desired.

Click **Save** to save a new manual event.

Click **Save and Track** to save and track a new manual event, which has the same behavior as the **Track** button (Section 4.1.3.14.4).

Use **Save, Track and Open WorkSheet** to save a new manual event, track, and open a CMET worksheet. This has the same behavior as the **Open CMET Worksheet** button (Section 4.2.3.4) on the **Tracked Events** tab.

4.1.3.5 Batch Processing Button

The Batch Process only applies to screening mammograms and Pap smears with normal results. This process can be applied to multiple events. Although it can be applied to one event, its purpose is to be applied to multiple events.

The CMET Package Manager sets the parameters for batch processing for the entire site. The Batch Process function requires the iCare Editor (BQIZCMED) security key.

The Batch Process works only on events that are Pending.

- If the user selects a mammogram screening or Pap smear event that is not Pending, the application displays the **Invalid Selection** message: “Please select only **PENDING Events** in order to process these as a batch.” Click **OK** to dismiss the message.

If the user selects an event that is not a mammogram screening or Pap smear, the application displays the **Invalid Selection** message: “The event type selected is not eligible for batch processing. Please reselect.” Click **OK** to dismiss the message.

Select either the mammogram screening events or the Pap smear events to batch process. Then, click the **Batch Process** button or select **Batch Process** on the context menu to batch process the selected events and to change the Status/State to **Closed**. The selected events must be of the same type of event, either all mammogram screenings or all Pap smears.

- If the user selected the mammogram screening events that are eligible for this process, the application displays the CMET Batch **Mammogram Screening** dialog. Section 4.1.4 provides for more information about this dialog.
- If the user selected the Pap smear events that are eligible for this process, the application displays the **CMET Batch Pap Smear** dialog. Section 4.1.5 provides for more information this dialog.

4.1.3.6 Create a Panel Button

Use the **Create Panel** function to create a panel from selected events. The patients associated with the events become the patients in the new panel. Select the events and then click the **Create Panel** button (or select **Create Panel** on the context menu) to access the **Create Panel** dialog.

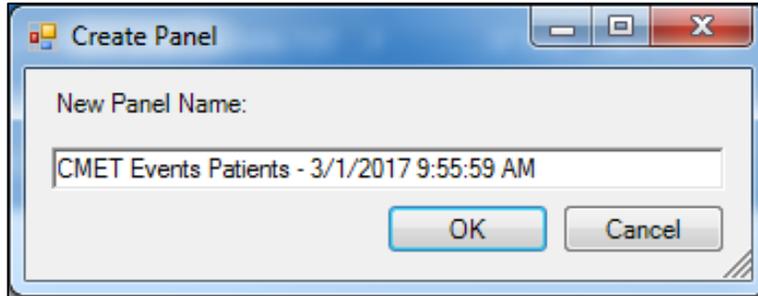


Figure 4-10: **Create Panel** dialog

Change the name of the new panel in the **New Panel Name** Free Text field (Section 8.2).

Click **OK** to create the panel (otherwise, click **Cancel**). After the Create process finishes, the application displays a message: “Panel created successfully!” Click **OK** to dismiss the message. The new panel is listed on the **Panel List** window. It uses the **No Predefined Population Search - Add Patients** manually population search option.

4.1.3.7 **Status of Background Jobs**

To check on the status of the background jobs, do one of the following:

- Click the **Background Jobs** (📄) button.
- Select **File | Background Jobs**.

The **RPMS iCare - Background Jobs** window displays.

4.1.4 **CMET Batch Mammogram Screening Dialog**

The batch process for mammogram screenings changes the events to have a Status of Tracked, the Event State of Closed, and the Close Reason of Event Complete.

CMET Batch Mammogram Screening

Batch Parameters
 Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram
 The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram), Follow up Date and Notification Type can be changed

Status: TRACKED

Event Finding*: BI-RAD CATEGORY 1 - NEGAT Finding Interpretation: Normal

Follow-up Event: MAMMOGRAM SCREENING Follow-up In*: 1 year

Notification Type*: LETTER Notification Date*: 06/27/2010

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Add (F2) Delete (Del)

Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010

OK Cancel

Figure 4-11: **CMET Batch Mammogram Screening** dialog

After completing the dialog, click **OK** to save the data. (Otherwise, click **Cancel**.)

4.1.4.1 Fields on the Dialog

Required fields are marked by an asterisk (*) following the field name.

Status: This is the status of the event (view only).

Event Finding*: This indicates the event finding. The list contains the options to populate/change this field.

Finding Interpretation: This field provides the interpretation of the finding (view only).

Follow-up Event: This is the follow-up event (view only).

Follow-up In*: This is the time frame for the follow-up. The list contains the options to populate/change this field.

Notification Type*: This is the type of patient notification for the event. Select an option from the list. The options on the list are defined by the application (sites cannot add values).

Create: The **Create** button is active when the **Notification Type** is Letter, Certified Letter, or Telephone. This function requires an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. Section 4.6 provides for more information on this dialog.

Notification Date*: This is the date for the patient notification. The list contains a calendar from which to select a date.

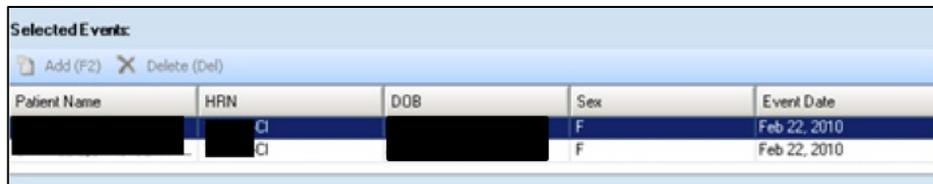
Event State: This shows the state of the event (view only).

Close Reason: This is the reason why the status is closed (view only).

Comment: Use this Free Text field (Section 8.2) to enter any comments pertaining to the mammogram screenings.

4.1.4.2 Selected Events Group Box

The **Selected Events** group box contains the selected patients for batch processing (these are the events selected for the process). This is read-only information.



Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010
[REDACTED]	[REDACTED]	[REDACTED]	F	Feb 22, 2010

Figure 4-12: **Selected Events** group box

4.1.5 CMET Batch Pap Smear Dialog

The batch process for Pap smears changes the events to have a Status of **Tracked**, the Event State of **Closed**, and the Close Reason of **Event Complete**.

CMET Batch Pap Smear

Batch Parameters
Batch Processing can only be used for multiple patients who have normal results for either a Pap Smear or a Screening Mammogram.
The CMET Package Manager sets the parameters for batch processing for the entire site. If you do not have CMET Package Manager Access, you will not be able to edit these parameters. Values for the Findings (Screening Mammogram): Follow up Date and Notification Type can be changed.

Status: TRACKED

Event Finding: NEGATIVE Finding Interpretation: Normal

Follow-up Event: PAP SMEAR Follow-up In*: 1 year

Notification Type*: LETTER Notification Date*: 06/27/2010

Create

Event State: CLOSED Close Reason: Event Complete

Comment:

Selected Events:

Add (F2) Delete (Del)

Patient Name	HRN	DOB	Sex	Event Date
	CI		F	Jul 02, 2009
	CI		F	Jul 06, 2009
	CI		F	Jul 06, 2009

OK Cancel

Figure 4-13: CMET Batch Pap Smear dialog

After completing the dialog, click **OK** to save the data. (Otherwise, click **Cancel**.)

4.1.5.1 Fields on the Dialog

Required fields are marked by an asterisk (*) following the field name.

Status: This field displays the status of the event (view only).

Event Finding: This indicates the event finding (view only).

Finding Interpretation: This provides the interpretation of the finding (view only).

Follow-up Event: This displays the follow-up event (view only).

Follow-up In*: This is the time frame for the follow-up. The list contains options to populate/change this field.

Notification Type*: This is the type of patient notification for the event. Select an option from the list. The options on the list are defined by the application (sites cannot add values).

Create: The **Create** button is active when the **Notification Type** is Letter, Certified Letter, or Telephone. This function requires an electronic signature on file. Click the **Create** button to access the **Add New TIU Note - Batch Mode** dialog. Section 4.7 provides for more information about this dialog.

Notification Date*: This is the date for the patient notification. The list contains a calendar from which to select a date.

Event State: This shows the state of the event (view only).

Close Reason: This is the reason when the status is closed (view only).

Comment: Use this Free Text field (Section 8.2) to enter any comments pertaining to the Pap smear screenings.

4.1.5.2 Selected Events Group Box

The **Selected Events** group box contains the selected patients for batch processing (these are the events selected for the process). This is read-only information.



Patient Name	HRN	DOB	Sex	Event Date
[REDACTED]	CI	[REDACTED]	F	Jul 02, 2009
[REDACTED]	CI	[REDACTED]	F	Jul 06, 2009
[REDACTED]	CI	[REDACTED]	F	Jul 06, 2009

Figure 4-14: **Selected Events** group box

4.2 Tracked Events Sub-Tab

The **Tracked Events** sub-tab displays all events at your site that have been selected to be **Tracked**. This could be a very large number of events; limit this display by applying additional filters to the view. Filtering in this manner does not affect the routine background job.

Category	1 - Event	Event Date	Result	2 - Finding(s)	Findings Summary	Interpr
BREAST	BREAST REDUCTION	Feb 09, 2017				
CERVICAL	PAP SMEAR	Feb 27, 2017		✓	Finding: HSIL Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 08:00:31	Abnorm
	PAP SMEAR	Feb 27, 2017		✓	Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 08:19:23	Norma
	PAP SMEAR	Feb 27, 2017		✓	Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 11:19:26	Norma
STI	CHLAMYDIA SCREEN	Feb 27, 2017		✓	Finding: NEGATIVE Finding Date: FEB 27, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 27, 2017 14:09:27	Norma
	CHLAMYDIA SCREEN	Feb 23, 2017		✓	Finding: NEGATIVE Finding Date: FEB 23, 2017 Finding Entered By: [REDACTED] Finding Entered Date/Time: FEB 23, 2017 10:19:06	Norma
	CHLAMYDIA SCREEN	Feb 23, 2017				
	CHLAMYDIA SCREEN	Feb 23, 2017				
	CHLAMYDIA SCREEN	Feb 16, 2017				
	CHLAMYDIA SCREEN	Jan 18, 2017				
	CHLAMYDIA SCREEN	Jan 18, 2017				

Figure 4-15: Tracked Events sub-tab

Findings are abbreviated results and have been predefined for each event. Results are received and reviewed by the clinician and the appropriate Finding value is entered. Multiple Findings can be entered for each Event. Each Finding value has an associated, auto-assigned Interpretation of either Normal, Abnormal, or NA.

The CMET Worksheet is used to capture CMET activity for individual patients.

Batch Processing can be used to process multiple patients with normal results for Pap Smear or Mammogram Screenings.

The information on this sub-tab is divided into three general areas: Tips information, Tracked Events data, and Filter.

The Tips information provides an overview of the sub-tab. Collapse this information to expand the view for the Tracked Events data.

The Filters area provides filters for applying filter criteria to the tracked events data. Collapse this area to have more room for viewing the tracked events data.

Note: Users can set the default collapse status for the Tips and Filters areas on this sub-tab. To do so, select **Tools | User Preferences | CMET tab | Tracked Events sub-tab**. The check boxes on this sub-tab will establish the collapse status.

The default filters are established on the **CMET** tab (**Tracked Events** sub-tab) of user preferences. These filters are: Category, State, Time Frame, and Community. Section 4.2.1 provides for more information about these filters.

Users can also filter the columns on the **Tracked Events** sub-tab. This is a temporary filter that will be lost after the user exits the application.

4.2.1 Filter Group Box (Tracked Events)

Use the filter features in the **Filters** group box. Users can filter the events by one or more of the following: Category, State, Time Frame, and Community. Then click the **Get Events** button to re-display the events.

The **Get Events**, **Save**, and **Restore to User Pref** buttons function like those on the **Events** sub-tab.

4.2.2 Tracked Events Sub-Tab Layout

The data on the **Tracked Events** sub-tab is effective as of the date/time on the toolbar.

Table 4-2 provides information about the columns on the **Tracked Events** sub-tab.

Table 4-2: Tracked Events column names and meanings

Column Name	Meaning
Category	The name of the category for the tracked event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
1 - Event	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Event Date	The date the event was performed.
Result	The date the result was entered. Hover help will describe where the result came from (V-RADIOLOGY, V-LAB).
2 - Finding(s)	Icon that indicates if the event has any Findings.
Finding Summary	Summary of findings.
Interpretation	The interpretation of the selection in the Result field. There is hover help for this field, e.g., CMET, that refers to where the interpretation was obtained.
3 - Follow-up(s)	Icon that indicates if the event has any follow-up data.
4 - Patient Notification(s)	Icon that indicates if the event has any patient notification data.
State	The state of the tracked event (open or closed). The default is OPEN.
Patient Name	Required field that will link to the Tracked Events sub-tab of the CMET tab on the Patient Record by double-clicking on it.
HRN	Patient's Health Record Number (required).

Column Name	Meaning
DOB	Patient's date of birth (required)
Age	Patient's age today.
Sex	F (for female) or M (for male)
Community	Patient's community of residence.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function (Proposed or Accepted).
Tracked By	The person who tracked the event.
Tracked When	The date the event was tracked.

The use of icons (check marks and feathers) on this sub-tab creates an easy-to-read review of the CMET activity display.

The **Finding(s)** cell can contain the following:

- The feather () icon indicates that a Finding entry is overdue based on the Tickler Timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that the Finding has been entered. Hover the mouse over the icon to view the Finding Due Date and the Finding Value.
- An empty cell indicates that a finding has not been entered and is not past due.

The **Follow-up(s)** cell can contain the following:

- The feather () icon indicates that a recommended follow-up entry is overdue based on Tickler Timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that a follow-up has been entered. Hover the mouse over the icon to view the Follow-up Date and the Follow-up Type.
- An empty cell indicates that a decision regarding the Follow-up has not been entered and is not past due.

The **Patient Notification(s)** cell can contain one of the following:

- The feather () icon indicates that the type of patient notification is overdue based on Tickler Timeframes. Hover the mouse over the icon to view the Due Date.
- The check () icon indicates that the type of Patient Notification has been entered. Hover the mouse over the icon to view the notification date and type.
- An empty cell indicates that the type of Patient Notification has not been entered but is not past due.

Remember that Finding(s), Follow-up(s), and Patient Notification(s) are entered on the CMET Worksheet.

If a Community cell contains the **Community Alert** (🚨) icon, view the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the **Community** column.

View the **CMET -Visit Detail** Pop-up Functionality for any underlined date in the **Event Date** column by double-clicking the date.

Double-click the underlined date in the **Result Date** column to access a particular detail pop-up, for example, Women's Health Detail.

4.2.3 Buttons on Tracked Events Sub-Tab

4.2.3.1 Reopen

Use the Reopen function to change a Closed event to Open. Select only one event with a State of Closed and then click the **Reopen** button (or select **Reopen** on the context menu). The application displays the **RPMS iCare – Reopen Tracked Event** dialog.

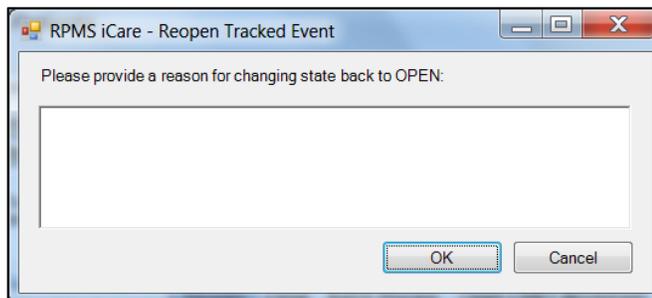


Figure 4-16: **RPMS iCare – Reopen Tracked Event** dialog

Type the reason for changing the state back to Open in the Free Text field (not required; see Section 8.2 for details on pop-up functionality). When the dialog is complete, click **OK** to change the State for the event to **Open**. (Otherwise, click **Cancel**.)

If the user selects more than one event and uses the **Reopen** function, the application displays the warning message: “Please reselect as only one event can be reopened at one time.” Click **OK** to close the warning message and select only one event to continue.

4.2.3.2 Close

Use the **Close** function to change an Open event to Closed. Select the events with a State of Open and then click the **Close** button (or select **Close** on the context menu). The application displays **RPMS iCare – Reason for Closing** dialog.

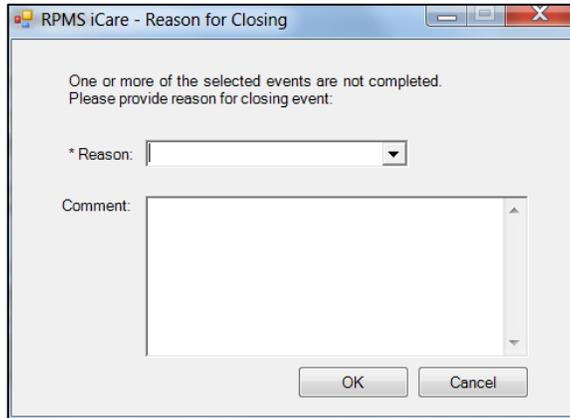


Figure 4-17: **RPMS iCare – Reason for Closing** dialog

Required fields are marked by an asterisk (*) following the field name.

Reason*: Select an option from the list—Event Complete, Patient Moved, Lost to Follow-up, Other (this option requires a comment).

Comment: This Free Text field (Section 8.2) is required when the Reason is set to **Other**. Type the text of the reason.

When the dialog is complete, click **OK** to change the State for the selected events to Close. (Otherwise, click **Cancel**.)

4.2.3.3 Batch Process

The Batch Process only applies to screening mammograms and Pap smears with normal results. This process works on Open events that have empty (no ticklers or check marks) in the Findings, Follow-up, and/or Patient Notifications columns.

If the user selects events that are not eligible for the Batch Process, the application displays the message: “Please select only Tracked Events without Findings, Follow-ups, or Notifications in order to process these as a batch.” Click **OK** to dismiss the message.

Select one or more eligible events and click the **Batch Process** button (or select **Batch Process** on the context menu).

For mammogram screenings, Section 4.1.4 for more information.

For Pap smears, Section 4.1.5 provides for more information.

4.2.3.4 Open CMET Worksheet

Select an event and then click the **Open CMET Worksheet** button (or select **Open CMET Worksheet** on the context menu) to access the CMET Worksheet (for the event). Enter Finding(s), Follow-up(s), and Patient Notification(s) for the event. Section 4.4 provides for more information about the worksheet.

Note: This function can be applied to only one event.

4.2.3.5 Create Panel

Use the **Create Panel** function to create a panel from the selected events. The patients associated with the events become the patients in the new panel. Select the events and then click the **Create Panel** button (or select **Create Panel** on the context menu).

4.2.3.6 Status of Background Jobs

To check on the status of the background jobs, do one of the following:

- Click the **Background Jobs** () button
- Select **File | Background Jobs**

The **RPMS iCare - Background Jobs** dialog displays.

4.3 Follow-up Events Sub-Tab

The **Follow-up Events** sub-tab contains events with a recommended follow-up. This sub-tab displays all of the follow-up events at your site that have been generated by all CMET users. This can be a very large number of events; limit this display by applying filters to the view. Filtering in this manner does not affect the routine background job.

4.3.1 Filters Group Box (Follow-up Events)

Use the filter features shown under the **Filters** group box. Users can filter the events by using one or more of the following: Category, Time Frame, Community. Then, use the **Get Events** button to redisplay the events. Section 4.1.1 provides for more information about using the filters.

The **Get Events**, **Save**, and **Restore to User Pref** buttons work like those on the **Events** sub-tab. Section 4.1.3 provides for more information about this sub-tab.

4.3.2 Follow-up Events Sub-Tab Layout

The data on the **Follow-up Events** sub-tab is effective as of the date/time on the toolbar. Users can sort/filter the columns and perform other functions on the columns.

Table 4-3 provides information about the columns on the **Follow-up Events** sub-tab.

Table 4-3: Follow-up sub-tab column names and meanings

Column Name	Meaning
Category	The name of the category for the follow-up event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
Follow-up Event Name	The name of the event. This is the recommended follow-up entered in CMET.
Follow-up Event Date	The date of the recommended follow-up.
Preceding Event	This is the date of the preceding event. When a user double-clicks on the underlined date, the application opens to the Tracked Events of the CMET tab on the Patient Record. The chain of events in the same category is revealed. In addition, there is hover help when moving the mouse over the date (for example, PAP SMEAR).
Patient Name	Patient's name.
HRN	Patient's Health Record Number.
DOB	Patient's date of birth.
Age	Patient's current age.
Sex	F (for female) or M (for male)
Community	Patient's community of residence.

If a Community cell contains the **Community Alert** ( icon), view the Community Alert text by hovering the mouse over the icon. The icon does not affect the sorting of the **Community** column.

Double-click any event (not on the **Preceding Event** cell), and the application displays the CMET Worksheet for the event. Section 4.4 provides more information about the worksheet.

4.3.3 Buttons on Follow-up Events Sub-Tab

The **Create Panel**, **Open CMET Worksheet**, and **Status of Background Jobs** buttons work like those on the Tracked Events sub-tab. Section 4.2.3 provides more information on the buttons.

4.4 CMET Worksheet

Use the **Open CMET Worksheet** button to access the CMET Worksheet for a selected event on the particular sub-tab of the CMET window. Find this button on the **Tracked Events** and **Follow-up Events** sub-tab on the CMET main window.

Use this worksheet to process the Care Management Events to track. Enter data related to Findings, Follow-up, and Patient Notification. The Site parameters **Due By** default dates set by the CMET Package Manager can also be edited in this screen.

Figure 4-19: **CMET Worksheet** dialog

When the worksheet is complete, click **OK** (otherwise, click **Cancel**).

After clicking **OK**, there are two cases:

- Case 1: If not all of the steps are complete, the application updates the data on the **Tracked Events** sub-tab.
- Case 2: If all of the steps are complete, the application displays the **Close Event** information message that states: “The event is eligible for closing as all four steps are completed. Do you want to close the event now?” Click **Yes** to close the event. Click **No** to keep the event open.

Close the event (by selecting **Yes** on the **Close Event** message) and the application displays the **RPMS iCare Reason for Closing** dialog. Select a reason for closing the event and provide a comment (required) about the closing. Click **OK** to save the reason for closing (otherwise, click **Cancel**).

After clicking **OK** on the **Reason for Closing** dialog, the application displays the **Save to RPMS?** dialog: “You have data changes pending. Do you want to save to RPMS now?” Click **Yes** to save the changes to RPMS. Click **No** to discard the changes.

After clicking **Cancel**, there are two cases:

- Case 1: If there are no changes on the worksheet, the application closes it.
- Case 2: If there are changes on the worksheet, the application displays the **Save to RPMS?** dialog: “You have data changes pending. Do you want to save to RPMS now?” Click **Yes** to save the changes to RPMS. Click **No** to discard the changes. Click **Cancel** to return to the CMET Worksheet.

