



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

Panel List User Manual

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Preface

The purpose of this manual is to provide you with the information you need to use the latest enhancements to the Panel List window 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 show you how to perform activities related to the Panel List window in the latest version of the iCare application.

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

- iCare – IHS OIT available at <http://www.ihs.gov/icare/>
- iCare Training available at <http://www.ihs.gov/icare/training>
- Join the iCare listserv by sending an e-mail to icare@listserv.ihs.gov

iCare Graphical User Interface

The iCare GUI is intended to allow healthcare 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 siloed care management.
- Providing an intuitive and integrated interface to the diverse patient data elements of the RPMS database.
- Facilitating providers with 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. You can change the tag selection for any record by selecting or de-selecting any checkbox.
- Clicking the use **AND?** check box when there are multiple tags selected. The **And** option searches for patients who have **ALL** of the user-defined tags.

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 think about 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.

1.0 Introduction

iCare is a computer desktop software application that provides a robust method of interacting with the IHS Resource and Patient Management System (RPMS). It retrieves key patient information from various components of the RPMS database and brings it all together under a single, user-friendly interface. iCare helps providers manage the care of their patients by providing the ability to group common categories (e.g., age, diagnosis, community) and create panels that personalizes the way they are able to interact with and gain valuable insights from patient data.

The information included in this Panel List manual covers Panel List functionality in iCare Version 2.8. For more information about iCare basic functionality, iCare usage, or training for iCare, you can consult the resources listed above in the Preface.

1.1 Background

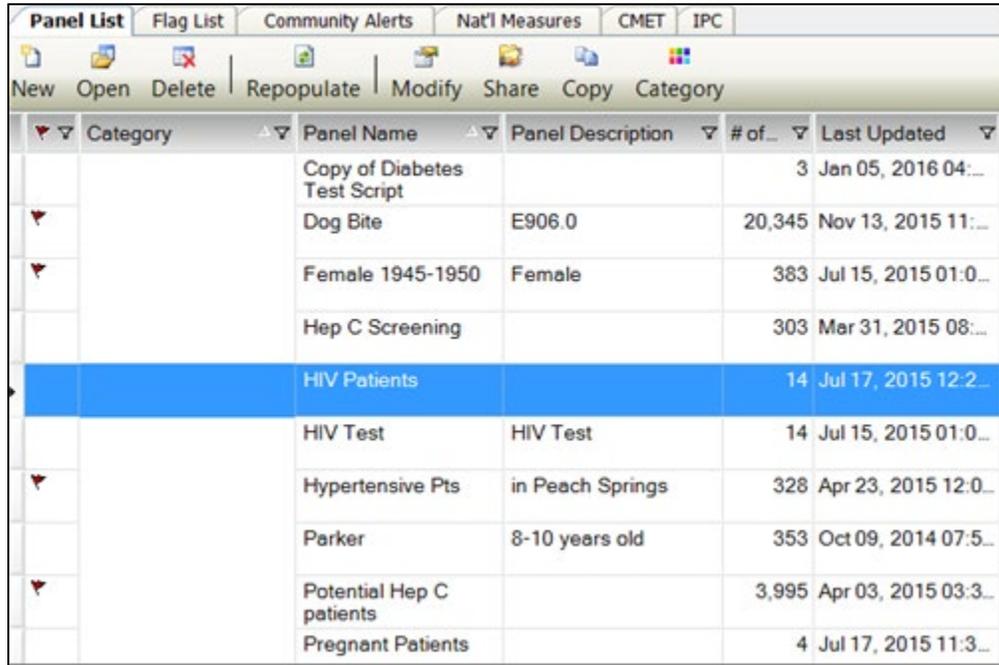
Along with the rest of the healthcare industry, IHS has already developed a set of chronic condition management (or register) applications, including for diabetes, asthma, and HIV. This type of application provides a way for healthcare providers to manage a specific group (register) of patients for a 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 siloed 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.

2.0 System Navigation

2.1 Panel List View

The **Panel List** view displays a list of your current panels, including the default panel, the panels created by the user, and the panels shared with you by other users.



Category	Panel Name	Panel Description	# of...	Last Updated
	Copy of Diabetes Test Script		3	Jan 05, 2016 04:...
	Dog Bite	E906.0	20,345	Nov 13, 2015 11:...
	Female 1945-1950	Female	383	Jul 15, 2015 01:0...
	Hep C Screening		303	Mar 31, 2015 08:...
	HIV Patients		14	Jul 17, 2015 12:2...
	HIV Test	HIV Test	14	Jul 15, 2015 01:0...
	Hypertensive Pts	in Peach Springs	328	Apr 23, 2015 12:0...
	Parker	8-10 years old	353	Oct 09, 2014 07:5...
	Potential Hep C patients		3,995	Apr 03, 2015 03:3...
	Pregnant Patients		4	Jul 17, 2015 11:3...

Figure 2-1: Sample **Panel List** view

The **Startup View** tab on [User Preferences](#) determines the view that will display when you first login to iCare.

To view the **Panel List** window, do one of the following:

- If you are in **Split View**, the **Panel List** will be in the left frame.
- If you are not in **Split View**, you need to click the **Panel List** tab.
- If you are in another window, select the **iCare Main** option from the **Window** menu.

3.0 Package Management

The following provides information about using the iCare features for the Panel List view.

3.1 User Preferences

This section focuses on the user preferences that are used by the Panel List window.