4.4.1 Patient Demographics Group Box

The **Patient Demographics** group box shows the patient’s name, HRN, Sex, Age, and DOB.

4.4.2 1 - Event Group Box

The data in the **1 – Event** group box provides information about the event and allows users to change the State of the event, as well as provide comments about the Event and/or State. In addition, users can view the audit history of the event.

1 - Event			
Event:	PAP SMEAR	Tracked By:	[REDACTED]
Event Date:	MAY 12, 2014	Tracked Date:	JUN 11, 2014 11:19:14
Category:	CERVICAL	State:	CLOSED
Preceding Event:	NONE	Close Reason:	Event Complete
CMET Audit History:	View	Event Comment:	[Text Area]
		State Comment:	[Text Area]

Figure 4-20: 1 – Event group box

State: This field defines the State of the event.

If the user populates the **State** field with Closed, the **Close Reason** field becomes active. Select an option from the list that describes the reason for closing the event.

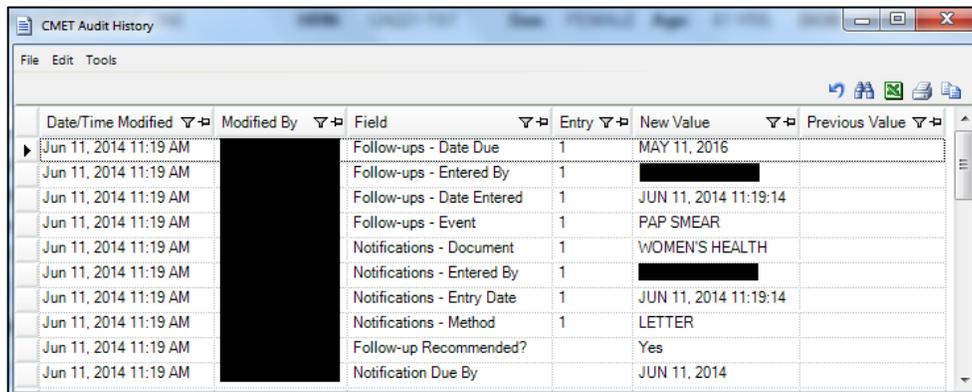
When an Event has a State of Closed, the other group boxes (Findings, Follow-up, Patient Notifications) will be inactive.

Event Comment: Use this Free Text field to add comments about the Event.

State Comment: Use this Free Text field to add comments about the State.

Note: See Section 8.2 for more information on Free Text fields.

CMET Audit History: If the user clicks the **View** label, the application will display the **CMET Audit History** pop-up.



Date/Time Modified	Modified By	Field	Entry	New Value	Previous Value
Jun 11, 2014 11:19 AM		Follow-ups - Date Due	1	MAY 11, 2016	
Jun 11, 2014 11:19 AM		Follow-ups - Entered By	1		
Jun 11, 2014 11:19 AM		Follow-ups - Date Entered	1	JUN 11, 2014 11:19:14	
Jun 11, 2014 11:19 AM		Follow-ups - Event	1	PAP SMEAR	
Jun 11, 2014 11:19 AM		Notifications - Document	1	WOMEN'S HEALTH	
Jun 11, 2014 11:19 AM		Notifications - Entered By	1		
Jun 11, 2014 11:19 AM		Notifications - Entry Date	1	JUN 11, 2014 11:19:14	
Jun 11, 2014 11:19 AM		Notifications - Method	1	LETTER	
Jun 11, 2014 11:19 AM		Follow-up Recommended?		Yes	
Jun 11, 2014 11:19 AM		Notification Due By		JUN 11, 2014	

Figure 4-21: **CMET Audit History** pop-up

Because multiple users work on events, the Audit History provides a history of those activities.

State: This determines the state of the event, either Open or Closed. If the state is set to **Closed**, the **Close Reason** field becomes active.

If the state is Closed, all of the other group boxes (**2 - Findings**, **3 - Follow-ups**, **4 - Patient Notifications**) become inactive.

Close Reason: This field is active when the State is **Closed**. Select an option from the list that provides the reason for closing the event.

4.4.3 2 - Findings Group Box

Use the **2 – Findings** group box to enter Findings data about the event.



Figure 4-22: **2 – Findings** group box

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the other group boxes (e.g., **Follow-ups** and **Patient Notifications**).

Populate the **Findings Due By**, **Result**, and **Follow-up Recommended?** fields by using the **Add** button on the grid and saving the record.

Findings Due By: This field displays the date the findings of this event are due. If this date passes without an entry, a Tickler (a reminder marked by a **Feather** icon) is generated.

Result: This field displays the date of the result. If this field contains an underlined date, click on the date to display the detail of the result. For example, below is the **Radiology Case Number Detail** pop-up (see Section 8.6 for pop-up functionality).

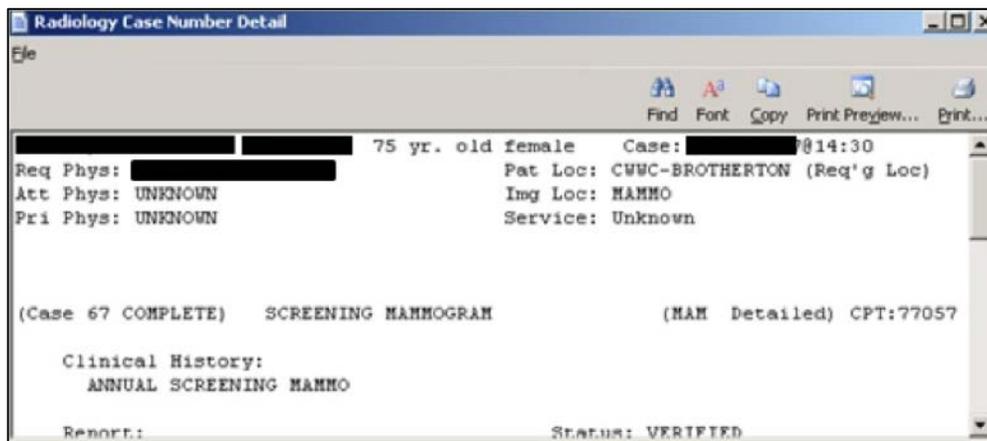


Figure 4-23: **Radiology Case Number Detail** dialog

Follow-up Recommended?: This field indicates if follow-up is recommended (Yes or No).

4.4.3.1 Add Button

Use the **Add** button to create a new Findings record. Click the **Add** button (or press F2 on the keyboard) to access the **Findings** dialog.

Figure 4-24: **Findings** dialog

Required fields are marked by an asterisk (*) following the field name.

Date*: Click the box and select a date for the finding.

Finding*: This is the finding associated with the event. Use an option from the list to populate this field.

Interpretation: The application populates this field, based on the selection in the **Finding** field.

Comment: Type the text of the comments about the Finding, if appropriate, in this Free Text field (Section 8.2).

Follow-up Needed: Use an option from the list: **Yes** or **No**.

Click **OK** to save the data on the **Findings** dialog (otherwise, click **Cancel**).

After saving the data, the application populates the grid with the record and populates the **Last Edited** (current logon user) and **Last Edited By** (current date) columns.

Saving and selecting **Yes** for the **Follow-up Needed?** field on the **Findings** dialog will cause the **Follow-up Recommended?** field on the grid to be populated with **Yes**. The application will automatically display the Follow-Ups dialog (where users can enter follow-up data).

4.4.3.2 Delete Button

The **Delete** function applies to events that had Findings entered but *not* saved.

If the user selects an event that is not eligible for the **Delete** function, the application displays the message: “Unable to delete a previously saved entry. Please mark as ‘Entered in Error’ instead.” Click **OK** to dismiss the message.

Select one or more eligible Findings records to delete and click the **Delete** button (or press the **Delete** button). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.4.3.3 Error Button

Use the **Error** button when Findings records have been saved and cannot be deleted but should be marked as **Entered in Error**.

If the user selects a record that is not eligible for the Error function, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Findings records and click the **Error** button. After using this function, the application places a strikethrough mark on the record text.



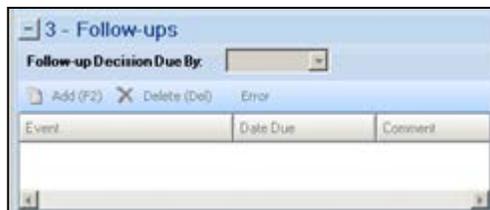
Date	Finding	Interpretation	Comment	Follow-Up Needed?	Last Edited	La
New 05_2010	BIPOD CATEGORY 2 - P	Abnormal				

Figure 4-25: Entered in Error example

After saving and returning to the **Tracked Events** tab, the **Result** column for the event will be blank for the particular event.

4.4.4 3 - Follow-ups Group Box

Use the **3 – Follow-ups** group box to add follow-up data about the event.



3 - Follow-ups

Follow-up Decision Due By:

Add (F2) Delete (Del) Error

Event	Date Due	Comment

Figure 4-26: **3 – Follow-ups** group box

The **Follow-ups** group box becomes active when the **Follow-up Recommended** field (in the **Findings** group box) is set to Yes.

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the other group box (e.g., **Patient Notifications**).

Follow-up Decision Due By: Select a date from the list that indicates when the follow-up decision should be made. Populating the field creates a tickler (**Feather** icon) for the event. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters. Populate this field with the date to take action on the event.

4.4.4.1 Add Button

Use the **Add** button to create a new Follow-up record. Click the **Add** button (or press F2) to access the **Follow-Ups** dialog.

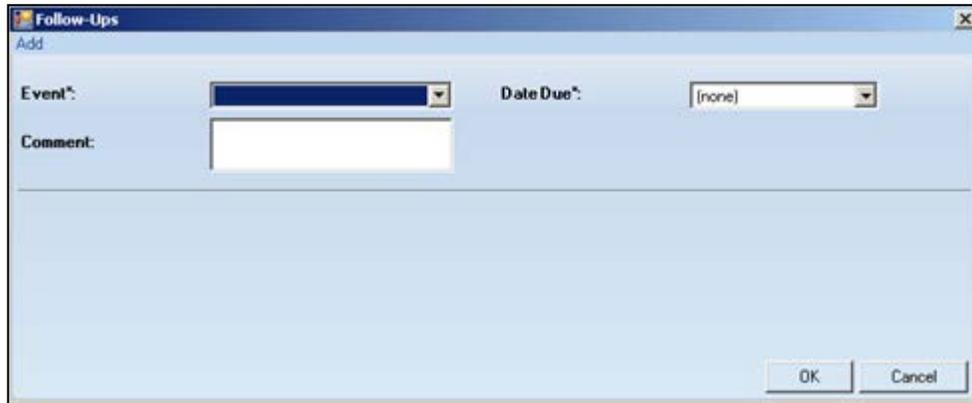


Figure 4-27: **Follow-Ups** dialog

Required fields are marked by an asterisk after the field name.

Event*: Select an option from the list that describes the Event for the follow-up.

Date Due*: Use the list to display a calendar from which to select the due date for the follow-up event.

Comment: Type text in this Free Text field (Section 8.2) to add comments about the follow-up.

Click **OK** to save the data on the dialog (otherwise, click **Cancel**). After saving, the follow-up record will display in the **3 - Follow-ups** group box on the CMET Worksheet.

4.4.4.2 Delete Button

The **Delete** function applies to events that had Follow-ups entered but *not* saved.

Select one or more eligible Follow-up records to delete and click the **Delete** button (or press the **Delete** button on the keyboard). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.4.4.3 Error Button

Use the **Error** button when Follow-up records have been saved and cannot be deleted but should be marked as **Entered in Error**.

If the user selects a record that is not eligible for the Error button, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Follow-up records and click the **Error** button. After using this function, the application places a strikethrough mark on the text of the record.

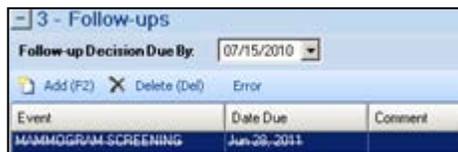


Figure 4-28: Follow-up record marked as entered in error

4.4.5 4 - Patient Notifications Group Box

Use the **4 – Patient Notifications** group box to add patient notification data about the event.



Figure 4-29: 4 – Patient Notifications group box

The **Patient Notification**, the final step, alerts the patient of both the results and the recommendations for follow-up. Multiple types of Patient Notifications can be entered for each Event.

The **Patient Notifications** group box becomes active when a finding is entered in the **Findings** group box.

Minimize this group box by clicking the collapse button in the upper left corner. This allows more room for viewing the Follow-ups group box.

Notification Due By: Enter the date to notify the patient about the results and recommendations of the follow-up related to this event. If this date passes without an entry, a tickler (feather) icon will be generated. In certain cases, this date is populated by the Tickler Timeframe set in the site parameters.

4.4.5.1 Add Button

If a default clinic is not defined in user preferences, the application displays the following message: “You must select default clinics in user preferences before being able to enter notes.” Click **OK** to dismiss the message. Select **Tools | User Preferences** to access the **RPMS iCare – User Preferences** dialog. Click the **Patient View** tab to enter the clinic codes.

Use the **Add** button to create a new Patient Notification record. Click the **Add** button (or press F2) to access the **Notifications** dialog.

Figure 4-30: **Notifications** dialog

Required fields are marked with an asterisk (*) after the field name.

Date*: The default date is today’s date. Change it by clicking the list to access a calendar and select another date.

Method*: Select an option from the list that identifies the type of notification.

Create: This button becomes active when selecting **Certified Letter**, **Letter**, or **Telephone** in the **Method** field. An electronic signature must be on file before using this function.

If an electronic signature is on file, click the **Create** button to access the **Add TIU Note** dialog.

Comment: Use this Free Text field (Section 8.2) to add any comments about the notification.

After completing this dialog, click **OK** to save the data (otherwise, click **Cancel**). After saving, the notification record will display in the **4 - Patient Notifications** group box on the CMET Worksheet.

4.4.5.2 Delete Button

The Delete function applies to events with Patient Notifications entered but *not* saved.

Select one or more eligible Patient Notification records to delete and click the **Delete** button (or press Delete on the keyboard). The application displays the **Delete Row** information message, confirming the deletion. Click **Yes** to delete the selected records. Otherwise, click **No**.

4.4.5.3 Error Button

Use the **Error** button when Patient Notification records have been saved and cannot be deleted and need to be marked as Entered in Error.

If the user selects a record that is not eligible for the Error function, the application displays the message: “Unable to mark as ‘Entered in Error’ because the entry has not been saved in RPMS. Please delete the entry instead.” Click **OK** to dismiss the message.

Select one or more eligible Patient Notification records and click the **Error** button. After using this function, the application displays a strikethrough mark on the text of the record.

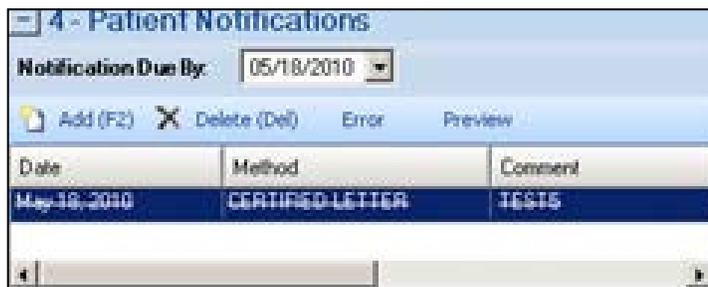


Figure 4-31: Patient Notification record marked as entered in error

4.4.5.4 Preview

Use the Preview function to preview the letter associated with the selected Patient Notification record. This function only applies to records that are Letters, Certified Letters, or Telephone.

Select the record to preview and click the **Preview** button. The application displays the **Letter Preview** pop-up (see Section 8.6 for pop-up functionality).

Figure 4-32: **Letter Preview** pop-up

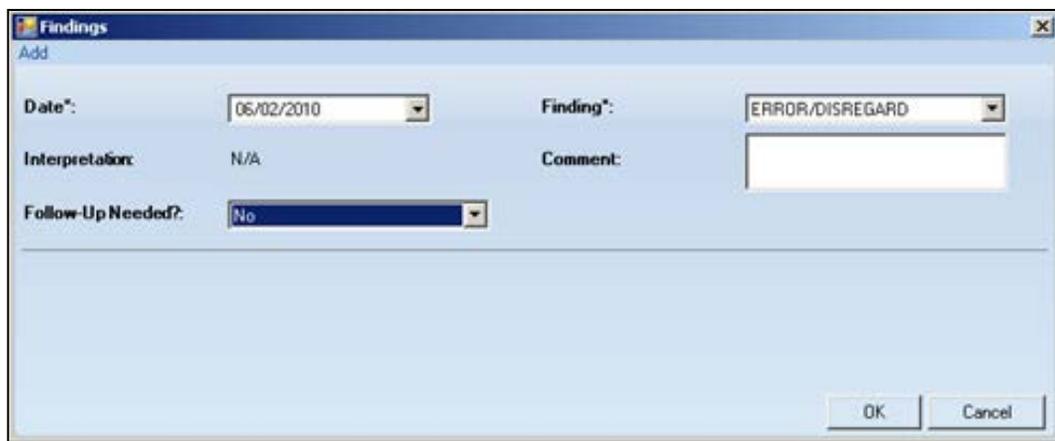
4.4.5.5 Print Button

Use the **Print** button to output a letter in a selected record. After clicking **Print**, the application displays the **Print** dialog where the user specifies the printer, page range, number of copies, etc.; this dialog works like the one in Microsoft Office.

4.5 Erroneously Tracked Events

Once an event has been Tracked, it cannot be changed to Not Tracked. Use the following process when an event is erroneously Tracked.

1. Go to the **Tracked** tab, in any view (Main, Panel, Patient Record) and open a CMET worksheet for the event erroneously tracked. Click the **Add** button in the Findings area to access the **Findings** dialog.

Figure 4-33: **Findings** dialog populated

Select the **ERROR/DISREGARD** option in the **Findings** field. Select the option **No** in the **Follow-Up Needed?** field. Use today's date for the **Date** field. Click **OK** to save and close the dialog.

2. Go to the **Patient Notifications** area of the CMET Worksheet and click the **Add** button. The application displays the **Notifications** dialog.



Figure 4-34: **Notifications** dialog populated

Use the **NONE** option for the **Method** field. It is recommended to add a comment in the **Comment** field (such as “entered in error”) and to use today’s date for the **Date** field. Click **OK** to save and close the dialog.

3. The application will display the **Close Event** information message.



Figure 4-35: **Close Event** information message

Click **Yes** to close the message.

4. The application will display the **RPMS iCare – Reason for Closing** dialog.



Figure 4-36: **RPMS iCare – Reason for Closing** dialog

Select the option **Other** for the **Reason** field. Enter a comment in the **Comment** field. Click **OK** to save and to close the dialog.

5. The application will display the **Confirm save to RPMS** information message.



Figure 4-37: **Confirm save to RPMS** information message

Click **Yes** on the message to save the data to RPMS and close the message.

This process causes the particular event to have a State of Closed.

4.6 Using Create Button on Batch Processing Window

On the **CMET Batch Mammogram Screening** or **CMET Batch Pap Smear** window, click the **Create** button to access the **Add TIU Note – Batch Mode** dialog.

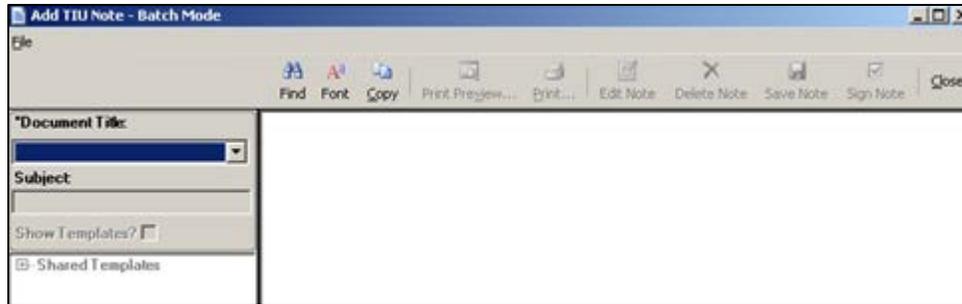


Figure 4-38: **Add TIU Note – Batch Mode** dialog

4.6.1 Fields

Both fields are required.

Document Title: Select an option from the list to establish the title of the TIU note.

Subject: Use this Free Text field (Section 8.2) to enter the subject of the TIU note.

At this point, the user can do one of the following: not use a template (see Section 4.7.1.1 for details) or use a template (see Section 4.7.1.2 for details).

4.6.1.1 Buttons

The **Find**, **Font**, **Copy**, **Print Preview**, and **Print** buttons on this dialog work like those on the pop-up window (see Section 8.6).

Adjust the font size before saving the note. Using this process will save the note in an appropriate font size for output (later).

Save Note: Click this button to save the current note.

Delete Note: Click this button to delete the current unsigned note. This button does not apply to signed notes.

Edit Note: Click this button to edit the text of an unsigned note.

Close: Click this button to close the **Add TIU Note – Batch Mode** dialog.

After clicking the **Close** button, the application closes the **Add TIU Note – Batch Mode** dialog.

Then the application displays the **Enter Electronic Signature** dialog.



Figure 4-39: **Enter Electronic Signature** dialog

Enter the electronic signature in the **Please sign** field and click **OK** (otherwise, click **Cancel**).

4.6.1.2 Printing the TIU Note

Click **OK** on the **Enter Electronic Signature** dialog, and the application displays the **Print TIU Notes** information message.

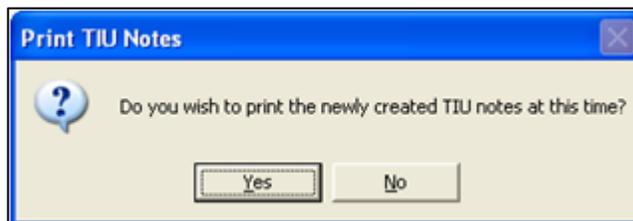


Figure 4-40: **Print TIU Notes** information message

Click **Yes** to print the TUI note. The application displays the **Print Preview** dialog. Print the TIU note from this dialog.

Click **No** to not print the TIU note. The application displays the **Print TIU Notes** information message. This presents a second opportunity to print the TUI note.

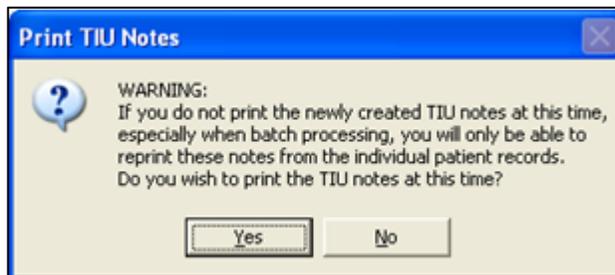


Figure 4-41: **Print TIU Notes** information message

Click **Yes** to print the TIU note at this time when batch processing. Otherwise, reprinting the note will only be available from the individual patient record.

Click **Yes**, and the application displays the **Print Preview** dialog. Print the TIU from this dialog.

4.7 Add TIU Note Dialog

The following information provides information about using the **Add TIU Note** dialog.

4.7.1 Using the Add a Note Button

Click the **Add Note** button to display the **Add a Note** dialog.

Click the **Create** button on the **Add a Note** dialog to display the **Add TIU Note** dialog.

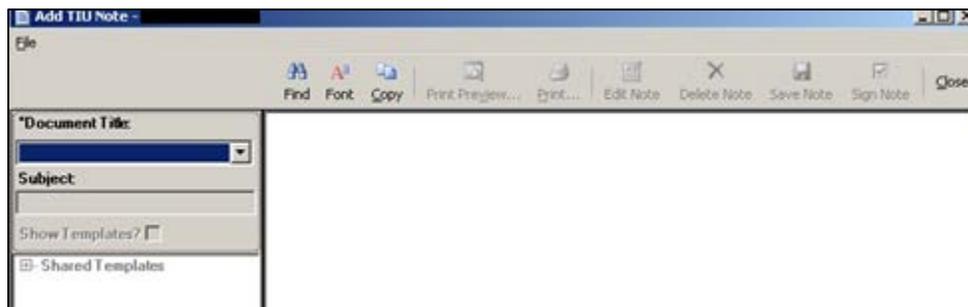


Figure 4-42: **Add TIU Note** dialog

Both fields are required.

Document Title: Select an option from the list to establish the title of the TIU note.

Subject: Use this Free Text field (Section 8.2) to enter the subject of the TIU note. This field becomes active after populating the **Document Title** field.

At this point, do one of the following: do not use a template (Section 4.7.1.1) or use a template (Section 4.7.1.2).

4.7.1.1 Note with No Template

Populate the **Document Title** and **Subject** fields, then type the text of the TIU note in Free Text area (Section 8.2) on the right side of the dialog.

When the text is complete, the following buttons are active: **Find**, **Font**, **Copy**, **Save Note**, **Sign Note**, **Close**. Section 4.7.1.3 provides for more information.

Figure 4-43 shows an example of the note after clicking the **Save Note** button.

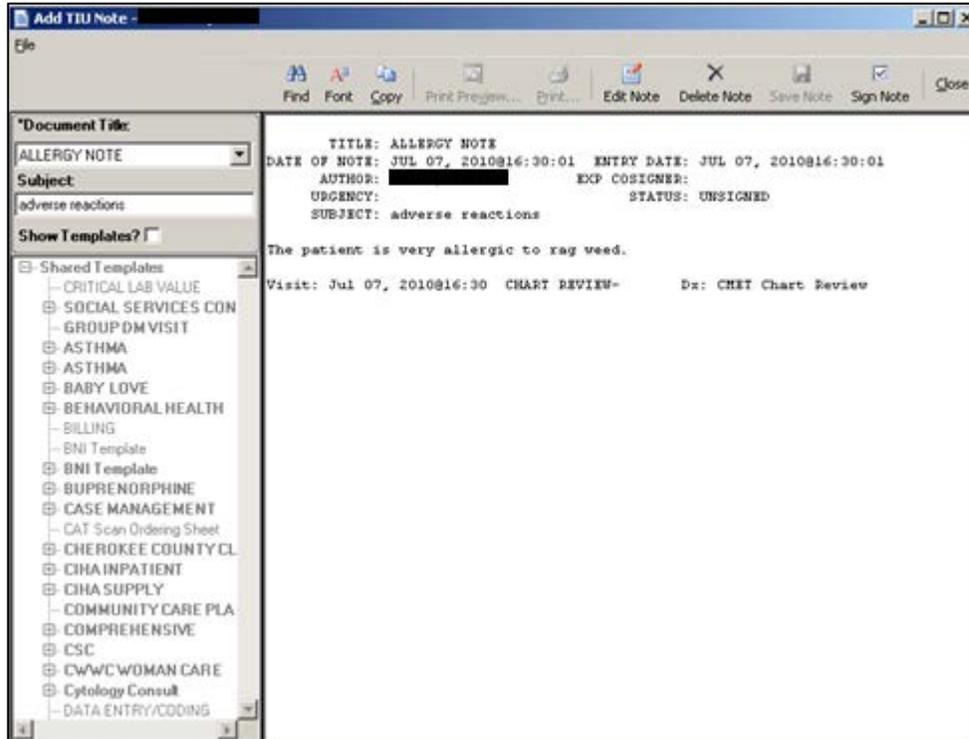


Figure 4-43: Add TIU Note dialog with note information

4.7.1.2 Note with Template

After populating the **Document Title** and **Subject** fields, select the **Show Template?** check box. This action displays the available templates. (Expand the **Shared Templates** option.) Find the appropriate template and double-click on its name to use it. The application will display the selected template.

Figure 4-44: **Template** dialog

Complete the template by using the buttons and check boxes on the template. The information completed on the template determines the text of the TIU note.

Click the **Preview** button on the **Template** window to preview the note in its current state.

Figure 4-45: **Template Preview** window – TIU note

What appears on the **Template Preview** pop-up determines what will be in the text of the TIU note. Close (select **File | Close**) the pop-up and return to the **Template** window.

After completing the **Template** window, click **OK** (otherwise, click **Cancel**), and return to the **Add TIU** dialog.

4.7.1.3 Buttons on Add TIU Note Dialog

Please note the following about the text of the TIU note:

- Line lengths should be less than 80 columns (characters), otherwise, the line spacing on the finished TIU note will not format correctly.
- The **Find**, **Font**, **Copy**, **Print Preview**, and **Print** buttons on this dialog work like those on the pop-up window (see Section 8.6 for pop-up functionality).
- Adjust the font size before saving the TIU note, if needed.

Delete Note: Click this button to delete the current unsigned note. (This button does not apply to signed notes.)

Save Note: Click this button to save the current note. After clicking the **Save Note** button, the note is saved, and the **Delete Note** and **Edit Note** buttons become active.

Sign Note: Click this button to electronically sign the selected unsigned TIU note. After clicking the **Sign Note** button (or selecting **File | Sign Note**), the application displays the **Enter Electronic Signature** dialog.



Figure 4-46: **Enter Electronic Signature** dialog

Enter the electronic signature in the Free Text field (Section 8.2) and click **OK** (otherwise, click **Cancel**). After clicking **OK**, the user returns to the **Add TIU Note** dialog. The text of the note shows that the note has been electronically signed.

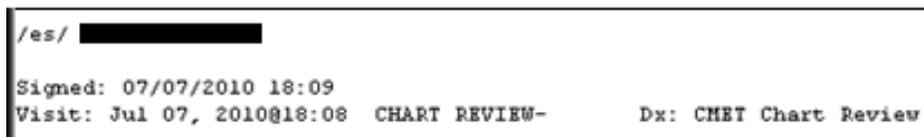


Figure 4-47: Electronic signature noted on text of TIU note

Edit Note: Click the **Edit Note** button to display the text of the note.



Figure 4-48: Example of note text

After editing the text of the note, click the **Save Note** button.

If the TIU note is signed, users cannot change the text; users can only view the text.

Close: Click this button to close the **Add TIU Note** (for patient) dialog. Click the **Close** button (or select **File | Close**) to close the dialog.

Return to the **Add a Note** dialog, with the **Preview** button next to the **Add Note** field.

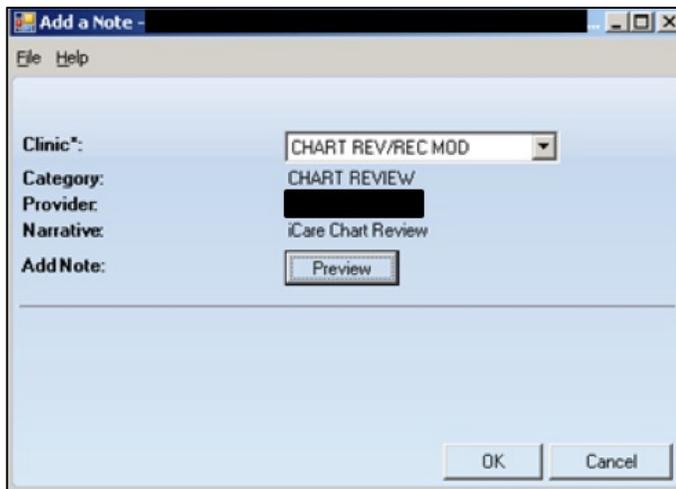


Figure 4-49: **Add a Note** dialog with **Preview** button

Click the **Preview** button to display the note text.

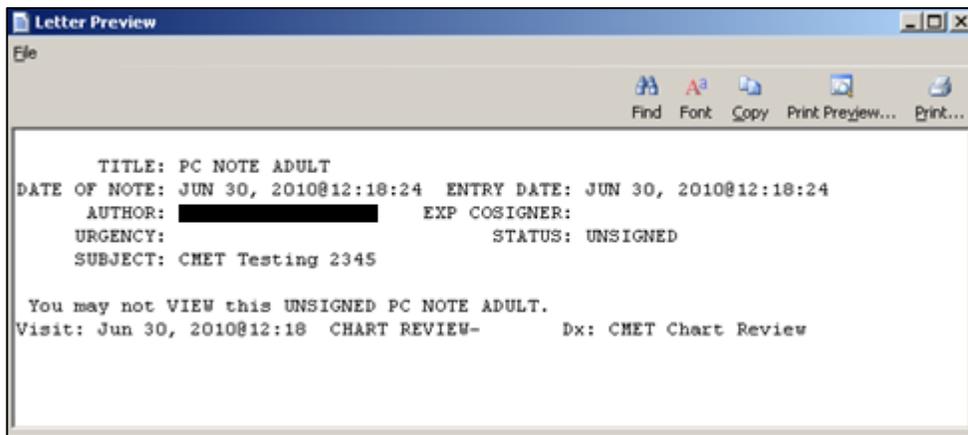


Figure 4-50: **Letter Preview** pop-up

Close the pop-up (see Section 8.6 for pop-up functionality) to return to the **Add a Note** dialog (with the **Preview** button on it).

After the **Add a Note** dialog is complete, click **OK** (otherwise, click **Cancel**).

After the user clicks **OK**, the application displays the **Enter Electronic Signature** dialog.



Figure 4-51: **Enter Electronic Signature** dialog

Enter the electronic signature in the Free Text field (Section 8.2). After completing the dialog, click **OK** (otherwise, click **Cancel**).

- If the user enters an invalid electronic signature and clicks **OK**, the application displays the **Invalid Attempt** information message: “Invalid electronic signature. Try again?” Click **Retry** to return to the **Enter Electronic Signature** dialog. Click **Cancel**, and the application displays the message: “Unable to save with a signed note.” Click **OK** to return to the **Add a Note** dialog.
- Click **Cancel**, and the application displays the message: “Unable to save with a signed note.” Click **OK** to dismiss the message.
- If the user enters a valid electronic signature and clicks **OK**, the application displays the information message: “This data will be saved to the RPMS server. Do you want to continue?” Click **Yes** to save and continue. Click **No** to discard the note and exit the dialog.

5.0 CMET Panel View

The **Care Management Event Tracking (CMET)** tab on the **Panel View** window provides the same view as CMET Main View, including information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs by only the patients in this selected panel.

The functionality is the same as Main View. Review Section 3.0 for more details on the CMET functionality.

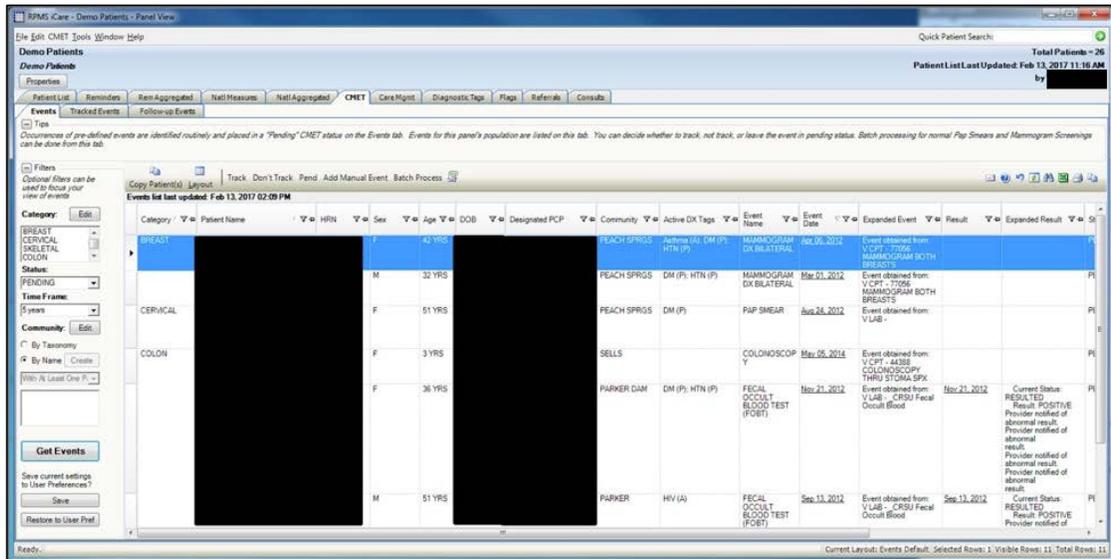


Figure 5-1: Events sub-tab

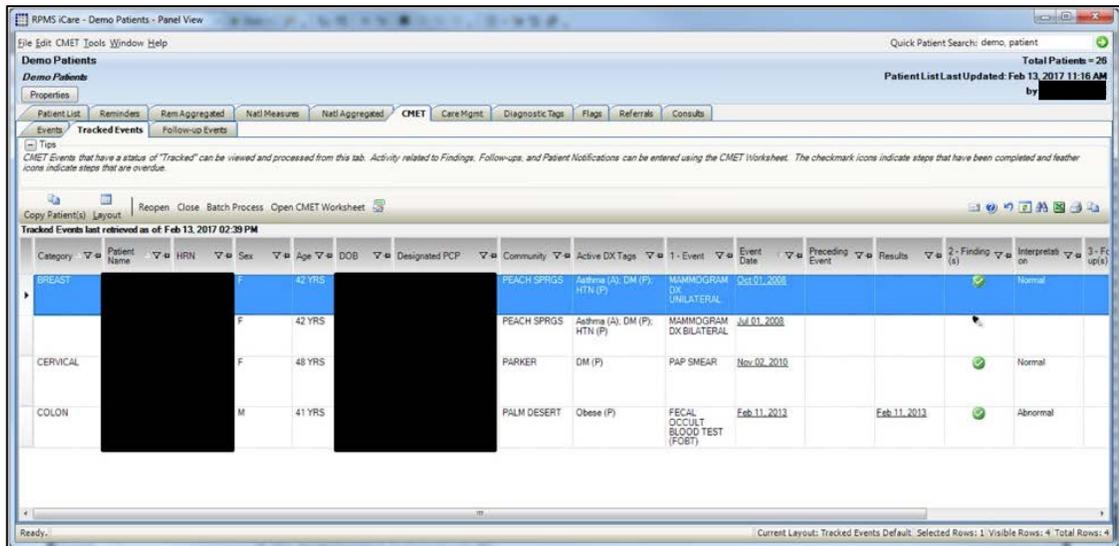


Figure 5-2: Tracked Events sub-tab

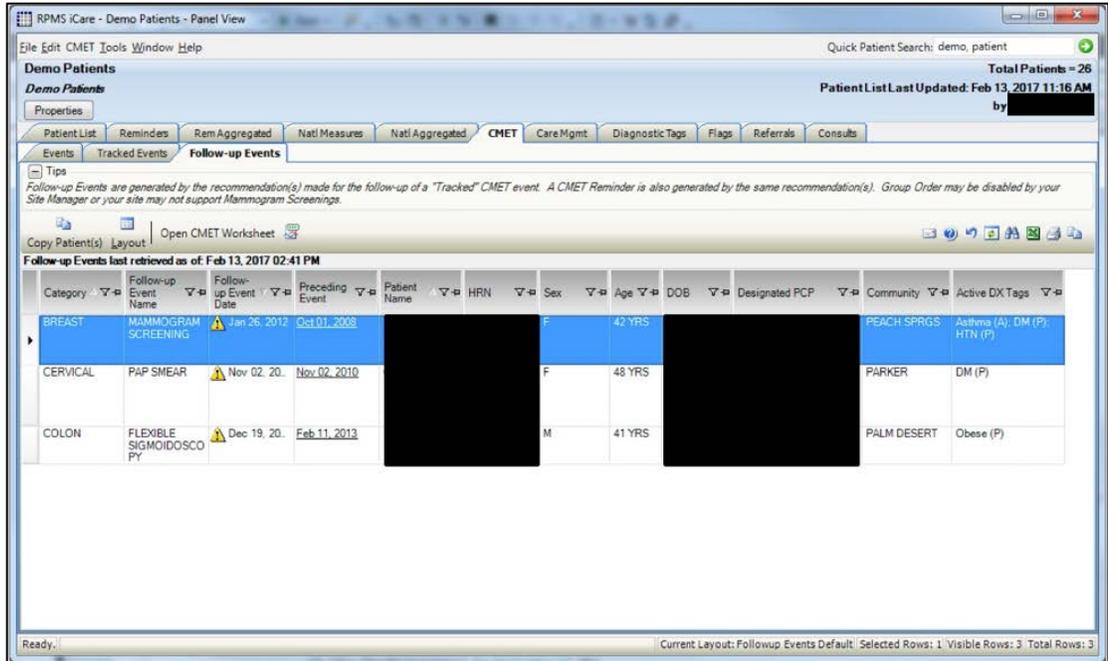


Figure 5-3: Follow-up Events sub-tab

6.0 CMET Patient View

The CMET Patient View is similar to the main view and the Panel View, with information on **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs by the selected patient. In addition, Patient View has a fourth sub-tab, called **Past Events**.

Name: DEMO, ALISTER LANE
HRNs: 124625-TST, 124626
Community: KINGMAN
Address: ALB, NEW MEXICO 87119
SSN: XXX-XX-XXXX
Sex: M
Age: 36 YRS
DOB: [REDACTED]
Phone: 555-555-5994
Work Ph.: [REDACTED]
Alt. Phone: [REDACTED]
Email: [REDACTED]
DPCP: [REDACTED]

Allergies: HYDROCHLOROTHIAZIDE

Barriers to Learning:

Events list current as of: Feb 13, 2017 02:57 PM

Category	Event Name	Event Date	Expanded Event	Result	Expanded Result	Status	Status Comment	Last Modified Date
BREAST	MAMMOGRAM SCREENING	Mar 13, 2014	Event obtained from: V POV - 793 89 ABN FINDING-BREAST NEC			TRACKED		Jun 10, 2014 08:19
LIVER	Hepatitis C Confirm	Jul 16, 2013	Event obtained from: V LAB - HEPATITIS C VIRUS RNA [Units/Vol]	Jul 16, 2013	Current Status: RESULTED Result: 7611200 Negative: < 0.8 Indeterminate 0.8 - 0.9; Positive: > 0.9. In order to reduce the incidence of a false positive result, the CDC recommends that all s/co ratios between 1.0 and 10.9 be confirmed with additional Verification or PCR	PENDING		Jan 06, 2016 02:53