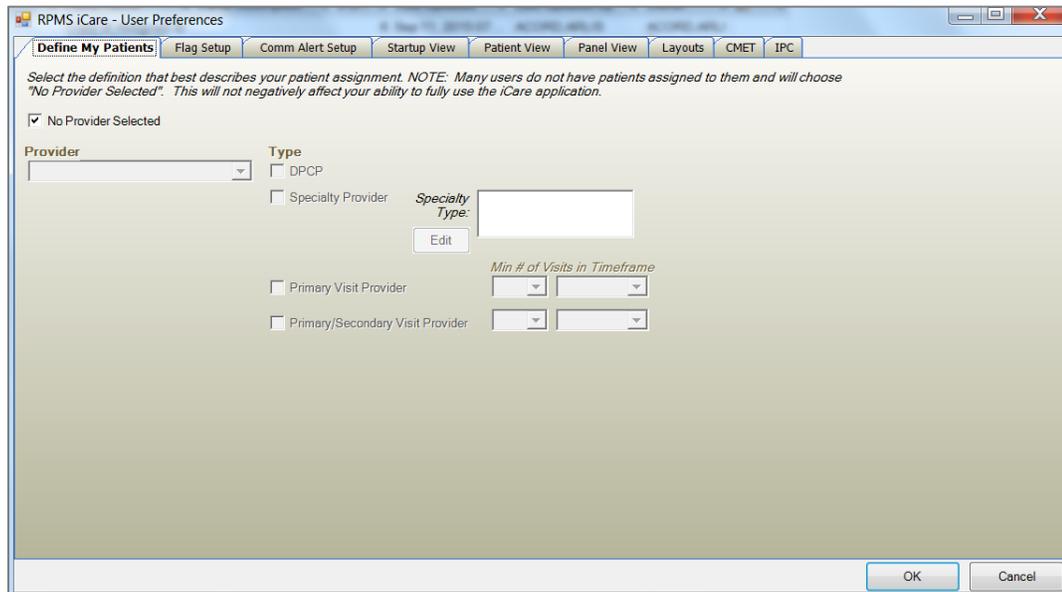


Figure 3-1: Sample User Preferences window

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**.)

Startup View Tab

The selection on **Startup View** tab determines the tab that displays when you first access the iCare application.

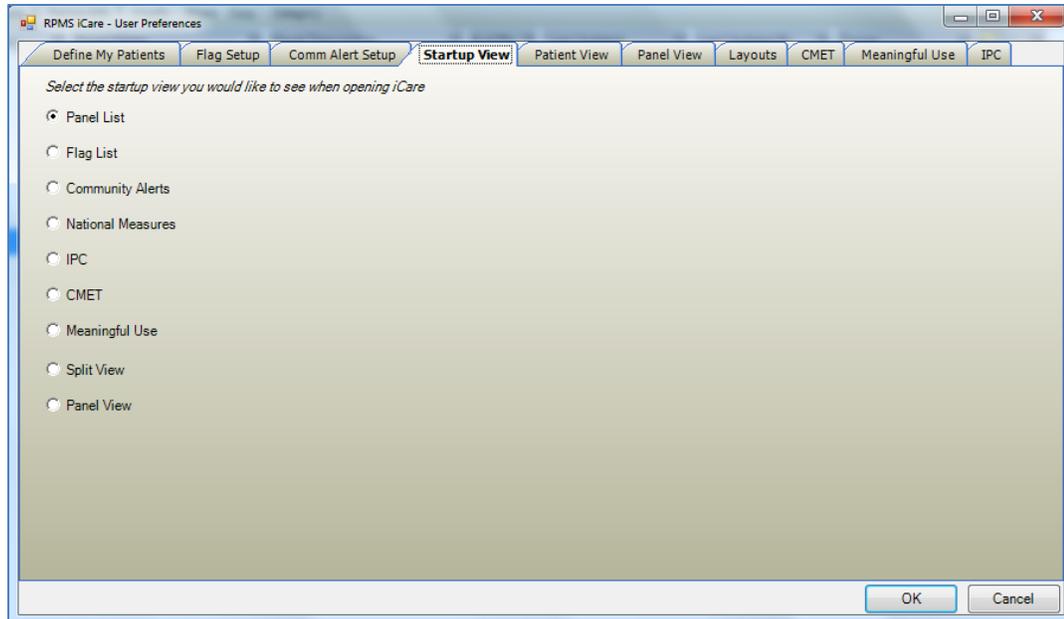


Figure 3-2: Sample **Startup View** tab on User Preferences

Select the **Panel List** option button if you want the **Panel List** to be the first window to display when you access the iCare application.

3.2 Panel Properties

You can view the properties of a highlighted panel by selecting **File | Panel | Properties** (or by selecting the **Properties** option on the context menu). The **Panel Properties** dialog displays. Click **OK** to dismiss the dialog.