Selected Rows: 1 | Visible Rows: 2 | Total Rows: 2

Figure 6-1: CMET Patient View – Events sub-tab

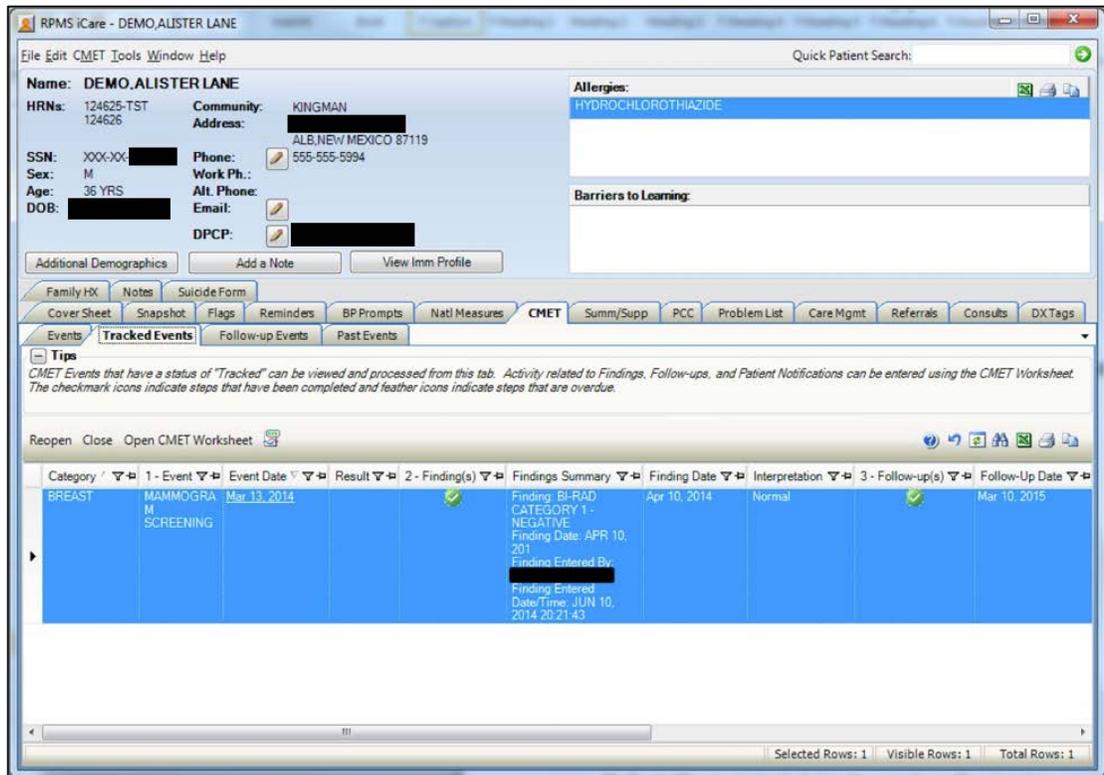


Figure 6-2: CMET Patient View – Tracked Events sub-tab

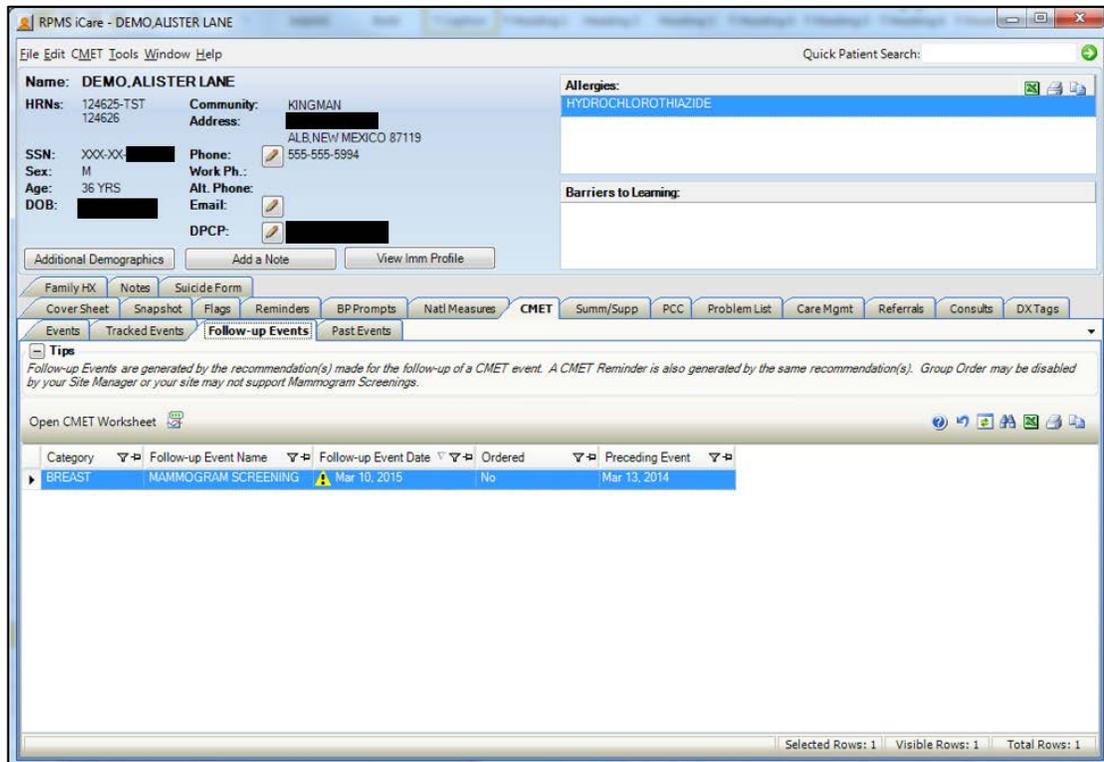


Figure 6-3: CMET Patient View – Follow-up Events sub-tab

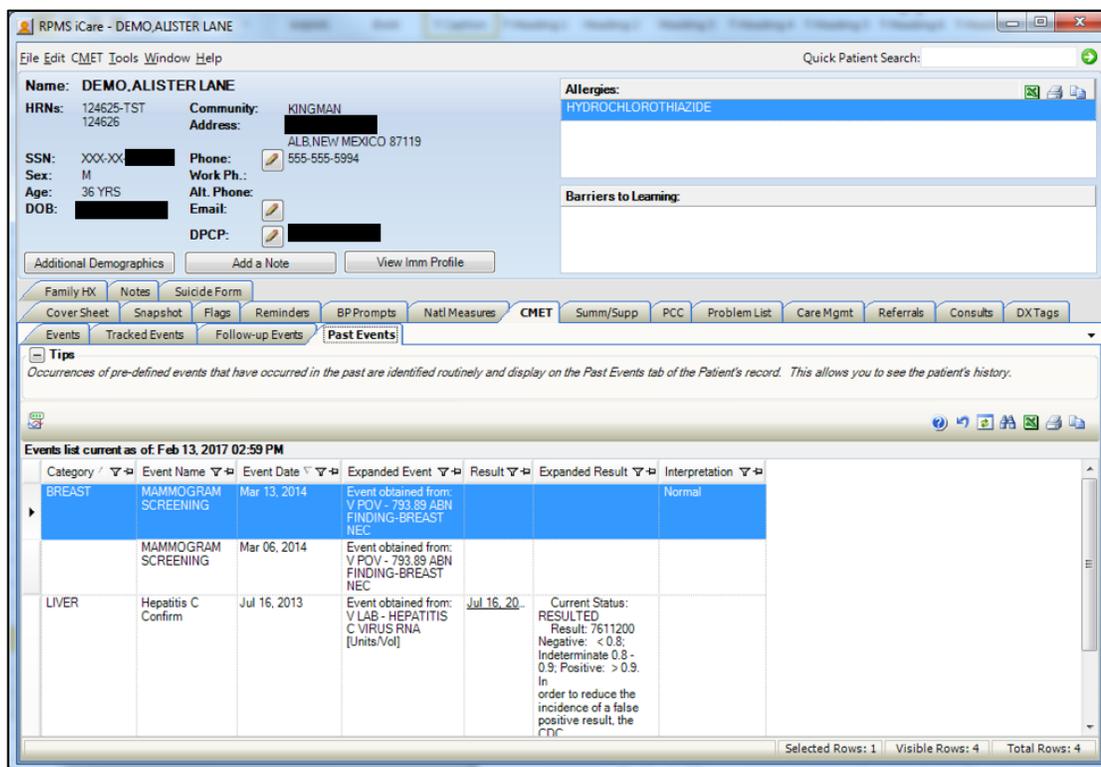


Figure 6-4: CMET Patient View – Past Events sub-tab

Past Events are all the CMET Events that have been data mined for the selected patient. It can be used to review historical information on this patient.

Table 6-1 provides information about the columns on the Past Events sub-tab.

Table 6-1: Past Events sub-tab column names and meanings.

Column Name	Meaning
Category	The name of the category for the follow-up event: Breast, Cervical, Colon, Liver, Skeletal, STI, Prostate.
Event Name	The name of the event. Events are procedures, exams, or tests that have been documented in RPMS. Events are predefined.
Event Date	The date associated with the event.
Result	The date of the result of the event. This cell also has hover help, which identifies where the source of the result such as V Radiology, V Lab, or Women’s Health packages.
Interpretation	The interpretation of the selection in the Result field. There is hover help for this field, e.g., CMET, that refers to where the interpretation was obtained. The interpretation will be from either Women’s Health or from a tracked CMET Event where the Finding has been entered. All CMET Findings have an interpretation.

7.0 Standard Menus on the CMET Tab

7.1 File Menu

The **File** menu has the following options:

CMET: This shows various options depending on the current sub-tab.

Change RPMS Server/Login: This option allows users to change access and verify codes to the iCare application on the **iCare Login** dialog. See section 8.8 for details.

Change RPMS Division: This option allows users to change the RPMS Division on the Select Division dialog. This option applies to a site that uses more than one RPMS database.

Recent Panels: This sub-menu displays recent panels. Select one to view the patients in the selected panel in a new window. The list includes the last five panels viewed.

Page Setup: This option allows users to set Margin, Paper, Layout characteristics (such as landscape or portrait orientation) and which Printer to use. These settings are used when using the Print option.

Print Preview: This option displays the print preview dialog. See Section 8.3 for details.

Print: This option sends the selected rows to the printer using the settings in Page Setup. Note that only the selected tab will be printed.

Background Jobs: This option displays the **Background Jobs** pop-up. This pop-up displays, for example, the start and end dates for the monthly and weekly background jobs.

Exit iCare: This option exits the iCare application. Users are prompted to save any changed panels if necessary.

Lock iCare: This option allows users to lock the iCare application. Resume the application by entering your verify code on the **iCare Locked By** dialog and clicking **Resume**.

7.2 Tools Menu

The options on the **Tools** menu are the same as those on the **Tools** menu for the **Panel List** window.

Quick Patient Search: Search for a patient name. This is the same function as pressing F8 on the keyboard.

The **Mail Merge, Reset View, Search, Refresh, Excel Export, Print, and Copy Rows to Clipboard** options function like the buttons on the right side of the window.

Manage Templates: This option opens the **Template Management** dialog where you manage your templates and public templates. See Section 8.10 for more details.

User Preferences: This option opens the **User Preferences** window. See Section 8.1 for details.

View iCare Notifications: This option opens the **iCare Notifications** pop-up.

iCare Package Manager: This option is active for those users with Package Manager security key. See Section 8.4 for more details.

iCare Site Parameters: This option allows users to set site parameters for Employers, Pregnancy, Inactivity Time Out, CMET Site Parameters, IPC Site Parameters, Divisions, DM Audit. See Section 8.9 for more details.

Taxonomy Maintenance: This option is used by those users who can maintain taxonomies. Also use this option to view the taxonomy elements. This option has the following two features: **View/Edit Taxonomies** (Section 8.5) and **Taxonomy User Access** (Section 8.7).

Web Links: This option provides links to Web sites for related clinical guidelines.

7.3 View Menu

The **View** menu has one option:

Split View: When this option is checked, the current view is the split view. Switch back to the CMET tab by removing the check mark; this is a temporary setting. After exiting and reopening iCare, the settings established in User Preferences (Section 8.1) are used for the default view.

8.0 iCare Features Used by CMET Main Window

The following provides information about using the iCare features for the CMET main window.

8.1 User Preferences

This section focuses on the user preferences for the CMET main window.

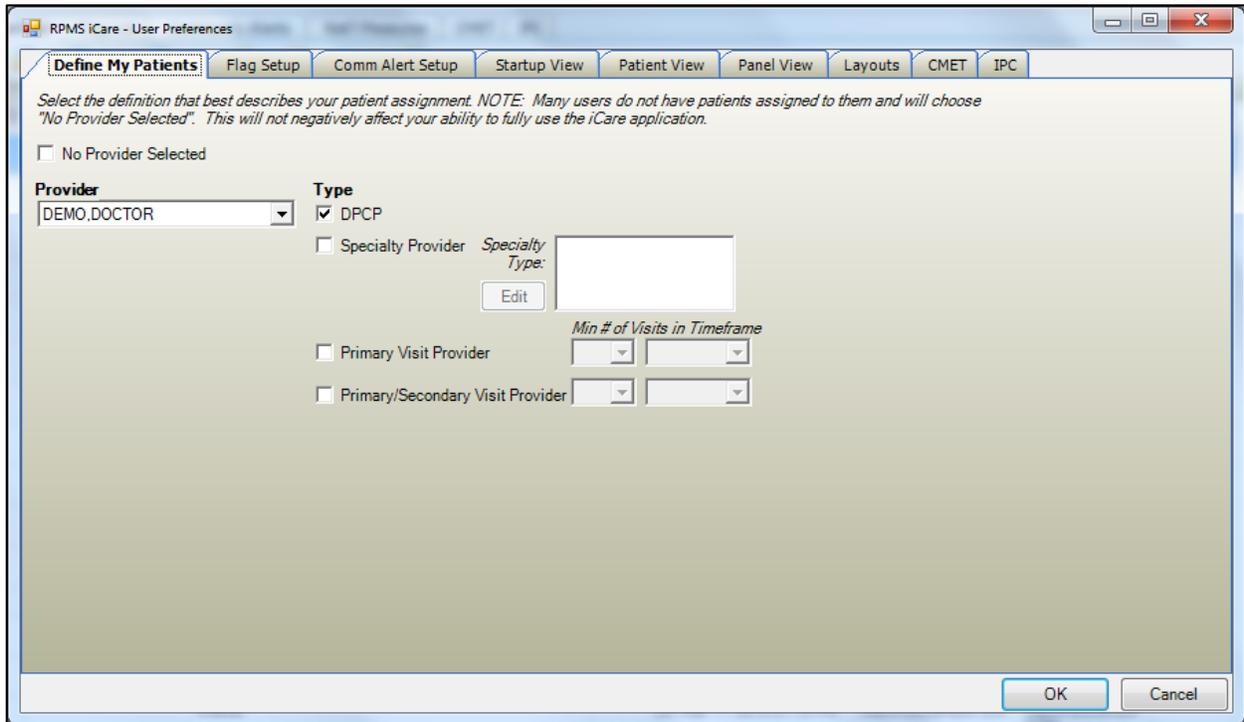


Figure 8-1: **User Preferences** dialog

After the User Preferences window is complete, click **OK** and the user preferences will be in effect for the operation of the iCare application. Otherwise, click **Cancel**.

8.1.1 Startup View Tab

The selection on **Startup View** tab determines which tab will display when first accessing the iCare application.

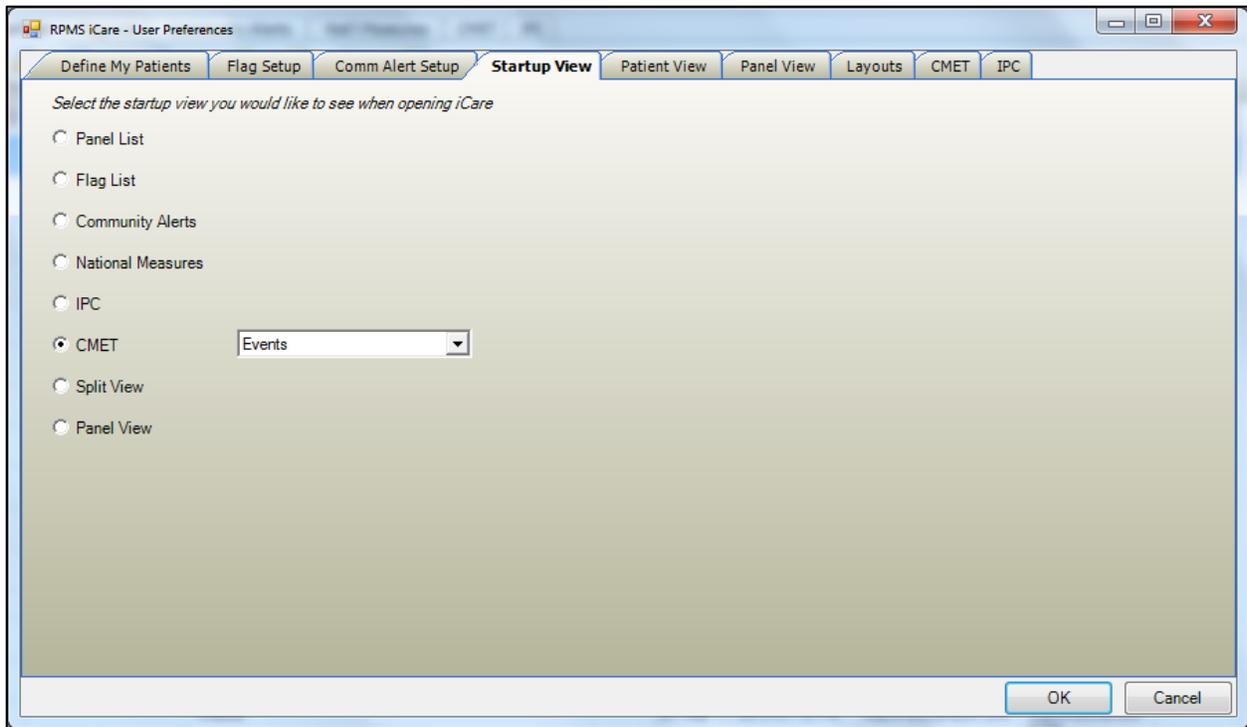


Figure 8-2: **Startup View** tab on **User Preferences** dialog

Select the **CMET** option button to set the CMET main window as the first window to display when accessing the iCare application. In addition, select the sub-tab to display (**Events** is the default). Select an option from the list to change the sub-tab.

8.1.2 Layouts Tab

The **Layouts** tab on **User Preferences** determines the default template used by the various CMET sub-tabs.

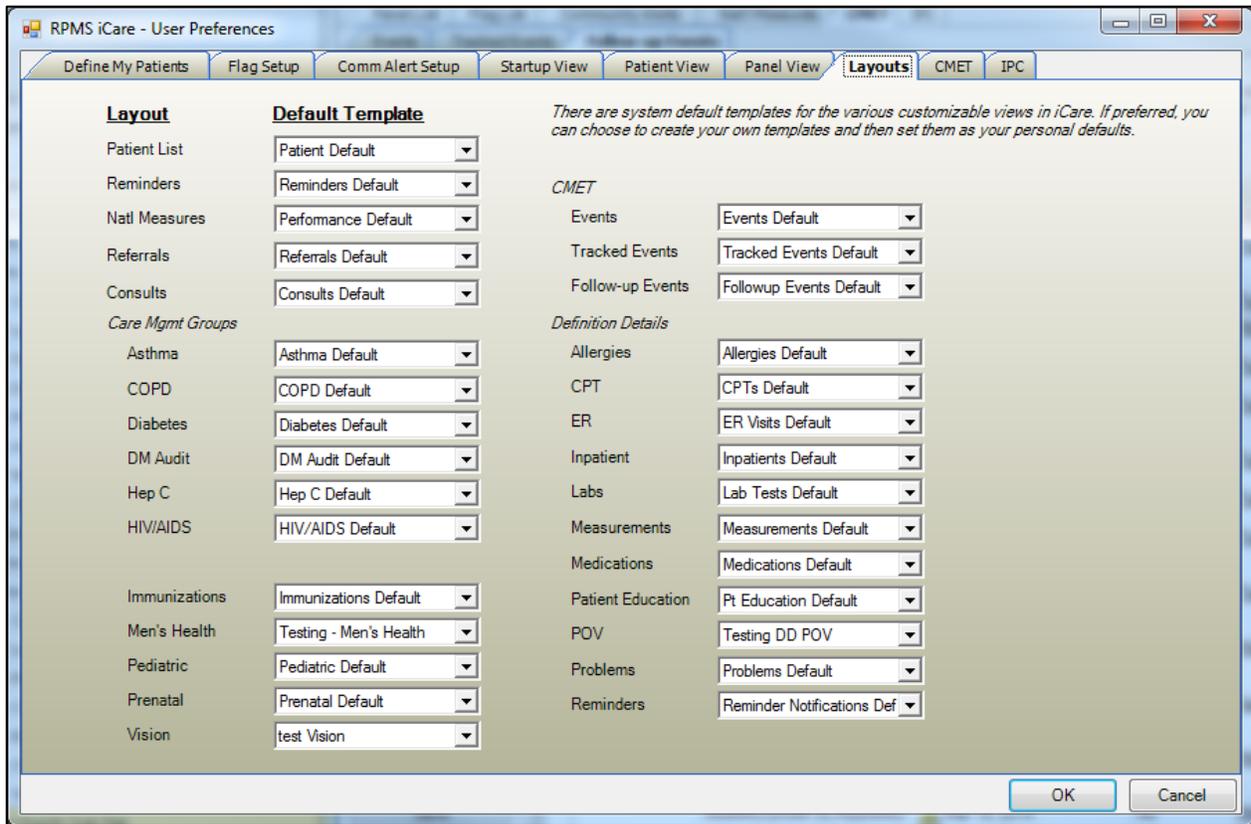


Figure 8-3: **User Preferences** dialog – **Layouts** tab

8.1.3 CMET Tab

The **CMET** tab determines the user preferences for the **Events**, **Tracked Events**, and **Follow-up Events** sub-tabs of the **CMET Main View** tab.

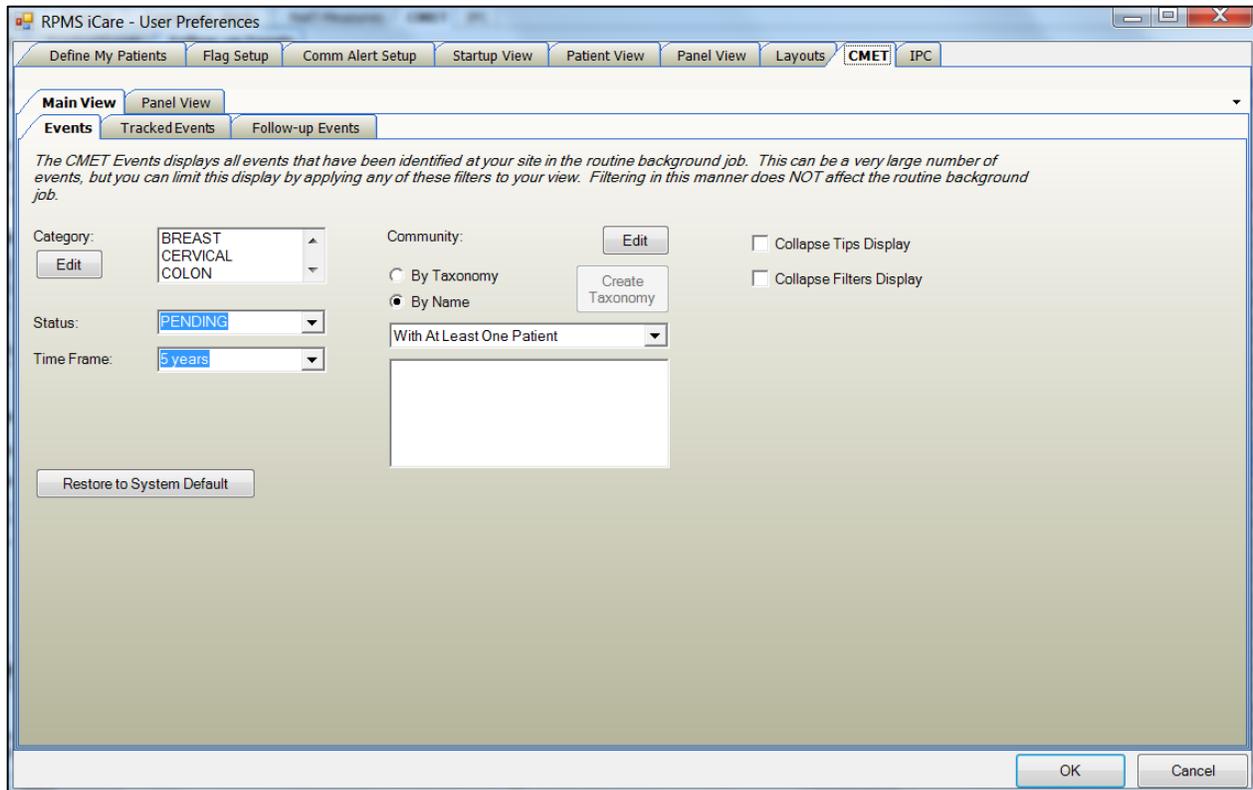


Figure 8-4: **Main View** tab features

After changing the settings on any of the three sub-tabs, click **OK** to save the changes (otherwise, click **Cancel**).

Restore to System Default Button.

Click the **Restore to System Default** button to return to the system default settings. This button is available on all CMET sub-tabs.

Collapse Tips Display

Select the **Collapse Tips Display** check box to collapse the Tips of the particular sub-tab (you will not be able to view the various tips). This check box is available on all of the CMET sub-tabs.

Collapse Filters Display

Select the **Collapse Filters Display** check box to collapse the **Filter** group box of the particular sub-tab (you will not be able to view the various filters). This check box is available on all of the CMET sub-tabs.

Status

Use the **Status** field to filter the displayed events to those with a particular status. Click the list and select an option to populate the **Status** field. The **Status** field is not available on the **Follow-up Events** sub-tab.