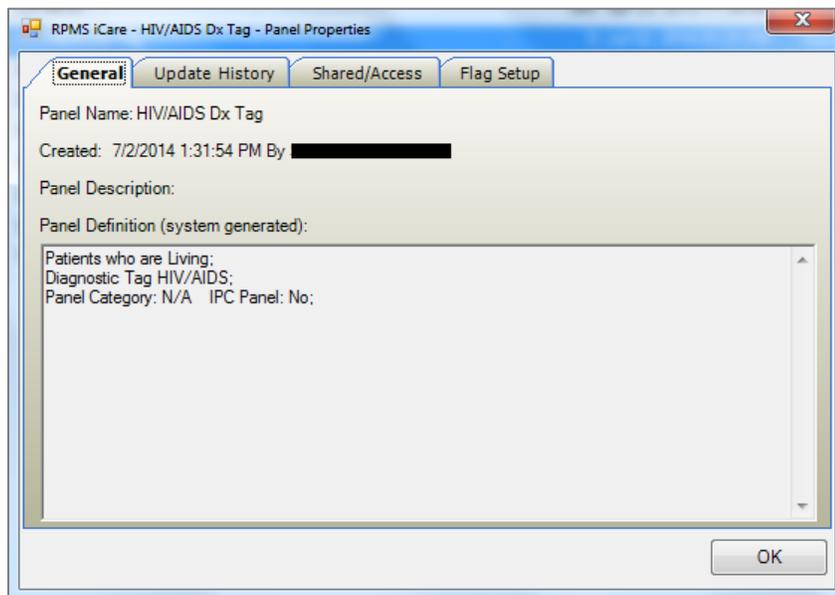


Figure 3-3: Sample Panel Properties dialog

- The **General** tab provides information about the panel name, when the panel was created and who created it, the panel description, and any filters used to create the panel.
- The **Update History** tab provides information about the auto repopulate status, when the panel definition was last modified and who modified it, when the patient list was last populated and who modified it, and when the patient list was manually updated.
- The **Shared/Access** tab provides information about the shared users for the current panel and their access rights.
- The **Flag Setup** tab provides information about the timeframes for the flag types (defined in User Preferences).

3.3 Free Text Fields

Free text fields are those fields that you can type information into; these fields do not have a drop-down list from which to select an option to populate it.

An example of a 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.

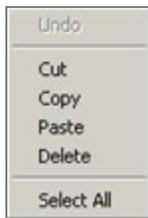


Figure 3-4: Context menu to aid in editing text

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: Highlights all the text in the current field.

3.4 Print Preview

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

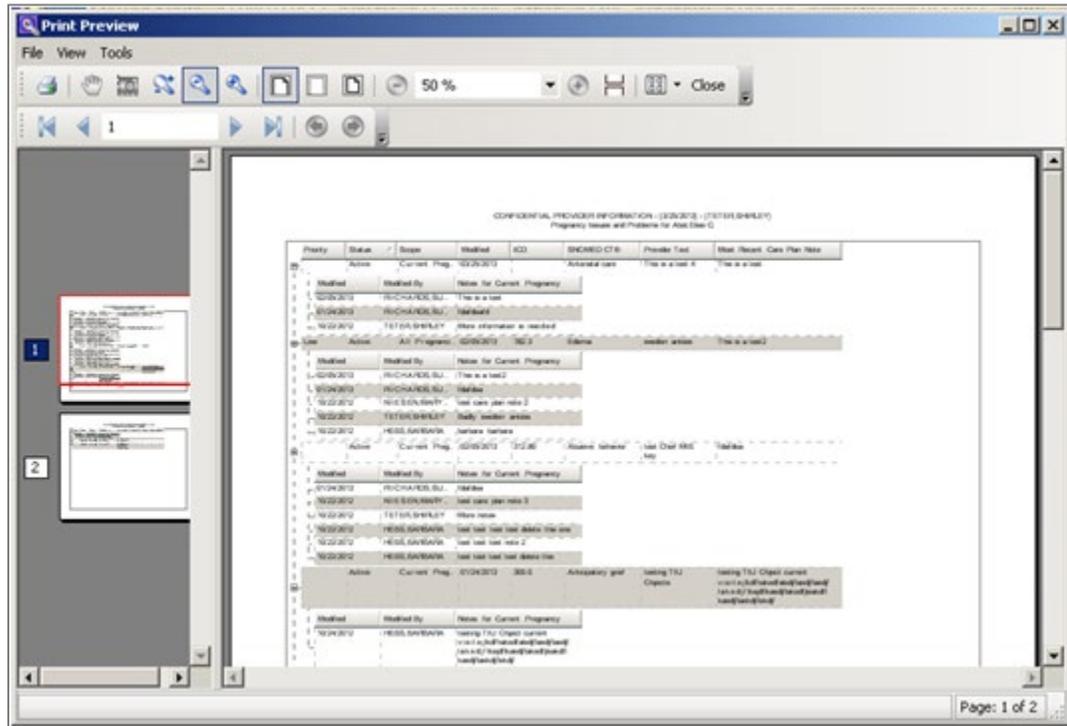


Figure 3-5: Sample **Print Preview** dialog

The **Print Preview** window contains two panels, where 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.

The following table provides information about the various buttons on the Print Preview window.

Button	Description
	Used to output the contents of the document. Also available by selecting Print option on the File menu.
	Used to move the red rectangular box on the selected page in the left panel. As you move the Hand Tool, this changes the display in the right panel. This is used to view information in a particular part of a page. Also available by selecting the Hand Tool option on the Tools menu.