Time Frame

Use the **Time Frame** field to filter the displayed events to those in a particular time frame. Click the list and select an option to populate the **Time Frame** field. This field is available on all of the CMET sub-tabs.

8.1.3.1 Events Sub-tab

This information applies to the **Events** sub-tab for the CMET main view.

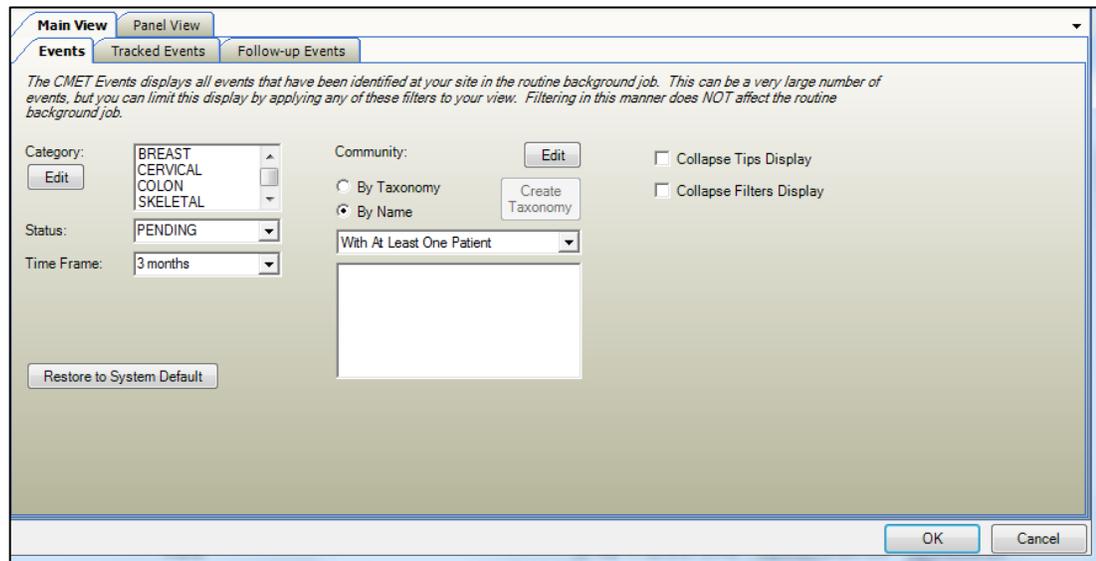


Figure 8-5: **Events** sub-tab options

The **Events** sub-tab displays all events that have been identified at your site in the routine background job. This can be a very large number of events; limit this display by applying filters to the view. Filtering in this manner does *not* affect the routine background job.

Use the **Events** sub-tab to establish the filters for the current events on the CMET main window.

Use the **Tracked Events** sub-tab to establish the filters for the tracked events on the CMET main window.

Use the **Follow-up Events** sub-tab to establish the filters for the follow-up events on the CMET main window.

All three sub-tabs have the same features.

8.1.3.1.1 Category

Use the **Category** field to filter the displayed events to those in one or more categories. To populate the **Category** field, click the **Edit** button to access the **Add/Remove Events Category** dialog. The default **Category** field includes Breast, Cervical, Colon, Liver, Skeletal, STI, and Prostate.

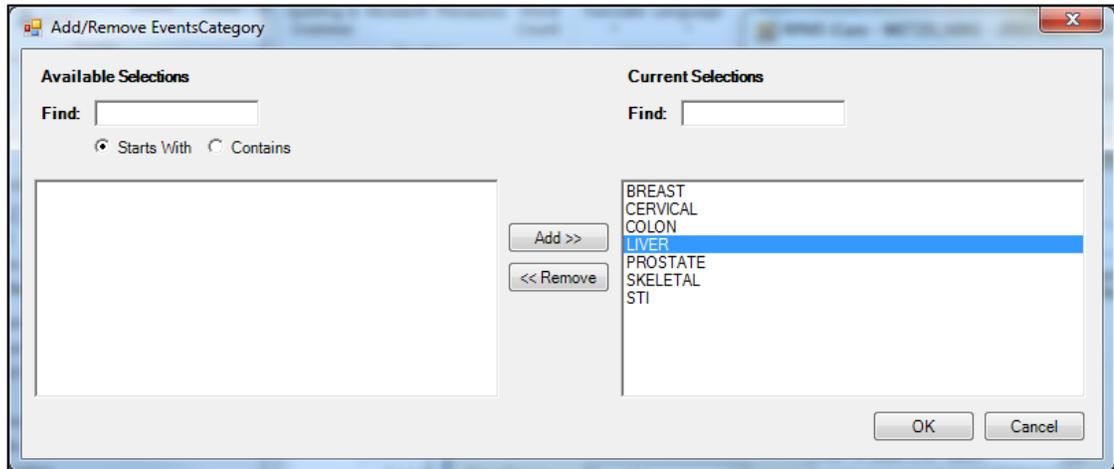


Figure 8-6: **Add/Remove Events Category** dialog

Available Selections

Use the **Find** field to locate a particular event category name by using the two search option buttons: **Starts With** determines what the event category name starts with and **Contains** determines any of the characters in the event category name. These option buttons assist users when the Available Selections list is quite long.

To move a selected category name from the **Available Selections** list to the **Current Selections** list, click **Add**.

Current Selections

Use the **Find** field to locate a particular event category by typing a few characters of the event category name. The application will scroll the list to the first found name.

To move a selected category name from the **Current Selections** list to the **Available Selections** list, click **Remove**.

The options in the **Current Selections** field determines the default Category for the **Events (Tracked Events, Follow-up Events)** sub-tab on the CMET main window.

8.1.3.1.2 Community

Use the **Community** field to filter the displayed events to those in a community either by taxonomy or by name.

Figure 8-7: **Community** filter fields

Select one of the option buttons to use as a filter for the events.

By Name Option Button

Use the **By Name** option button to define the communities to filter the events.

Use the field below the option buttons to filter the communities in the lower field. The options are (1) **With At Least One Patient** or (2) **All**.

Use the **Edit** button to add one or more names to the lower field. Click the **Edit** button to access the **Add/Remove Communities** dialog.

Figure 8-8: **Add/Remove Communities** dialog

Available Selections

The **Available Selections** option determines the patient population for a community by name. Select an option from the list to change this field.

Section 8.1.3.1.1 provides information on how to use the **Available Selections** and **Current Selections** group boxes.

When the **Add/Remove Communities** dialog is complete, click **OK** and this populates the lower field with the names of the communities shown in the **Current Selections** group box. (Otherwise click **Cancel**.)

If the lower field contains more than one community, this activates the **Create Taxonomy** button. To use the **Create Taxonomy** button, the user must have the iCare Editor (BQIZCMED) or iCare Package Manager (BQIZMGR) security key.

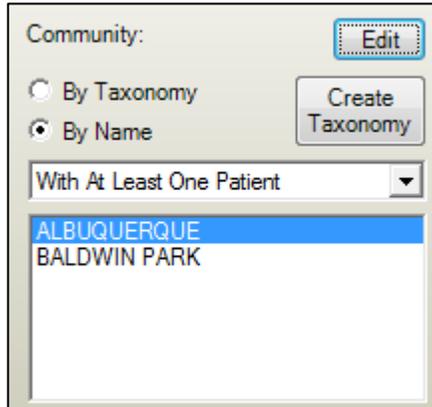


Figure 8-9: **Community** group box with active **Create Taxonomy** button

Use the **Create Taxonomy** button to save the listed communities as a Community taxonomy. Click the **Create Taxonomy** button to display the **Create/Update Community Taxonomy** dialog.

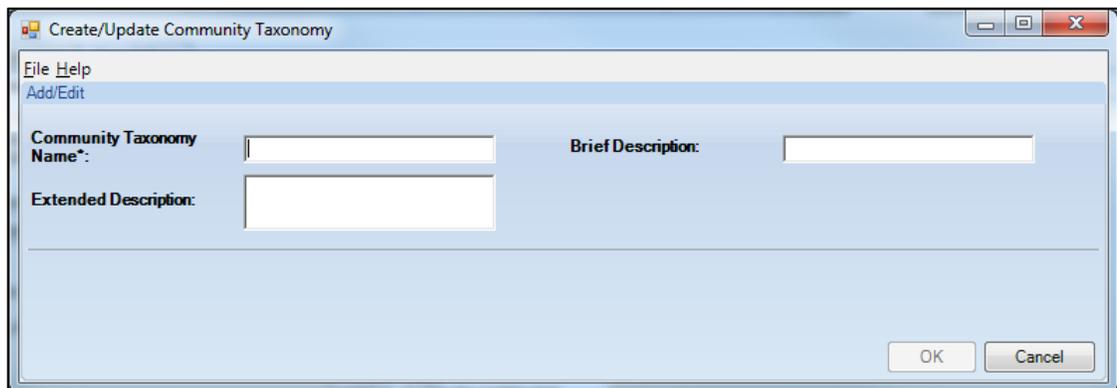


Figure 8-10: **Create/Update Community Taxonomy** dialog

Use the **Community Taxonomy Name** field (required) to specify a taxonomy name for the list of communities. Use the **Brief Description** and **Extended Description** fields (not required) to add other information about the taxonomy. When the dialog is complete, click **OK** (otherwise, click **Cancel**).

If the user enters or uses a duplicate taxonomy name, iCare will display a warning that the user might be overwriting the user's taxonomy. The user can overwrite (**Yes**), save as another name (**No**), or **Cancel** (return to the **Create/Update Community Taxonomy** dialog).

If using a unique taxonomy name, the application displays the **Confirm save to RPMS** information message: "The data will be saved to the RPMS server. Do you want to continue?" Click **Yes** to save the data to the RPMS server (otherwise click **No**).

After the user clicks **Yes**, the application displays the **Community Taxonomy Create** message stating that the community taxonomy was successfully created and that the panel definition will be updated to reflect the use of a taxonomy rather than a list of communities. Click **OK** to dismiss the message. After the user clicks **OK**, the list of names will be replaced with the name of the taxonomy, and the **By Taxonomy** option button will be selected.

By Taxonomy Option Button

Use the **By Taxonomy** option button to define the taxonomies to filter the displayed events. After clicking the **Edit** button, the application displays the **Add/Remove Community Taxonomies** dialog.

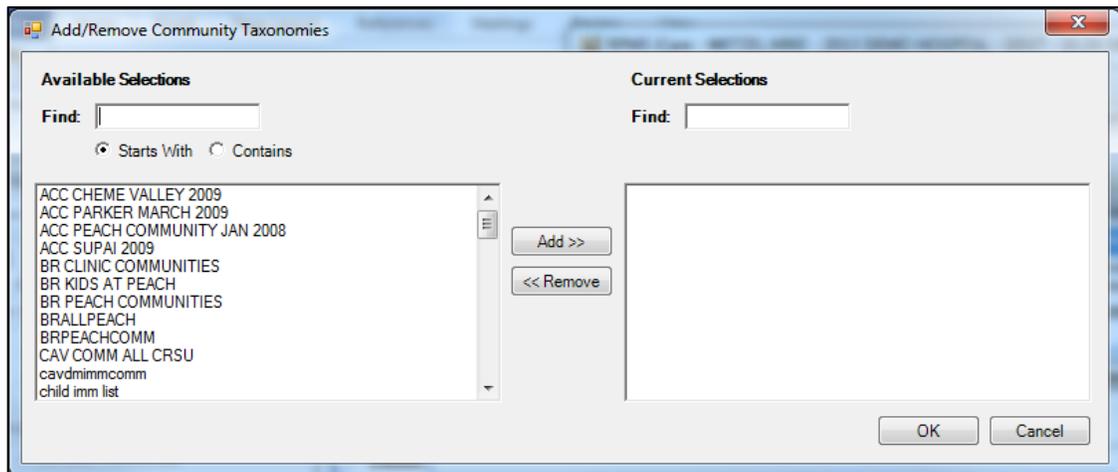


Figure 8-11: **Add/Remove Community Taxonomies** dialog

Section 8.1.3.1.1 provides information on how to use the **Available Selections** and **Current Selections** group boxes.

When the **Add/Remove Community Taxonomies** dialog is complete, click **OK**. The options in the **Current Selections** group box determine the default Community by Taxonomy for the Events on the CMET main window. (Otherwise click **Cancel**.)

8.2 Free Text Fields

Free text fields are fields that users can type information into. This type of field does not have a list from which the user can select an option to populate it.

An example of the Free Text field is the **Panel Name** field (when creating/editing a panel definition).

There is a context menu to aid in editing the text.



Figure 8-12: Context menu to aid in editing text

These options operate just like those in any Windows application.

Undo: Removes the last edit action.

Cut: Removes the selected text from its current position and places it on the Windows clipboard.

Copy: Copies the selected text and places it on the Windows clipboard (the text is not removed).

Paste: Copies the contents of the Windows clipboard and places it in the field at the current cursor position.

Delete: Removes the selected text from its current position.

Select All: Selects all of the text in the current field.

8.3 Print Preview

The **Print Preview** window contains several features for reviewing and printing the current document.

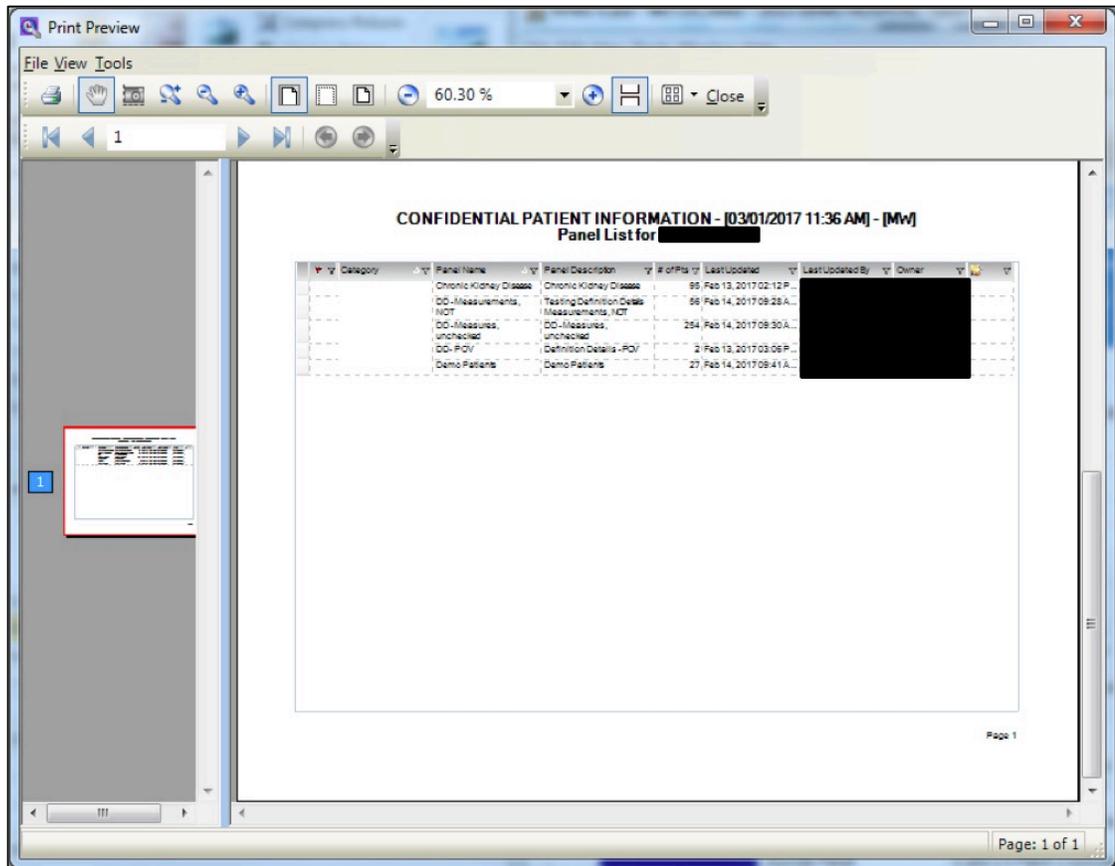


Figure 8-13: **Print Preview** dialog

The **Print Preview** window contains two panels: The left panel displays the pages in the document, and the right panel displays a larger version of the page selected in the left panel.

Table 8-1 provides information on the various buttons on the **Print Preview** window.

Table 8-1: **Print Preview** dialog buttons and descriptions

Button	Description
	Prints the document. This function is also available by selecting Print from the File menu.
	Changes the display of the selected page in the right panel. Navigate the hand tool to change the page selection (red box) in the left panel. This function is also available by selecting Hand Tool from the Tools menu.
	Click for a screen capture of a specified rectangular area. The screen capture copies to the Windows clipboard. Paste the copy into a particular field or another application like Microsoft Word. This function is also available by selecting Snapshot Tools from the Tools menu.

Button	Description
	Specify the zoom magnification. Click the button and move to the area to magnify or minimize. Right-click on the area and select the zoom magnification option from the context menu. This function is also available by selecting Dynamic Zoom Tool from the Tools menu.
	Zooms out and decreases image view size. This function is also available by selecting Zoom Out from the View menu.
	Zooms in and enlarges the image view. This function is also available by selecting Zoom In from the View menu.
	Displays the image in the right panel at its maximum page width (usually enlarges the image). This function is also available by selecting Page Width from the View menu.
	Displays the image in the right panel with page margins hidden. This function is also available by selecting Margin Width from the View menu.
	Displays the page with page margins in the right panel. This function is also available by selecting Whole Page from the View menu.
	Zooms out of image in the right panel. Also available by selecting Zoom Out from the View menu.
	Zooms into image in the right panel. This function is also available by selecting Zoom In from the View menu.
	Displays all pages in the right panel. This function is also available by selecting Continuous from the View menu.
	Click to specify the page layout. This function is also available by selecting Page Setup from the File menu.

Move through the pages in the document by using the arrow buttons on the second line in the toolbar.



Figure 8-14: Document navigation buttons

The same options are available by selecting **View | Go To** (and also on the context menu for the right panel).

Use the **Zoom** field (or select **Zoom** from the **View** menu) to specify the zoom magnification for the right panel by selecting from the list.

Click the **Close** button to close the **Print Preview** dialog or select **File | Exit**.

Select **File | Page Setup** to access the **Page Setup** dialog.

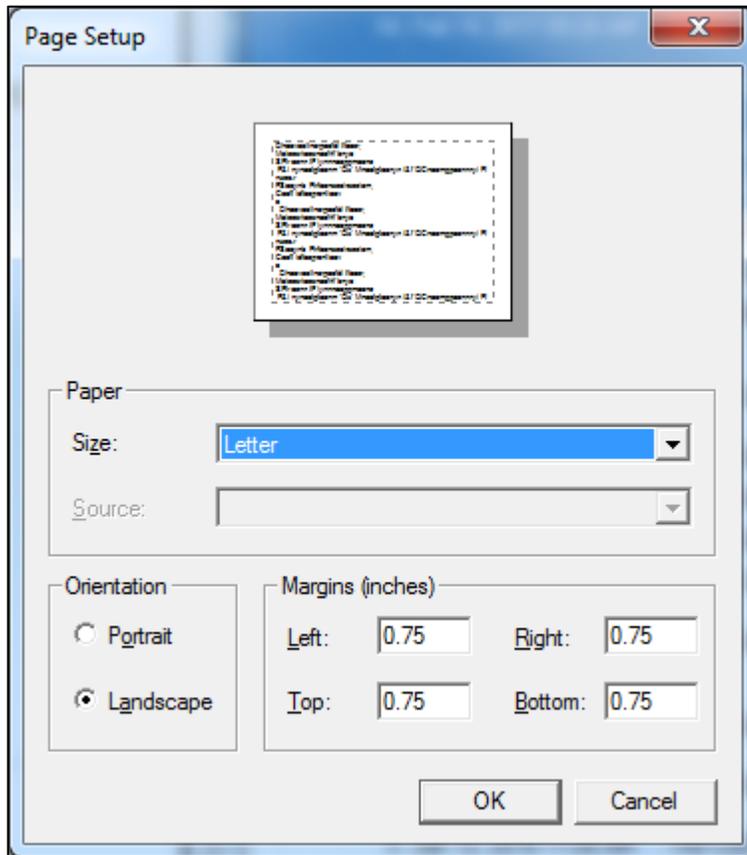


Figure 8-15: **Page Setup** dialog

Specify the paper size and source in the **Paper** group box.

Specify the page orientation in the **Orientation** group box.

Specify the document margins in the **Margins (inches)** group box.

Click **Printer** to access the **Printer** dialog and select the printer to print the document.

After the **Page Setup** dialog is complete, click **OK** to save the page setup options. (Otherwise, click **Cancel**.)

8.4 iCare Package Manager Functions

Users with the **Package Manager** security key can access Manager functions by selecting **Tools | iCare Package Manager** on the iCare main window.



Figure 8-16: **iCare Package Manager** functions

8.4.1 iCare User Access Management

The iCare User Access Management option accesses **iCare User Access Management** dialog.

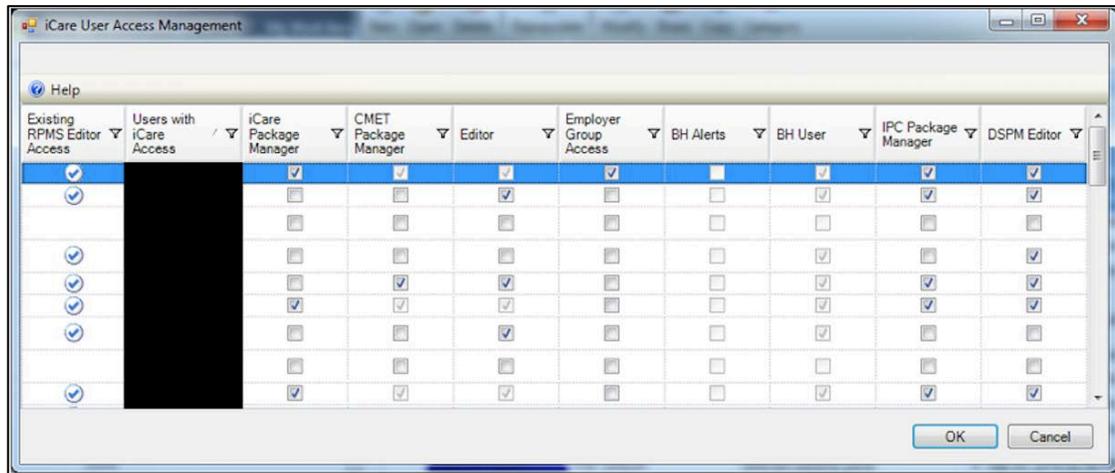


Figure 8-17: **iCare User Access Management** dialog

Users with appropriate permissions can assign roles to a particular user. Scroll to the name on the **iCare User Access Maintenance** dialog and select the appropriate check boxes for the roles. To remove an assigned role, deselect the corresponding check box.

When this dialog is complete, click **OK** to save changes. (Otherwise, click **Cancel**.)

Note: The **BH User** column cannot be changed.

Each column heading has hover help.

Some check boxes are checked, and the background is dark if the user has iCare Package Manager access that supersedes both CMET and Editor permissions. The Employer and Behavioral Health (BH) permissions work differently due to the sensitive nature of the patients involved.

8.4.1.1 Existing RPMS Editor Access

The users displayed on this list (those with the iCare user icon [] in the first column) have Editor or Manager level key(s) to at least one of the following case management applications:

- Case Management System (ACM)
- Diabetes Management System (BDM)
- HIV Management System (BKM)

- Immunization (BI)
- Patient Chart Problem List
- Women's Health (BW)

8.4.1.2 Help Menu

Click the **Help** menu to view the following information:

The users displayed on this list have basic access to the iCare application by the Site (IT) Manager. You cannot give Editor or Package Manager access to iCare to a user who does not have basic access. See your Site Manager to require basic iCare access for other users.

This message applies to the **User with iCare Access** column. Click **OK** to dismiss the message.

8.4.1.3 Users with iCare Access

This column is a list of RPMS users who have been given access to the iCare application by the Site (IT) Manager.

8.4.1.4 iCare Package Manager

The iCare Package Manager has all read/write access as defined for other user levels. This person can do the following:

- Assign all other access roles in iCare: iCare Package Managers; CMET Package Managers, Editors, and Taxonomy Editors.
- Access Patient Information associated with Community Alerts.
- Has all read/write access as defined for other user levels.
- Reassign existing iCare panels to iCare users.

Note: Taxonomy Editor Access Management is assigned through the **Taxonomy Maintenance/ Taxonomy User Access** window from the **Tools** menu.

The iCare Package Manager has the highest level of permissions; hence, the iCare Package Manager will have access to all items accessible by the CMET Package Manager.

The iCare Package Manager does everything an editor does and also has the ability to access the list of patients who have triggered the Community Alerts. This person also assigns Editor access to other users. In addition, this person can assign the CMET Package Manager role.

8.4.1.5 CMET Package Manager

The CMET Package Manager has the ability to establish the CMET site parameters related to Tickler Timeframes and Batch Processing. CMET Package Managers have all read/write access as defined for other user levels.

8.4.1.6 Editors

Editors in iCare have read/write access to:

- PCC Historical Data Entry
- Care Management data
- Family History and Reproductive Factors (Snapshot)
- Designated Specialty Provider Management system (DSPM)
- Problem List
- CMET Worksheet

The Editor role grants permission to edit the care management function (e.g., **HMS Care Management**) and allows **Historical Data** entry.

8.4.1.7 Employer Group Access

Employer Group Access gives the user the ability to define a panel based on the **Employer** option in Panel Definition. They will also have visibility for the **Employee Health** option on the **Panel View: Care Mgmt** tab. Both the definition and **Care Mgmt** feature will not be visible to users who do not have permission.

8.4.1.8 BH Alerts

Exclude non-BH alerts.

8.4.1.9 BH User

User with existing BH access. This cannot be edited from iCare screens.

8.4.1.10 IPC Package Manager

The IPC Package Manager has the ability to establish site parameters related to the background job and microsystem definition for IPC tabs in iCare.

8.4.1.11 DSPM Editor

The DSPM (Designated Specialty Provider Management) Editor gives a user permission to use **Update DPCP** () on panels.

8.4.2 Reassign Panels

The **Reassign Panels** option displays the **Reassign Panels** dialog.

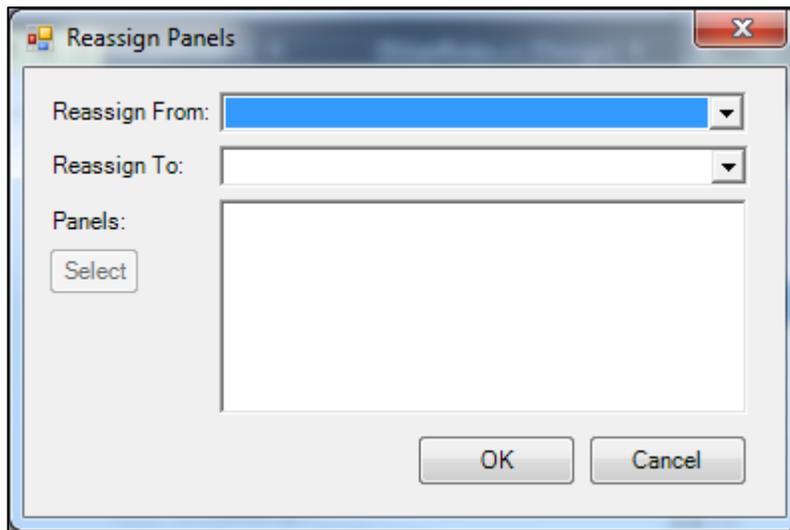


Figure 8-18: **Reassign Panels** dialog

This dialog allows the iCare Package Manager to reassign panels from one user to another user.

Reassign From: Select the user from whom the panels are to be reassigned from the list.

Reassign To: Select the user to whom the panels are to be reassigned from the list.

Populating the first two fields activates the **Select** button. Click **Select** to access the **Add/Remove Panels** dialog.

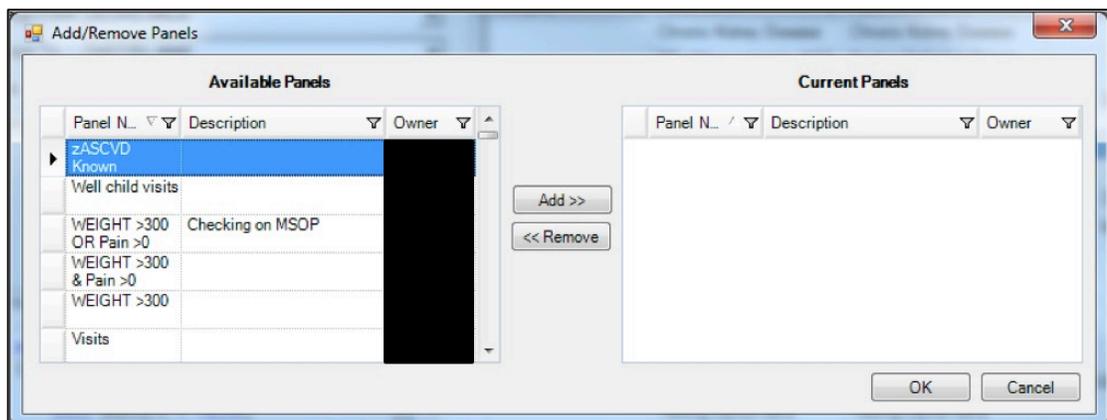


Figure 8-19: **Add/Remove Panels** dialog

After the **Add/Remove** dialog is complete, click **OK**. The panels listed in the **Current Panels** group box will populate the **Panels** field on the **Reassign** dialog. (Otherwise, click **Cancel**).

After the **Reassign Panels** dialog is complete, click **OK**, and the reassigned panels of the **Reassign From** user are removed from that person's panel view. The reassigned panels will appear in the **Reassign To** user panel view. (Otherwise, click **Cancel**.)

8.5 iCare Taxonomy View/Edit

The iCare Taxonomy Editor holds the security key (BQIZTXED), which allows that user to read/edit iCare taxonomies.

Access the **iCare Taxonomy View/Edit** dialog by selecting **Tools | Taxonomy Maintenance | View/Edit Taxonomy Entries** on the main iCare **Tools** menu.

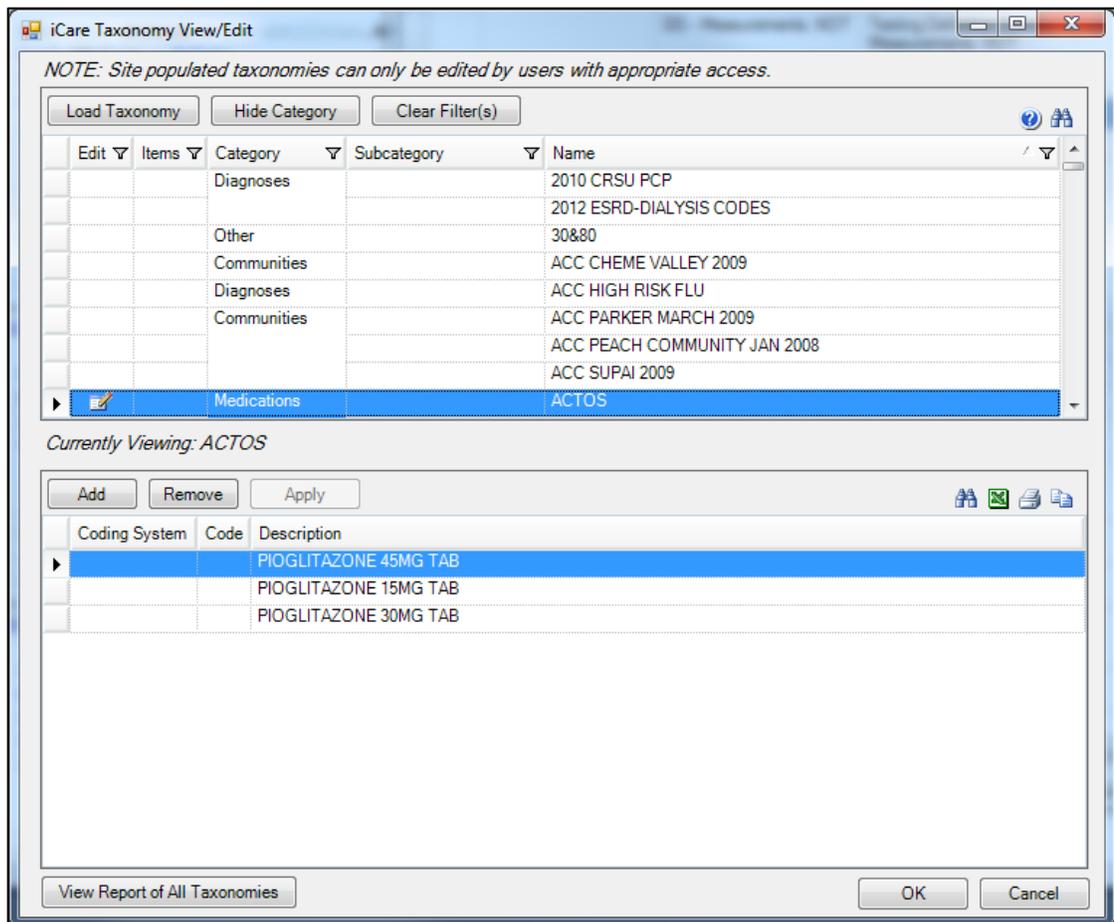


Figure 8-20: iCare Taxonomy View/Edit dialog

Note: Only users with the appropriate security key can view the information on the dialog. The following information message displays: “You do not currently have access rights to edit taxonomies.” Users requiring access need to have the iCare Taxonomy Editor security key (BQIZTXED) added to their RPMS user account.

When first accessing this view/edit dialog, all parts of the tree structure will be collapsed. Expand the tree parts to find the desired taxonomy.

In general, select the taxonomy from the list in the left group box. This causes the **Add** and **Remove** buttons to display in the right group box of the dialog.

Please note that not all taxonomies can be edited. iCare will display a message on the view/edit dialog for these taxonomies. Site-populated taxonomies can only be edited by users with appropriate access.

Use the **Apply** button when adding more than one taxonomy value to the **iCare Taxonomy View/Edit** dialog.

8.5.1 Add Taxonomy Values

Click the **Add** button to create values for a selected item in the left group box. The application displays the **Select Taxonomy Item** dialog.

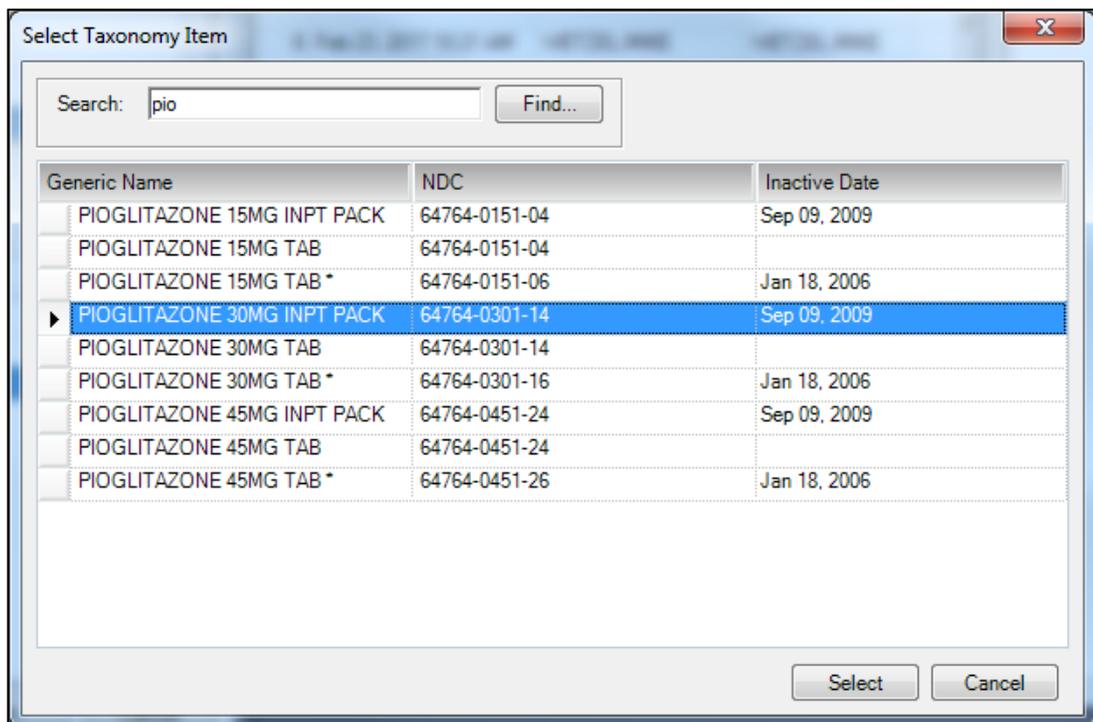


Figure 8-21: **Select Taxonomy Item** dialog

Use the **Search** field to search for a taxonomy item. Highlight the item to add and click **Select**. The application checks for an existing record.

- If the item already exists, a warning message displays. Click **OK** to dismiss the message and return to the **iCare Taxonomy View/Edit** dialog.
- If the item does not exist in the system, it appends the selected item to the bottom of the list.

If there are no more taxonomy values to add, click **Apply** to save changes. Attempting to move to another taxonomy or another part of the iCare application before clicking **Apply** will result in the **Taxonomy changes?** information message displaying. The message will ask whether to apply the changes. Click **Yes** to apply the changes (otherwise, click **No**).

If needed, repeat adding items to various taxonomies. When finished using the **iCare Taxonomy View/Edit** dialog, click **OK** to save (otherwise, click **Cancel**).

8.5.2 Remove Taxonomy Values

To remove one or more items from the list, highlight the item(s) and click **Remove**. The **Confirm taxonomy item remove message** displays. Click **Yes** to remove the items (otherwise, click **No**) and remain on the **iCare Taxonomy View/Edit** dialog.

8.5.3 View Report of All Taxonomies Button

Click the **View Report of All Taxonomies** button to display the **Taxonomy Report** pop-up.

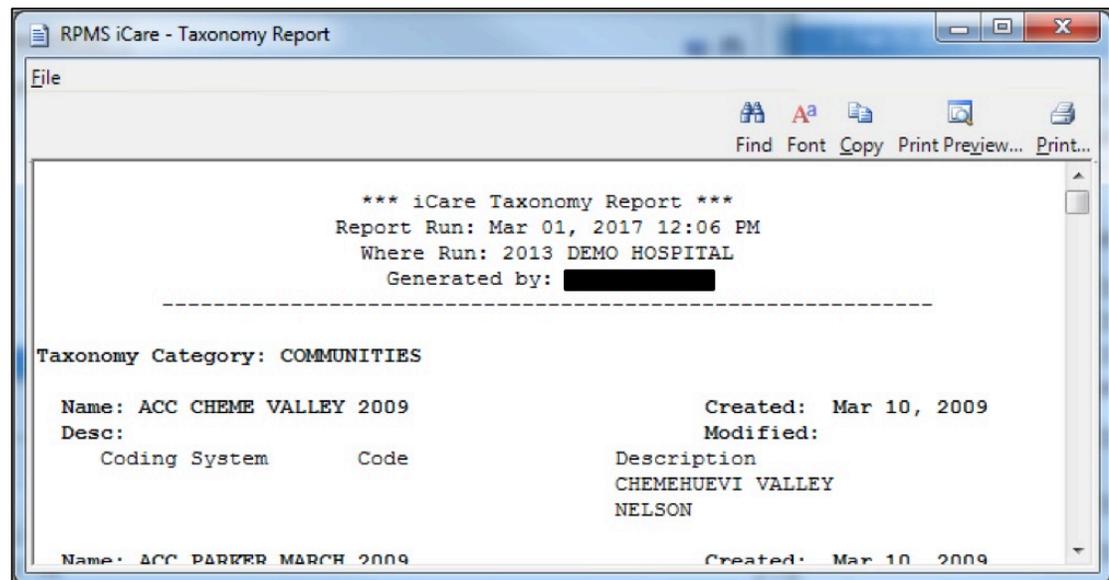


Figure 8-22: Taxonomy Report pop-up

This pop-up provides information about various Taxonomy Categories (listed in alphabetical order).

See Section 8.6 for information about the **File** menu and buttons on the pop-up.

8.6 Pop-up Functionality

Several functions in iCare result in displaying a pop-up. For example, double-clicking on any row in the **Recent Visits** group box on the **Cover Sheet** of the **Patient Record** window results in viewing a pop-up.

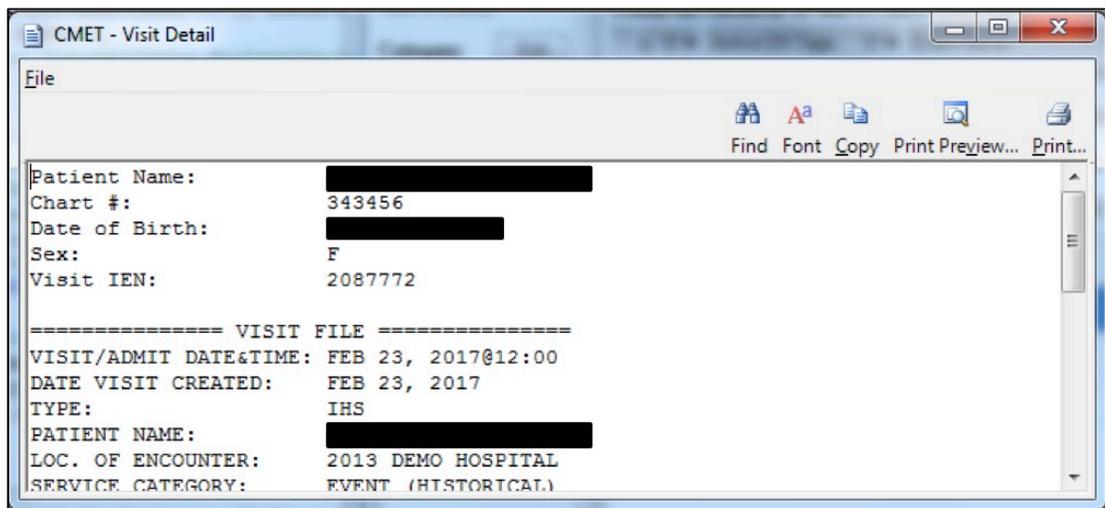
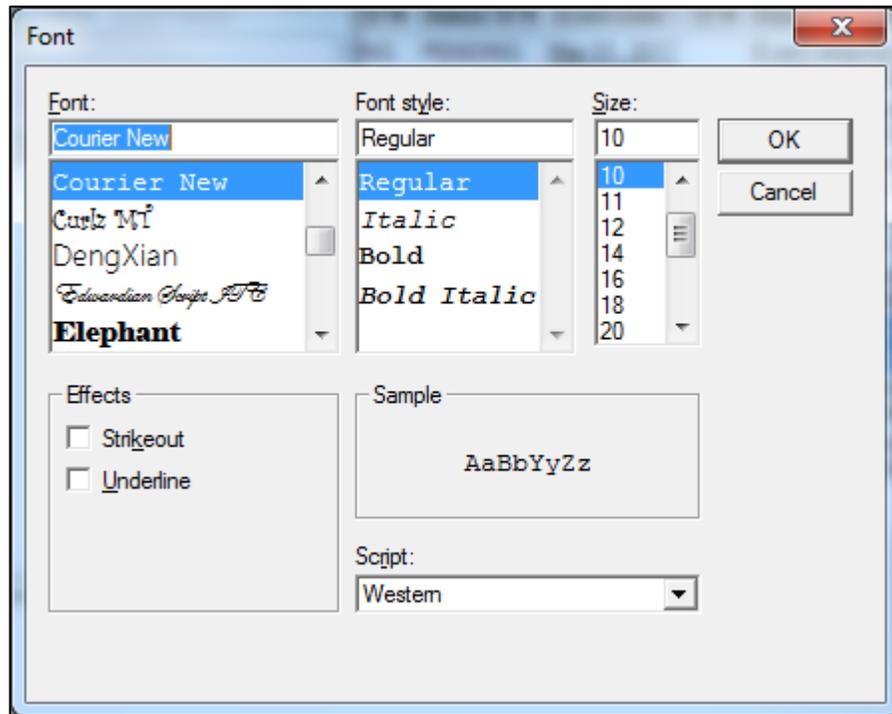


Figure 8-23: **Visit Detail** pop-up

Take the following actions on this pop-up:

- Navigate through the information by using the scroll bar.
- Click the **Find** () button to access a search tool to find data in the current window. This button works like the **Search** button.
- Click the **Font** () button to display the **Font** dialog.

Figure 8-24: **Font** dialog

Use this dialog to change the Font name, style, and size (applies to all of the text). Additional effects like **Strikeout** and **Underline** are also available in this form and perform like those effects in Microsoft Word.

Change the **Script** option to see the text displayed in another language, if that language pack is installed on the computer. If the language pack is not installed, the display will not change by selecting another script.

Click **OK** to apply changes to the text in the current pop-up. These changes are only effective for the current view of the pop-up. (Otherwise, click **Cancel**.)

- Click the **Copy** () button to copy the selected text to the Windows clipboard.
- Click the **Print Preview** () button to view the **Print Preview** dialog (see Section 8.3 for details). Print the pop-up contents from this dialog.
- Click the **Print** () button to display a print dialog to specify the printer, the page range, and number of copies.