Button	Description
	Used to get a screen capture of a specified rectangular area. This screen capture copies the area to the Windows clipboard. Then you can paste the copy in a particular field, for example, or another application like MS Word. Also available by selecting the Snapshot Tools option on the Tools menu.
	Used to specify the zoom magnification. Click the button and then move to the area where you want to apply to zoom. Right-click on the area and select the zoom magnification option from the context menu. Also available by selecting the Dynamic Zoom Tool option on the Tools menu.
	Used to zoom out by clicking the button in an area in the right panel (the image becomes smaller). Also available by selecting the Zoom Out option on the View menu.
	Used to zoom in by clicking the button in an area in the right panel (the image becomes larger). Also available by selecting the Zoom In option on the View menu.
	Used to cause the image in the right panel to display to its maximum page width (usually enlarges the image). Also available by selecting the Page Width option on the View menu.
	Used to cause the image in the right panel to display the image with no page margins showing. Also available by selecting the Margin Width option on the View menu.
	Used to display the image and its page margins in the right panel. Also available by selecting the Whole Page option on the View menu.
	Used to automatically cause the image in the right panel to zoom out (you do not click in the panel). Also available by selecting the Zoom Out on the View menu.
	Used to automatically cause the image in the right panel to zoom in (you do not click in the panel). Also available by selecting the Zoom In on the View menu.
	Used to cause all the pages to display in the right panel. Also available by selecting the Continuous option on the View menu.
	Used to specify the page layout.

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



Figure 3-6: Buttons used to move through the pages of the document

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

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

Use the **Close** button to close the **Print Preview** dialog. This same action is available by selecting **File | Exit**.

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

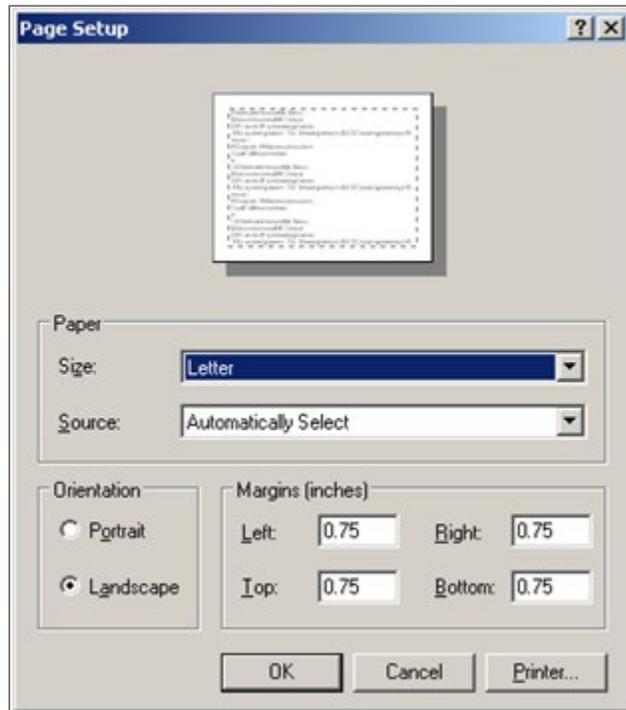


Figure 3-7: Sample **Page Setup** dialog

Use the **Page** group box to specify the paper size and source.

Use the **Orientation** group box to specify the orientation of the output.

Use the **Margins** group box to specify the various margins widths in inches.

Click **Printer** to access the **Printer** dialog where you choose the printer to output the contents of the document.

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

3.5 iCare Package Manager Functions

When you have the Package Manager security key, you can access the functions by selecting **Tools | iCare Package Manager** on the iCare main window.



Figure 3-8: iCare Package Manager Functions

3.5.1 iCare User Access Management

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

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

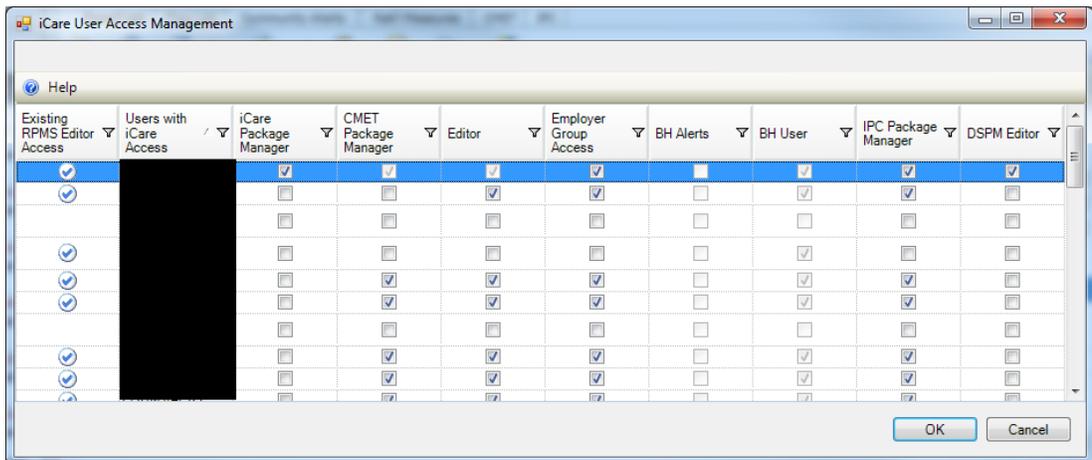


Figure 3-9: Sample iCare User Access Management dialog

For those with the appropriate permissions, you 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. If you want to remove an assigned role, de-select the particular check box.

Note: The BH User column cannot be changed.

Each column heading has hover help.

Some check boxes are checked, and the background is dark.

iCare Package Manager access supersedes CMET Package Manager and Editor permissions. However, iCare Package Manager access does not supersede Employer and BH access due to the sensitive nature of the patient data involved.