The **File** menu contains the print actions (like the **Print Preview** and **Print** buttons), the **Page Setup** function, the **Find** and **Copy** functions, as well as a **Close** function, which dismisses the pop-up.

8.7 Taxonomy User Access

Editing site-populated taxonomies can affect many existing processes in RPMS. For this reason, **Taxonomy Edit** access is carefully assigned to a limited number of users and only after discussion with the CRS (GPRA) coordinator.

Select **Tools | Taxonomy Maintenance | Taxonomy User Access** to access the **iCare Taxonomy User Access Management** dialog.

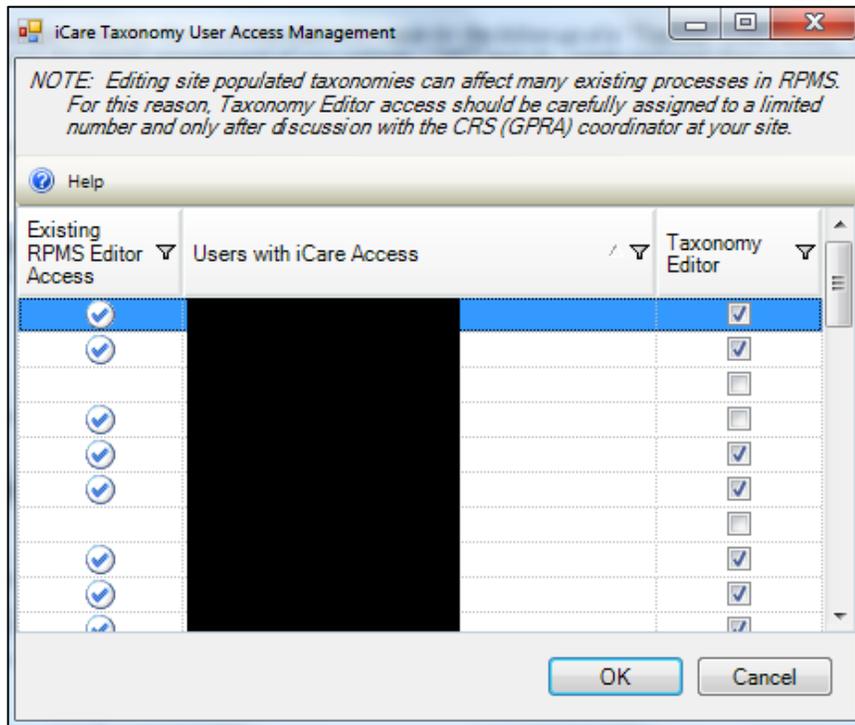


Figure 8-25: **iCare Taxonomy User Access Management** for Taxonomy Editor

Each of the column headings has hover help.

8.7.1 Existing RPMS Editor Access

The users with the iCare user icon (👤) in first column are RPMS users with existing Manager level keys to at least one of the following applications: CRS (BGP), Diabetes Management (BDM), HIV Management System (BKM), and/or Women's Health (BW).

8.7.2 Users with iCare Access

This column is a list of RPMS users who have been given access to the iCare application by the Site (IT) Manager.

8.7.3 Taxonomy Editor

Users with a check mark in the **Taxonomy Editor** column are taxonomy editors who can add and delete members from any Site Populated Taxonomies related to either laboratory tests or medications.

8.7.4 Help Menu

The following information displays after clicking the **Help** menu:

The users displayed on this list have been given basic access to the iCare application by your Site (IT) Manager. You cannot give Editor or Package Manager access to iCare to a user who doesn't have basic access. See your Site Manager to acquire basic iCare access for other users.

8.8 Change RPMS Server/Login

The **Change RPMS Server/Login** option displays on the **File** menu. Select this option to access the **iCare Login** dialog.

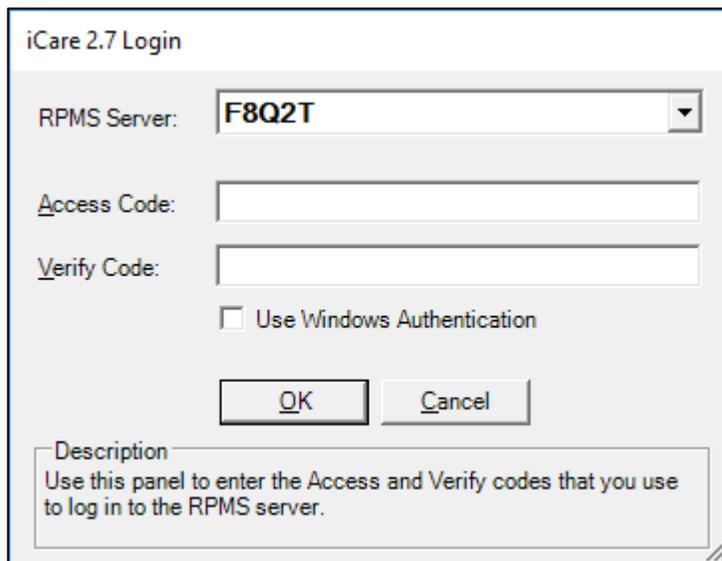


Figure 8-26: **iCare Login** dialog

RPMS Server

Click the list to access the **RPMS Server Management** dialog that displays a list of possible connections.

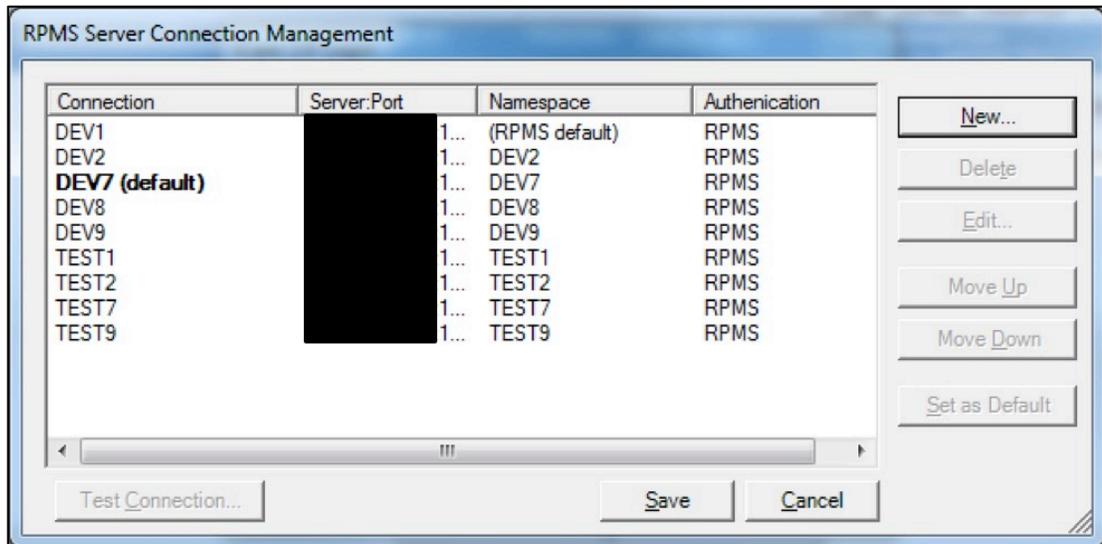


Figure 8-27: **RPMS Server Connection Management** dialog

Select an option on the grid. To create a new connection, click the **New** button, which opens the **Edit RPMS Server Connection** dialog.

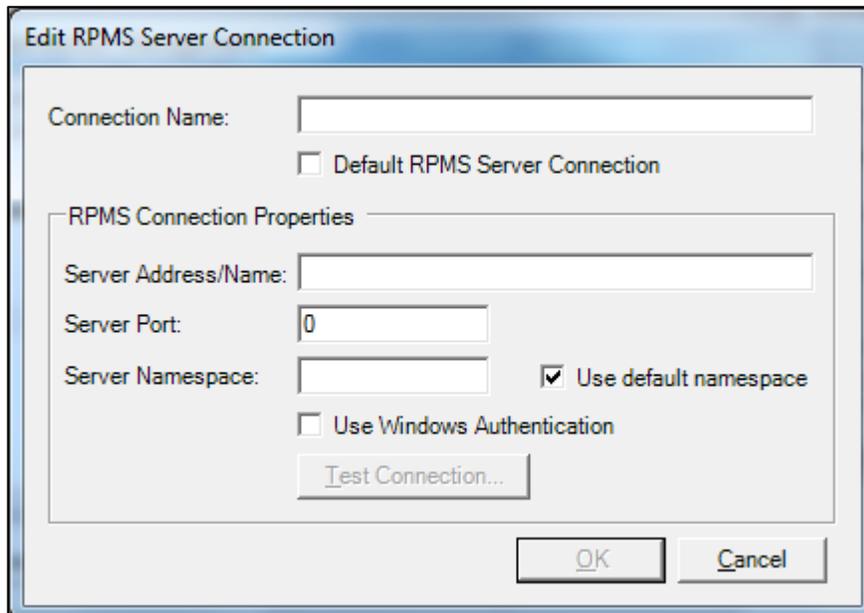


Figure 8-28: **Edit RPMS Server Connection** dialog

Do not select the **Default RPMS Server Connection** or **Use Windows Authentication** check boxes.

Connection Name

Type the name of the connection in this field. This is the name that will appear on the **RPMS Server Connection Management** dialog.

Server Address/Name

Type the number, including punctuation, of the server's IP address. An IP address is typically four groups of two or three numbers, separated by a period (.), e.g., 999.999.99.999. The Site Manager will provide this information.

Server Port

Type the number of the server port. The Site Manager will provide this information.

Server Namespace

If the user's site has multiple databases on one server, the user will also need to type the namespace, which is typically a text string, e.g., DEVEH.

Use default namespace

Select this check box to use the Server Namespace as the default.

After completing the fields, the **Test Connection** button becomes active. Click this button to access the **Test Login** dialog. Populate the **Access Code** and **Verify Code** fields and click **OK**.

- After clicking **OK**, if the connection is correct, the application displays the Connection Test message: "RPMS login was successful." Click **OK** to dismiss the message.
- Otherwise, the application will display an error message; click **OK** to return to the **Test Login** dialog.

After the **Edit RPMS Server Connection** dialog is complete, click **OK** to have the server connection display on the **RPMS Server Connection Management** dialog. Otherwise, click **Cancel**.

After the **RPMS Server Connection Management** dialog is complete, click **Save** (otherwise, click **Cancel**).

After clicking **Save**, the application displays the login dialog to the application.

8.9 iCare Site Parameter Options

Access the **iCare Site Parameters** on the **Tools** menu.

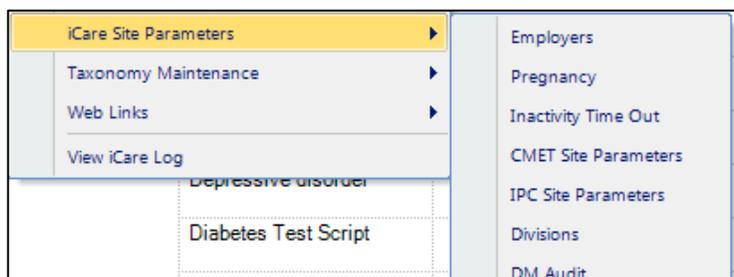


Figure 8-29: iCare Site Parameters menu options

8.9.1 CMET Site Parameters

Use the **CMET Site Parameters** option to determine the **Tickler Timeframes** and **Batch Processing** for CMET. Select the **CMET Site Parameters** option to access the **RPMS iCare – CMET Site Parameters** dialog.

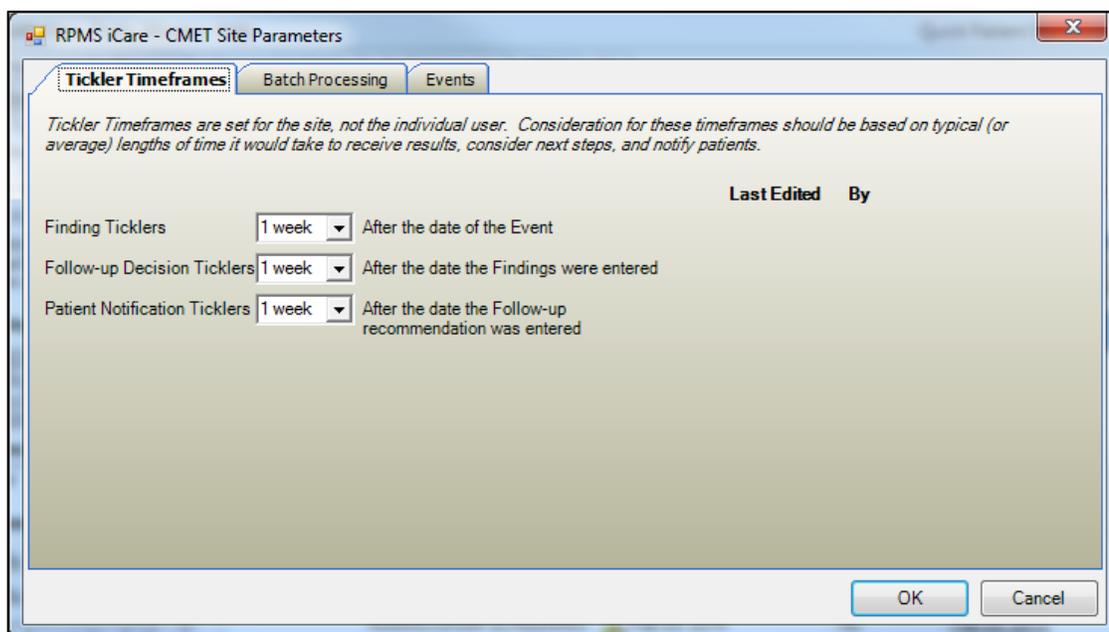


Figure 8-30: RPMS iCare – CMET Site Parameters dialog

Tickler Timeframes

The **Tickler Timeframes** tab sets the Ticklers (reminder notices) for **Findings**, **Follow-up Decision**, and **Patient Notification**.

Each field has a list from which to select an option. When a time frame date is passed, and the step has not been entered, the Tickler will display.

After changing one or more settings and clicking **OK**, the application populates the **Last Edited** field with the date and the **By** field with the person who changed the **Tickler Timeframe** data. (Otherwise, click **Cancel**.)

The application provides Ticklers designed to remind the user that a CMET is tracked and requires attention. There are three types of Ticklers:

- **Finding Ticklers** are based on the event date. The Tickler is initiated from the date of the event.
- **Follow-up Decision Ticklers** are initiated from the date the Findings are entered.
- **Patient Notification Ticklers** are initiated from the date the Follow-up recommendation is entered.

Time frames for each of the three steps is based on the preceding step. For example, a Follow-up Decision Tickler is based on the date the Finding is entered.

Batch Processing Tab

The **Batch Processing** tab sets the time frame and notification type for the Pap Smear and Mammogram Screening events with normal results. In addition, the type of **Normal Finding for the Mammogram Screening** event is set on this tab.

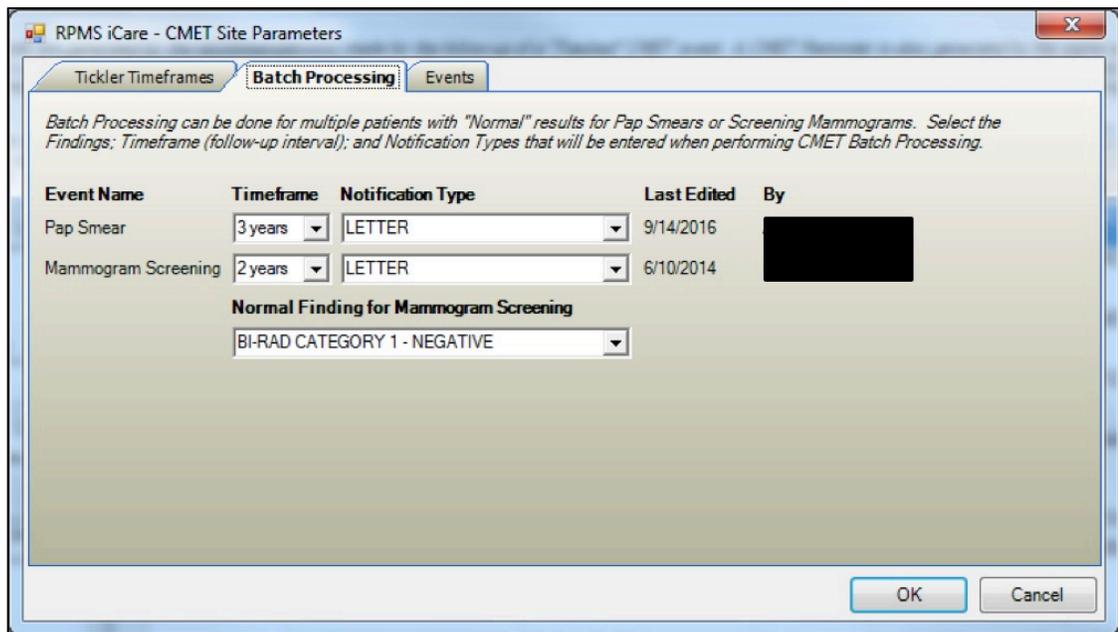


Figure 8-31: **Batch Processing** tab

The **Notification Type** field defines how the patient will be notified about the Pap Smear or Mammogram Screening, for example, by telephone. The default is **Letter**.

The **Timeframe** consideration is based on typical (or average) length of time it would take to receive results, to consider the next steps, and to notify the patient.

The option selected for the **Normal Finding for Mammogram Screening** field determine what is a normal finding.

Each field has a list from which to select an option.

After the user changes one or more settings and clicks **OK**, the application populates the **Last Edited** field with the date and the **By** field with the person who changed the batch processing data. (Otherwise, click **Cancel**.)

Events

The **Events** tab allows users to edit a manual event default value.

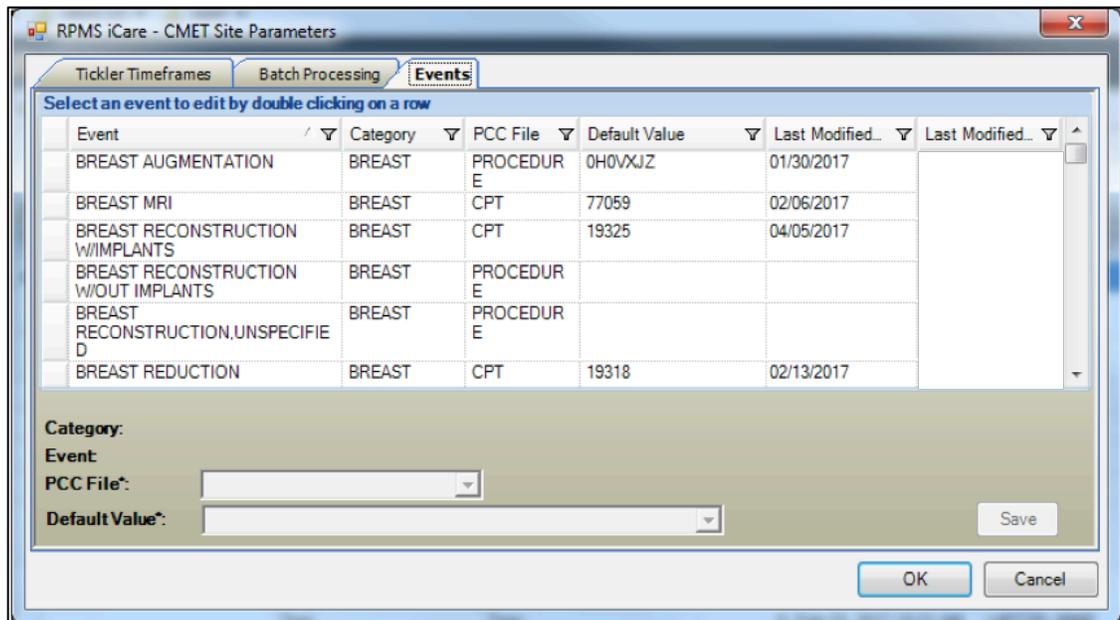


Figure 8-32: **Events** tab

Double-click on an event in the grid to populate the bottom of the form. Select the **PCC File** value and then the **Default Value** for the event. Click the **Save** button.

8.10 Manage Templates

The **Manage Templates** option provides a means for defining multiple template layouts. Templates can also be created and added so that anyone can download and use them.

The **Manage Templates** option appears on the **Tools** menu. Select it to access the **Template Management** dialog.

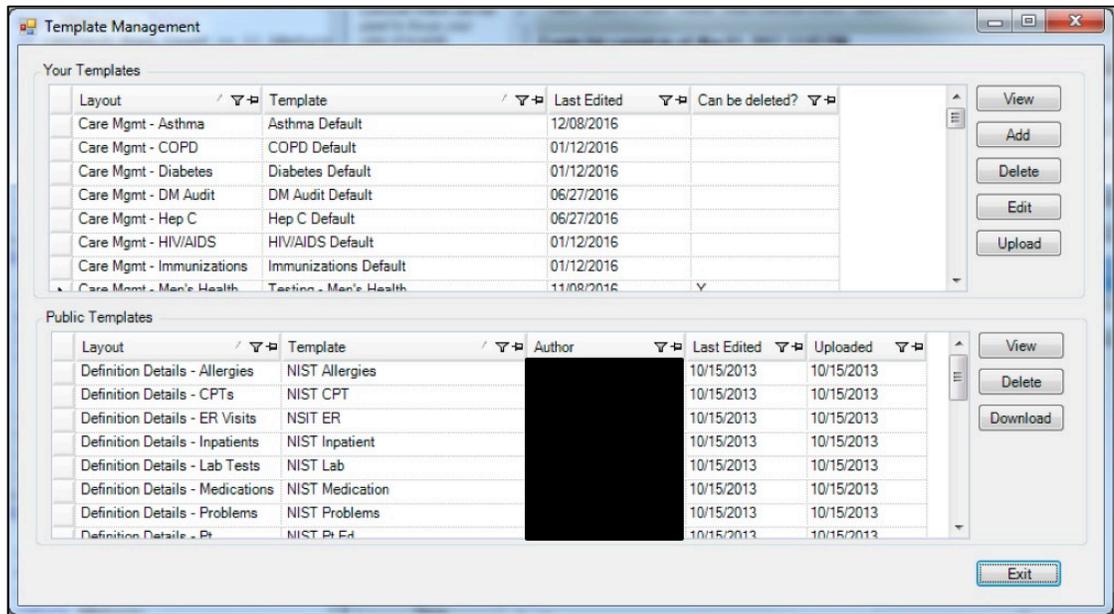


Figure 8-33: **Template Management** dialog

The **Your Templates** group box contains a list of all of a specific user's defined templates and the layout contained in each template.

The **Public Templates** group box contains a list of all templates at the site that are available to be downloaded to the list in **Your Templates**.

8.10.1 View

Use the **View** action to view a selected template. This is a view-only display.