3.5.1.1 Existing RPMS Editor Access

The users displayed on this list (those with the iCare user icon (👤) in first column) have been given existing 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)

3.5.1.2 Help Menu

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

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 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.

3.5.1.3 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.

3.5.1.4 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 can access the list of patients who has triggered the Community Alerts. This person also assigns Editor access to other users. In addition, this person can assign the CMET Package Manager role.

3.5.1.5 CMET Package Manager

The CMET Package Manager can 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.

3.5.1.6 Editors

Editors in iCare will have read/write access to: (1) PCC Historical Data Entry; (2) Care Management data; (3) Family History and Reproductive Factors (Snapshot); (4) Designated Specialty Provider Management system (DSPM); (5) Problem List; and (6) CMET Worksheet.

The Editor role will give the person the right to edit the care management function (e.g., HMS Care Management). It also allows the person to enter Historical Data.

3.5.1.7 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.

3.5.1.8 BH Alerts

Exclude non-BH alerts.

3.5.1.9 BH User

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

3.5.1.10 IPC Package Manager

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

3.5.1.11 DSPM Editor

The DSPM Editor can update patient provider information in iCare.

3.5.2 Reassign Panels

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

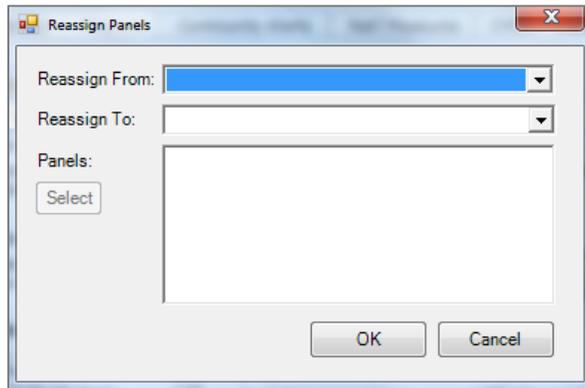


Figure 3-10: **Reassign Panels** dialog

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

Reassign From: Select the user whose panels you want to reassign from the drop-down list.

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

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

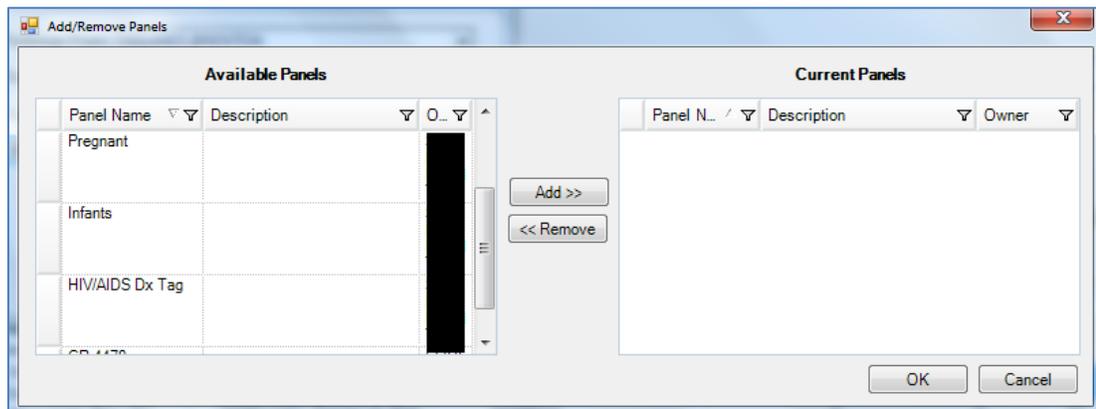


Figure 3-11: Sample **Add/Remove Panels** dialog

After the [Add/Remove](#) dialog is complete, click **OK** and 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 display in the **Reassign To** user panel view. (Otherwise, click **Cancel**.)

3.6 iCare Taxonomy Editor Function

The **iCare Taxonomy Editor** holds the security key (BQIZTXED) allowing that person to read/edit iCare taxonomies.

You access the **iCare Taxonomy View/Edit** dialog by either selecting **Tools | Taxonomy Maintenance | View/Edit Taxonomy Entries**.

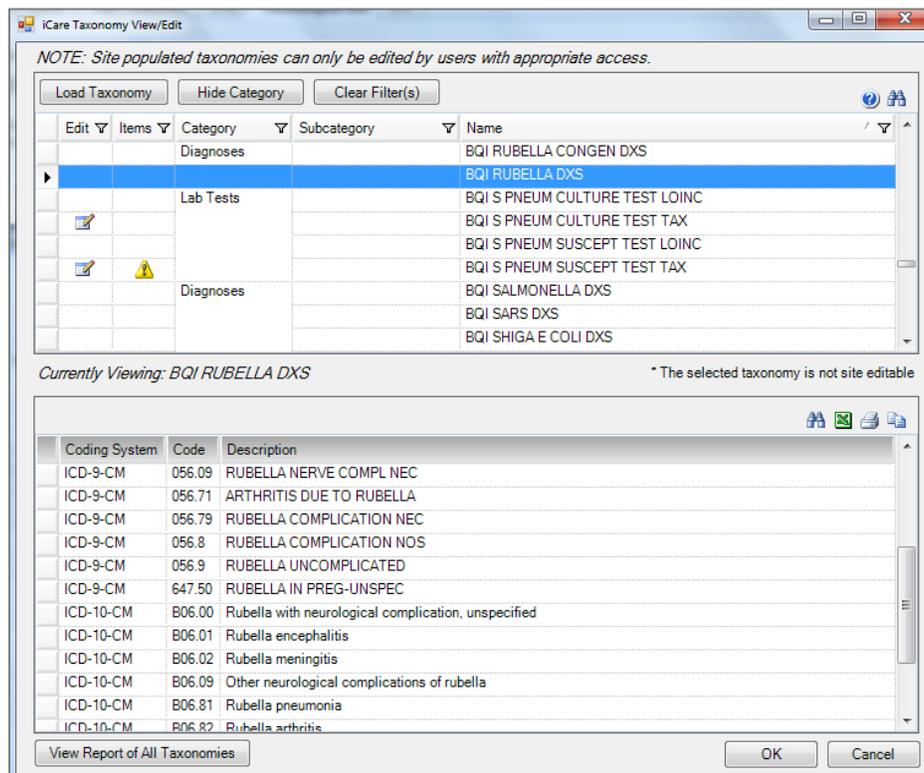


Figure 3-12: Sample **iCare Taxonomy View/Edit** dialog

Note: If you do not hold that security key, you can only view the information on the dialog. The following information displays: You do not currently have access rights to edit taxonomies. In order to edit taxonomy entries, you will need to have the iCare Taxonomy Editor security key (BQIZTXED) added to your RPMS user account.

When you first access this view/edit dialog, all parts of the tree structure will be collapsed. You need to expand one of the tree parts and find the taxonomy you want to edit.

In general, select the taxonomy from the list in the left group box that you want to view. 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 when this condition exists. Site populated taxonomies can only be edited by users with appropriate access.

The difference between **Apply** and **OK** is that the **Apply** button is used when you add more than one taxonomy value to the **iCare Taxonomy View/Edit** dialog.

3.6.1 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.

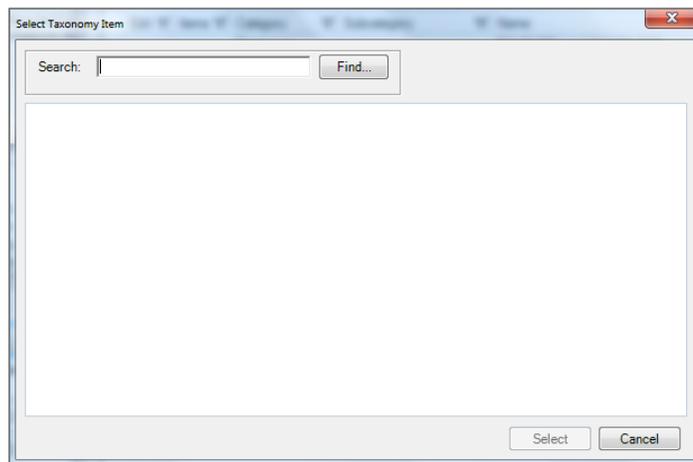


Figure 3-13: **Select Taxonomy Item** dialog

Use the **Search** field to search for a taxonomy item. Highlight the item you want to add and click **Select**. The application checks to see if it is already there.

- A warning message will display if the item already exists (click **OK** to dismiss the message); after clicking **OK**, you return to the **iCare Taxonomy View/Edit** dialog.
- If it does not exist, it appends the selected item to the bottom of the list.

After you finish adding taxonomy values, click **Apply** to save your changes. If you do **not** click **Apply** and try to move to another taxonomy or another part of the iCare application, the **Save Taxonomy changes?** information message displays, asking if you want to apply the changes now. In this case, click **Yes** to apply the changes (otherwise, click **No**).

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

3.6.2 Remove Taxonomy Values

If you want 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**). You remain on the **iCare Taxonomy View/Edit** dialog.

3.6.3 View Report of All Taxonomies Button

Click the **View Report of All Taxonomies** button to display the **Taxonomy Report** dialog.