8.10.2 Upload

The **Upload** action is available in the **Your Template** group box. Select a template to upload and then click **Upload**. The selected template will appear in the **Public Templates** group box. The author will be you (the person who executed the Upload).

8.10.3 Download

The Download action is available in the **Public Templates** group box. Select a record to download and click **Download**. The selected template will display in the **Your Templates** group box. In the **Template** field, your name (the person who executed the download) will display after the name of the template.

8.10.4 Delete

The **Delete** action is available in the **Your Templates** and **Public Templates** group boxes and applies to your templates only. Select a record to delete and click **Delete**. The **Delete Template** information message displays confirming the deletion. Click **Yes** to delete (otherwise, click **No**.)

8.10.5 Edit

The **Edit** action is available in the **Your Templates** group box. Select a template to edit and click **Edit**. Access the columns for the selected template. Section 8.10.6.1 provides information about how to use this feature.

8.10.6 Add

The **Add** action is available in the **Your Templates** group box. Click **Add** to access the **Add Template** dialog.

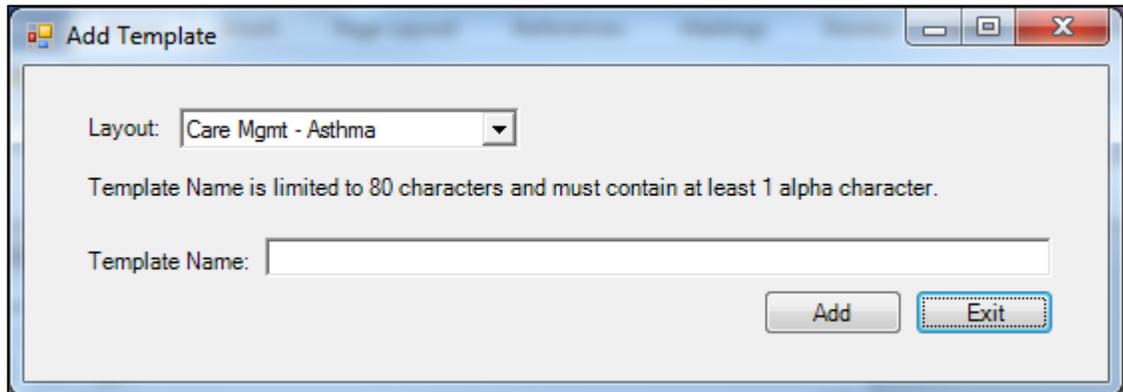


Figure 8-34: **Add Template** dialog

Layout: Select an option from the **Layout** list to specify which layout to use for the new template.

Template Name: Type the name of the template in this Free Text field, which is limited to 80 characters and must contain at least one alpha character.

After the dialog is complete, click **Add** to access the template to define the columns and column sort for the new template. (Otherwise, click **Exit**.)

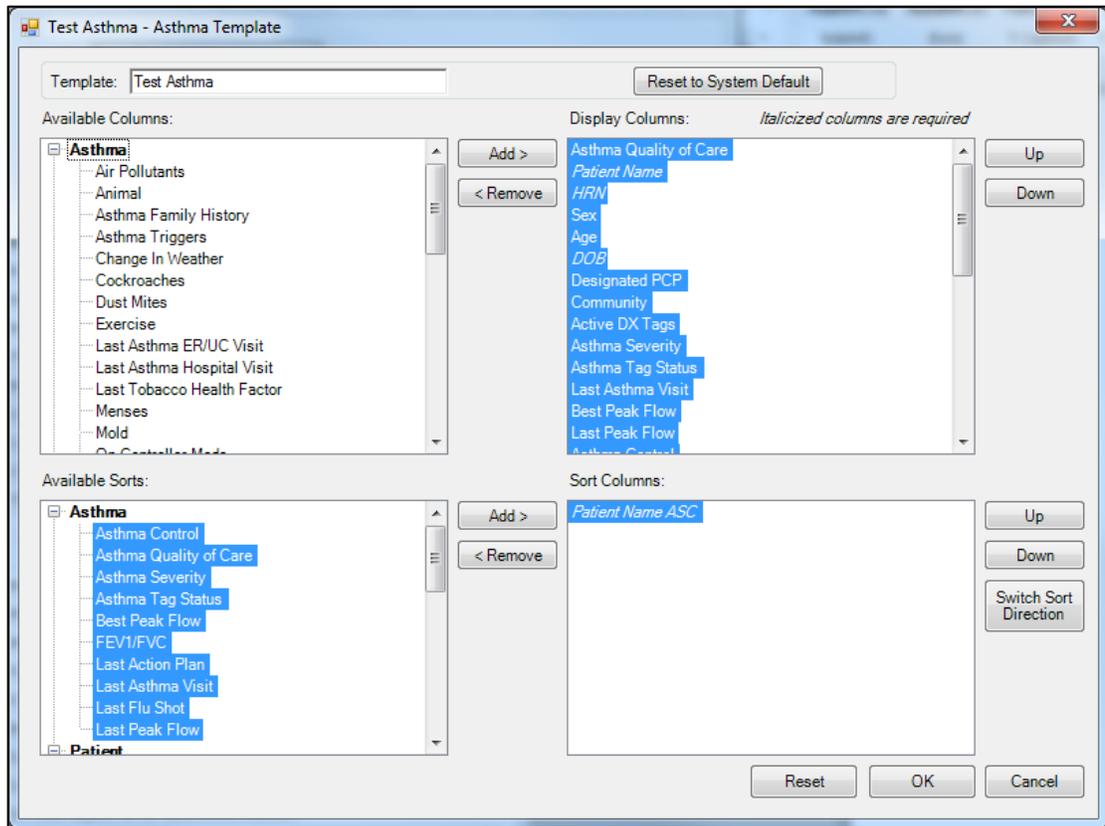


Figure 8-35: New template created

Click the **Reset to System Default** button to reset the template to the system default.

To discard changes, click **Reset**.

After the template window is complete, click **OK** and the new template will appear in the **Your Templates** group box. (Otherwise, click **Cancel**.)

8.10.6.1 Display and Available Columns

Use the **Display Columns** to determine which columns to display for the particular window or tab.

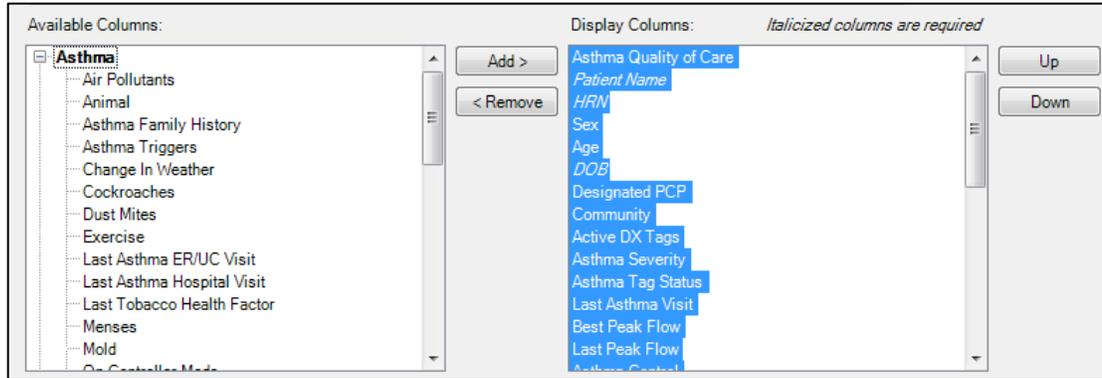


Figure 8-36: **Available** and **Display** columns

The listing in the **Display Columns** area shows the columns that will be displayed for your template. The column names in italics are required and cannot be removed.

To move a highlighted column name in the **Available Columns** area to the list in the **Display Columns** area, click **Add**. This moves the column name from the left panel to right panel.

Likewise, remove a highlighted column name in the **Display Columns** area and move it to the **Available Columns** area by clicking **Remove**. This moves the column name from the right panel to the left panel.

Note: Column names in italics are required and cannot be removed.

Determine the order the columns display in the **Display Columns** area by using the **Up** and **Down** buttons. Highlight a column name and click the appropriate button. Moving an item to the desired location may involve clicking the button more than once.

8.10.6.2 Columns to Sort

Sorting a column arranges the column items in alphanumeric order.

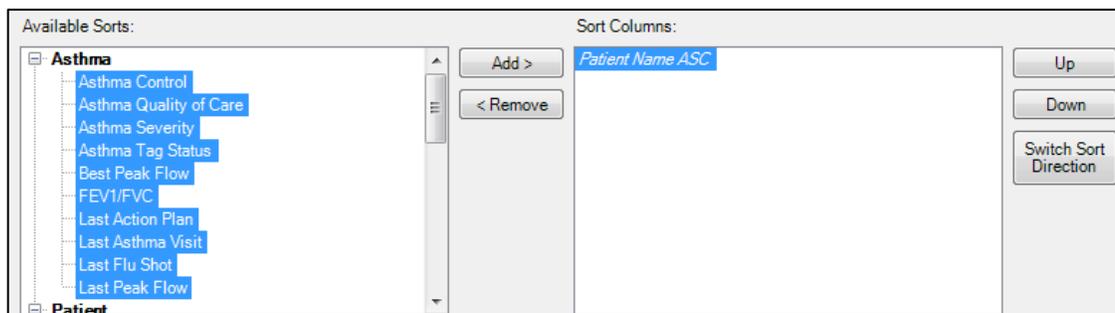


Figure 8-37: **Available Sorts** and **Sort Columns** area

To move a selected column name from the **Available Sorts** area to the list in the **Sort Columns** area, click **Add**. This moves the column name from the left panel to right panel.

Likewise, remove a selected column from the **Sort Columns** area and move it to the **Available Sorts** area by clicking **Remove**. This moves the column name from the right panel to the left panel.

<p>Note: Column names in italics are required and cannot be removed.</p>

8.10.6.3 Column Sort Order

Use the **Sort Columns** area to determine which columns to sort for the particular window or tab.

Determine the order in which the columns are sorted in the **Sort Columns** area by using the **Up** and **Down** buttons. Select a column name and click the appropriate button. It may require clicking the button more than once to move an item to the desired location. For example, if **Gender**, **Patient Name**, and **Diagnosis Tags** are in the right column, the **Gender** sort is applied first, then the **Patient Name**, and the **Diagnosis Tags** sort is applied last.

8.10.6.4 Switch Sort Direction

The names of columns in the **Sort Columns** area display “ASC” appended to the name, for example, **Patient Name ASC**. Switch the sort order for a selected column by clicking the **Switch Sort Direction** button. In the example, the name changes to **Patient Name DESC**. Use the **Switch Sort Direction** action on more than one column.

Appendix A: Care Management Events

A.1 BREAST

A.1.1 BREAST AUGMENTATION

BTPW BRST AUG PROC ICD Procedure

A.1.2 BREAST MRI

BTPW BRST MRI CPTS CPT Procedure

BTPW BRST MRI PROC ICD Procedure

A.1.3 BREAST RECONSTRUCTION W/IMPLANTS

BTPW BRST RECON W/ IMP CPTS CPT Procedure

BTPW BRST RECON W/IMP PROCS ICD Procedure

BTPW BRST RECON W/IMP DXS POV

A.1.4 BREAST RECONSTRUCTION W/OUT IMPLANTS

BTPW BRST RECON W/O IMP CPTS CPT Procedure

BTPW BRST RECON W/O IMP PROC ICD Procedure

A.1.5 BREAST RECONSTRUCTION,UNSPECIFIED

BTPW BRST RECON UNS PROC ICD Procedure

A.1.6 BREAST REDUCTION

BTPW BRST REDUC CPTS CPT Procedure

BTPW BRST REDUC PROC ICD Procedure

A.1.7 BREAST ULTRASOUND

BTPW BRST ULTRA-SND CPTS CPT Procedure

BTPW BRST ULTRA-SND PROC ICD Procedure

A.1.8 CENTRAL DUCT EXCISION

BTPW CENTRAL DUC EXC CPTS CPT Procedure

A.1.9	CLINICAL BREAST EXAM	
	BTPW CLIN BRST EXAM PROC	ICD Procedure
	BTPW CLIN BRST EXAM DXS	POV
	BTPW CLIN BRST EXAM CPTS	CPT Procedure
A.1.10	DUCTOGRAM	
	BTPW DUCTOGRAM CPTS	CPT Procedure
	BTPW DUCTOGRAM PROC	ICD Procedure
A.1.11	FINE NEEDLE ASPIRATION	
	BTPW FINE NEEDLE ASP CPTS	CPT Procedure
	BTPW FINE NEEDLE ASP PROC	ICD Procedure
A.1.12	LUMPECTOMY	
	BTPW LUMPECTOMY CPTS	CPT Procedure
	BTPW LUMPECTOMY PROC	ICD Procedure
A.1.13	MAMMOGRAM DX BILATERAL	
	BTPW MAMMOGRAM BI DX CPTS	CPT Procedure
A.1.14	MAMMOGRAM DX UNILATERAL	
	BTPW MAMMOGRAM UNI DX CPTS	CPT Procedure
A.1.15	MAMMOGRAM SCREENING	
	BTPW MAMMOGRAM SCREEN CPTS	CPT Procedure
	BGP MAMMOGRAM ICDS	POV
A.1.16	MAMMOGRAM,UNSPECIFIED	
	BGP MAMMOGRAM PROCEDURES	ICD Procedure
A.1.17	MASTECTOMY,BILATERAL (W/BI MOD .50)	
	BTPW BI MASTECTOMY CPTS	CPT Procedure
	BGP MASTECTOMY PROCEDURES	ICD Procedure

A.1.18	MASTECTOMY,UNILATERAL	
	BTPW UNI MASTECTOMY CPTS	CPT Procedure
	BGP UNI MASTECTOMY PROCEDURES	ICD Procedure
A.1.19	MASTECTOMY,UNSPECIFIED	
	BTPW MASTECTOMY UNS CPTS	CPT Procedure
A.1.20	NEEDLE BIOPSY	
	BTPW NEEDLE BX CPTS	CPT Procedure
	BTPW NEEDLE BX PROC	ICD Procedure
A.1.21	NEEDLE BIOPSY,GUIDED	
	BTPW NEEDLE BX GUIDED CPTS	CPT Procedure
A.1.22	NODE DISSECTION,AXILLARY	
	BTPW AX NODE DISECT CPTS	CPT Procedure
	BTPW AX NODE DISECT PROC	ICD Procedure
A.1.23	NODE DISSECTION,SENTINEL	
	BTPW SENT NODE DISECT CPTS	CPT Procedure
	BTPW SENT NODE DISECT PROC	ICD Procedure
A.1.24	OPEN BIOPSY	
	BTPW OPEN BREAST BX CPTS	CPT Procedure
	BTPW OPEN BREAST BX PROC	ICD Procedure
A.1.25	STEREOTACTIC BIOPSY	
	BTPW STEREO BX CPTS	CPT Procedure
A.2	CERVICAL	
A.2.1	COLPOSCOPY IMPRESSION	
	BTPW COLP IMP NO BX CPTS	CPT Procedure
	BTPW COLP IMP NO BX PROC	ICD Procedure

A.2.2	COLPOSCOPY W/ BIOPSY	
	BTPW COLP WITH BX CPTS	CPT Procedure
	BTPW COLP WITH BX PROC	ICD Procedure
A.2.3	CONE BIOPSY	
	BTPW CONE BX CPTS	CPT Procedure
	BTPW CONE BX PROC	ICD Procedure
A.2.4	CRYOTHERAPY	
	BTPW CRYOTHERAPY CPTS	CPT Procedure
	BTPW CRYOTHERAPY PROC	ICD Procedure
A.2.5	DILATION AND CURETTAGE	
	BTPW D&C CPTS	CPT Procedure
	BTPW D&C PROC	ICD Procedure
A.2.6	ENDOCERVICAL CURETTAGE	
	BTPW ENDOCERVICAL CURR CPTS	CPT Procedure
	BTPW ENDOCERVICAL CURR PROC	ICD Procedure
A.2.7	ENDOMETRIAL BIOPSY	
	BTPW ENDOMETRIAL BX CPTS	CPT Procedure
	BTPW ENDOMETRIAL BX PROC	ICD Procedure
A.2.8	HPV - DNA SCREEN	
	BTPW HPV DNA SCREEN CPTS	CPT Procedure
	BTPW HPV DNA SCREEN DXS	POV
	BTPW HPV DNA SCREEN LOINC	LAB (LOINC)
	BTPW HPV DNA SCREEN TAX	LAB
A.2.9	HYSTERECTOMY	
	BGP HYSTERECTOMY CPTS	CPT Procedure
	BGP HYSTERECTOMY PROCEDURES	ICD Procedure

A.2.10 LASER ABLATION

BTPW LASER ABLATION CPTS	CPT Procedure
BTPW LASER ABLATION PROC	ICD Procedure

A.2.11 LASER CONE

BTPW LASER CONE CPTS	CPT Procedure
BTPW LASER CONE PROC	ICD Procedure

A.2.12 LEEP

BTPW LEEP CPTS	CPT Procedure
BTPW LEEP PROC	ICD Procedure

A.2.13 PAP SMEAR

BGP CPT PAP	CPT Procedure
BQI PAP PROCEDURES	ICD Procedure
BGP PAP LOINC CODES	LAB (LOINC)
BGP PAP SMEAR TAX	LAB

A.2.14 PELVIC EXAM

BTPW PELVIC EXAM CPTS	CPT Procedure
BTPW PELVIC EXAM PROC	ICD Procedure
BTPW PELVIC EXAM DXS	POV

A.2.15 PELVIC ULTRASOUND

BTPW PELVIC U/S CPTS	CPT Procedure
BTPW PELVIC U/S PROC	ICD Procedure

A.2.16 PERIANAL BIOPSY

BTPW PERIANAL BX CPTS	CPT Procedure
BTPW PERIANAL BX PROC	ICD Procedure

A.2.17 VAGINAL ULTRASOUND

BTPW VAGINAL U/S CPTS	CPT Procedure
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A.3 COLON

A.3.1 COLONOSCOPY

BTPW COLONOSCOPY CPTS	CPT Procedure
BGP COLO PROCS	ICD Procedure

A.3.2 DOUBLE CONTRAST BARIUM ENEMA

BGP BE CPTS	CPT Procedure
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A.3.3 FECAL OCCULT BLOOD TEST (FOBT)

BGP FOBT CPTS	CPT Procedure
BGP FOBT LOINC CODES	LAB (LOINC)
BGP GPRA FOB TESTS	LAB

A.3.4 FLEXIBLE SIGMOIDOSCOPY

BTPW SIGMOID CPTS	CPT Procedure
BGP SIG PROCS	ICD Procedure

A.4 LIVER

A.4.1 Hepatitis C Confirm

BQI HEP C CONFIRM LOINC CODES	LAB (LOINC)
BQI HEP C CONFIRM TESTS	LAB

A.4.2 Hepatitis C Genotype

BQI HEP C GENOTYPE LOINC	LAB (LOINC)
BQI HEP C GENOTYPE TESTS	LAB

A.4.3 Hepatitis C Screen

BQI HEP C SCREEN LOINC CODES	LAB (LOINC)
BQI HEP C SCREEN TESTS	LAB

A.5 SKELETAL

- A.5.1 OSTEOPOROSIS SCREENING - DXA CENTRAL**
 BTPW DXA CENTRAL CPTS CPT Procedure
- A.5.2 OSTEOPOROSIS SCREENING - GENERAL**
 BTPW OSTEO SCREEN PROC ICD Procedure
 BTPW OSTEO SCREEN DXS POV
- A.5.3 OSTEOPOROSIS SCREENING - PERIPHERAL DXA**
 BTPW PERIPH DXA CPTS CPT Procedure
- A.5.4 OSTEOPOROSIS SCREENING - QUANTITATIVE CT**
 BTPW QUAN CT CPTS CPT Procedure
- A.5.5 OSTEOPOROSIS SCREENING - QUANTITATIVE
 ULTRASOUND**
 BTPW QUAN U/S CPTS CPT Procedure
- A.6 STI**
- A.6.1 CHLAMYDIA SCREEN**
 BTPW CHLAMYDIA CPTS CPT Procedure
 BQI CHLAMYDIA SCREEN DXS POV
 BGP CHLAMYDIA LOINC CODES LAB (LOINC)
 BGP CHLAMYDIA TESTS TAX LAB
- A.6.2 GONORRHEA SCREEN**
 BKM GONORRHEA TESTS CPTS CPT Procedure
 BKM GONORRHEA LOINC CODES LAB (LOINC)
 BKM GONORRHEA TEST TAX LAB
- A.7 PROSTATE**
- A.7.1 Prostate Screen**
 BQI PROSTATE SCRN CPTS CPT Procedure

	BQI PSA LOINC CODES	LAB (LOINC)
	BQI PSA TEST	LAB
A.7.2	Prostate Biopsy	
	BQI PROSTATE BIOPSY CPTS	CPT Procedure
A.7.3	Prostate Ultrasound	
	BQI PROSTATE ULTRASOUND CPTS	CPT Procedure

Glossary

Context Menu

The menu of options that displays when right-clicking on an entity.

Designated Primary Care Provider

In RPMS, the provider name that is assigned as the primary care physician for a patient or group of patients at a specific facility. This is not a required function.

Free Text Field

A field where the user can type text, just like typing a note to someone.

iCare Package Manager

The designated person with authority to manage all information settings for iCare.

Providers

Any staff member in an I/T/U facility who provides direct healthcare to patients, e.g. general practice or specialty physicians, registered nurses, social workers, physician assistants, etc.

Taxonomy

In RPMS, a grouping of functionally related data elements, such as ICD codes, that are created and maintained within the RPMS Taxonomy Setup application. Taxonomies will be used as definitions for diagnoses, procedures, lab tests, medications, and other clinical data types.

To change or add to an existing taxonomy, please see a CRS coordinator.

Tooltip/Hover Help

A common GUI element used to provide additional information to users. To display a Tooltip, hover the mouse pointer, without clicking, over a column heading or field.

Acronym List

Acronym	Term Meaning
BH	Behavioral Health
CMET	Care Management Event Tracking
CPT	Current Procedural Terminology
CQM	Clinical Quality Measures
CRS	Clinical Reporting System
DOB	Date of Birth
DPCP	Designated Primary Care Provider
DSPM	Designated Specialty Provider Management
GUI	Graphical User Interface
HHS	Health and Human Services
HRN	Health Record Number
ICD	International Classification of Diseases
IHS	Indian Health Service
IPC	Improving Patient Care
I/T/U	Indian, Tribal, and Urban
LOINC	Logical Observation Identifiers Names and Codes
OIT	Office of Information Technology
PM	Performance Measures
RPMS	Resource and Patient Management System
STI	Sexually Transmitted Infection
TIU	Text Integration Utilities

Contact Information

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

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

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

Email: support@ihs.gov