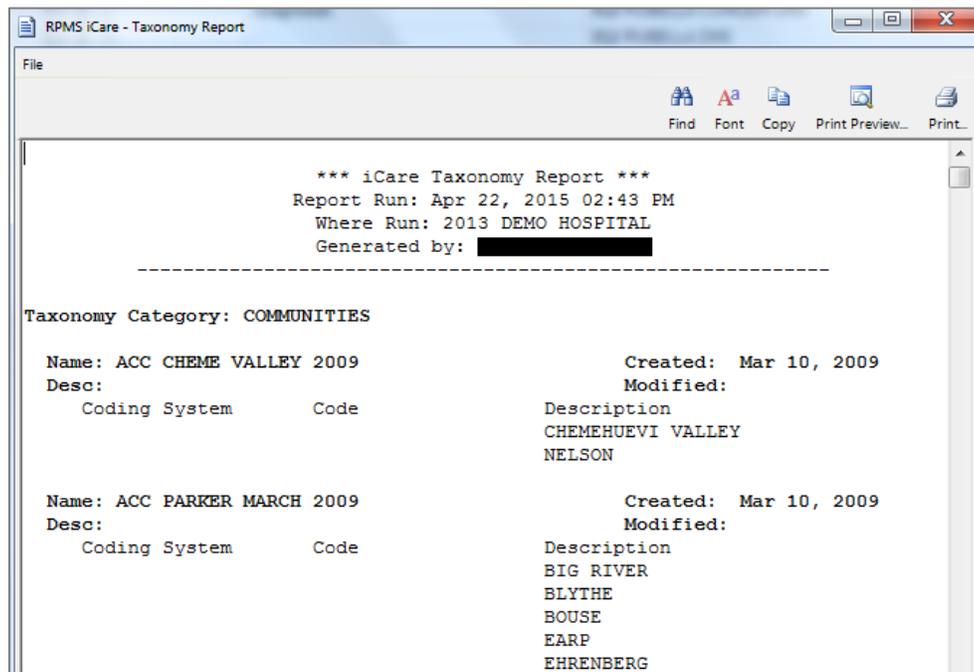


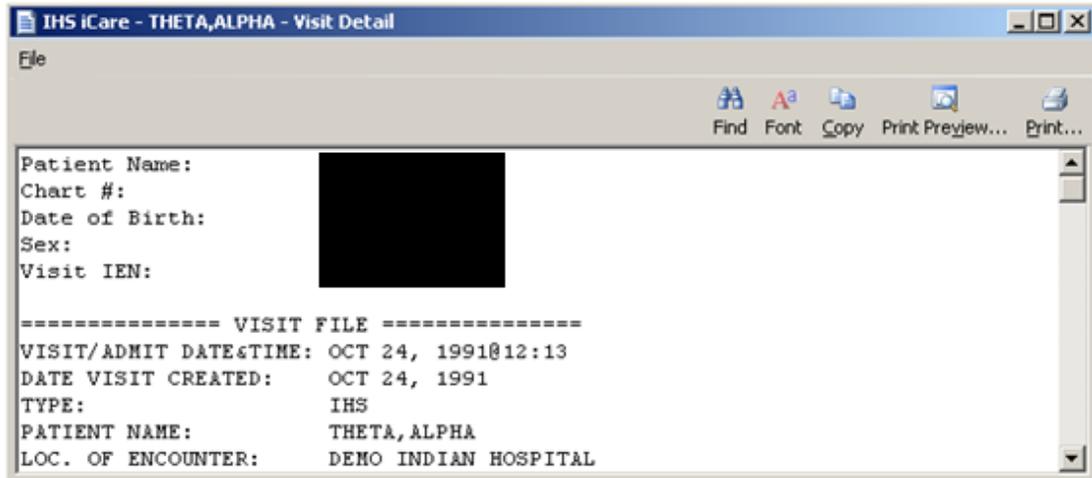
Figure 3-14: Taxonomy Report

This dialog provides information about various Taxonomy Categories (listed in alphabetical order).

See Section 3.7 for information about the File menu and buttons on the dialog.

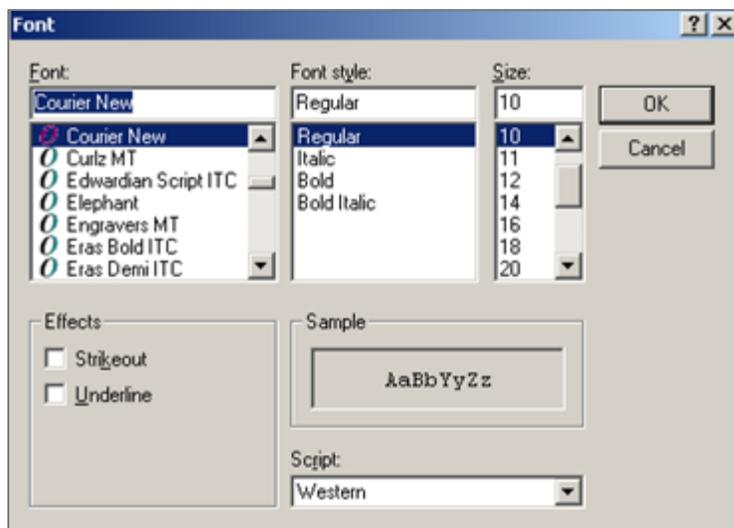
3.7 Dialog Functionality

Several places in iCare you will be viewing a dialog. For example, if you double-click on any row in the **Recent Visits** group box on the **Cover Sheet of the Patient Record** window, you will view a dialog.

Figure 3-15: Sample **Visit Detail** dialog

You can take the following actions on this dialog:

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

Figure 3-16: **Font** dialog

Here you can change the Font name, style, and size of the text in the dialog (applies to all the text). In addition, you can add effects like Strikeout and Underline. These functions perform like those effects indicated in MS Word.

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

Click **OK** to apply your changes to the text in the current dialog. These changes are only effective for the current view of the dialog. (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](#). You can print the contents of the dialog from this dialog.
- Click the **Print** () button to display a print dialog where you specify the printer to output the contents of the dialog, 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 (dismisses the dialog).

3.8 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.

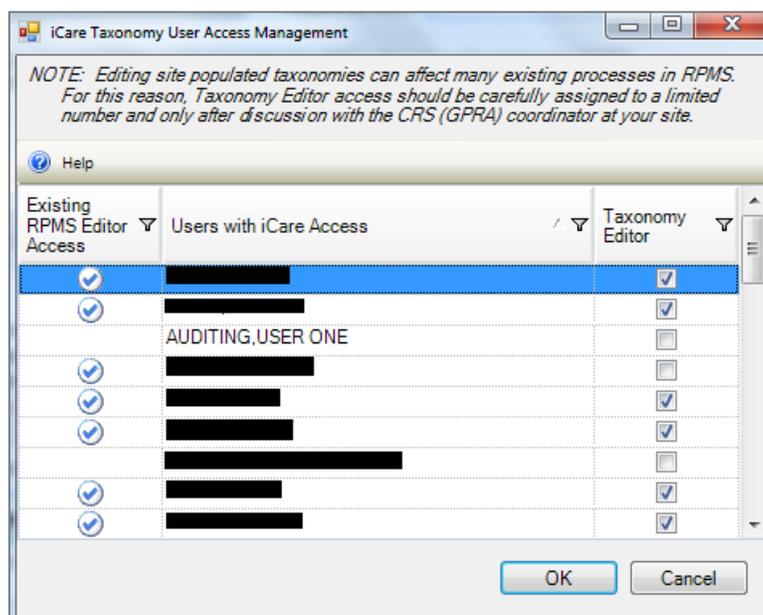


Figure 3-17: iCare Taxonomy User Access Management for Taxonomy Editor

Each of the column headings has hover help.

3.8.1 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).

3.8.2 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.

3.8.3 Taxonomy Editor

Those with a checkmark are taxonomy editors who can add and delete members from any Site Populated Taxonomies related to either laboratory tests or medications.

3.8.4 Help Menu

The following information displays when you click 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 Manage access to iCare to a user who does not have basic access. See your Site Manager to require basic iCare access for other users.

Change RPMS Server/Login

The **Change RPMS Server/Login** option appears on the **File** menu. Select this option to access the **iCare 2.8 GUI Login** dialog.

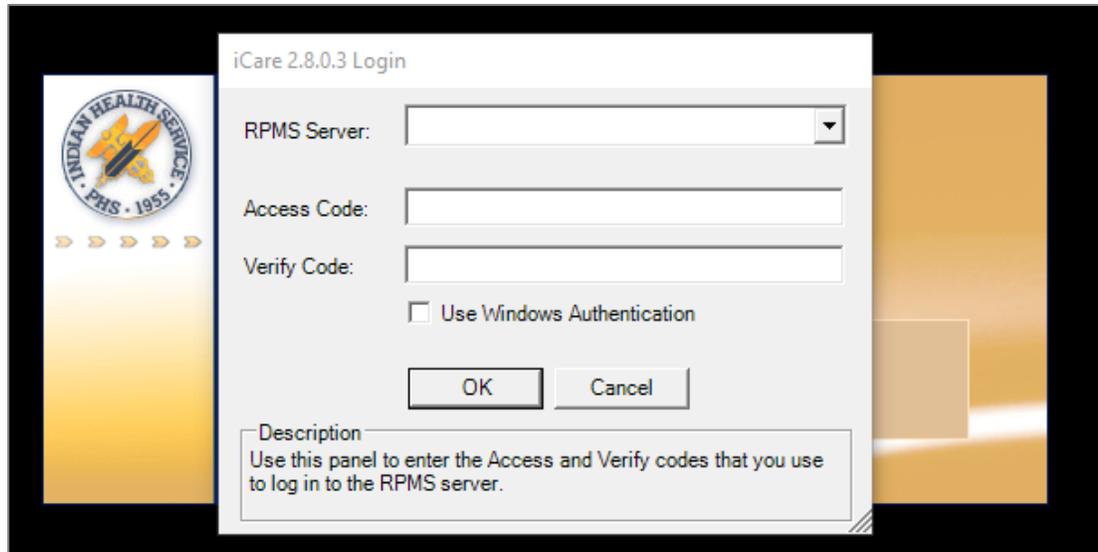


Figure 3-18: Sample **iCare 2.8 GUI Login** dialog

RPMS Server

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

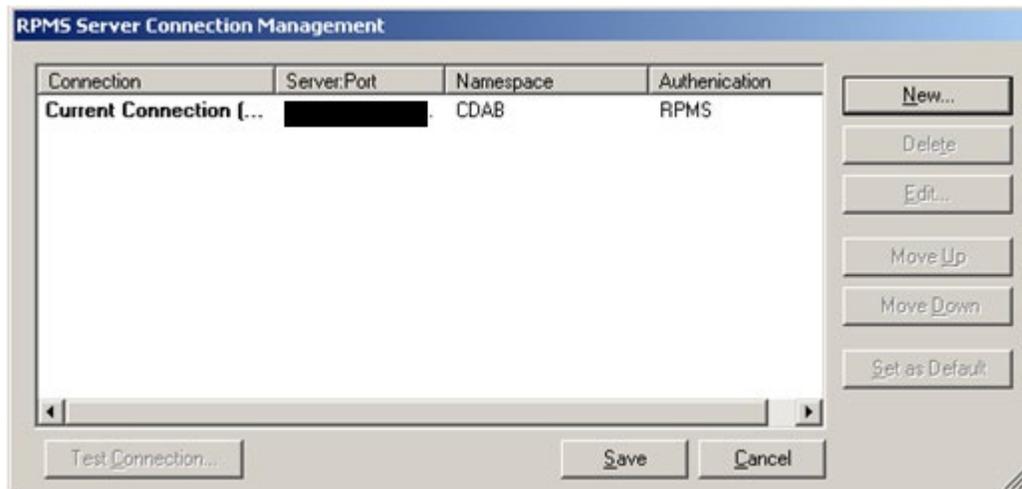


Figure 3-19: Sample **RPMS Server Connection Management** dialog

Select an option on the grid or use the **New** function to create a new connection.

Click **New** to access the **Edit RPMS Server Connection** dialog.

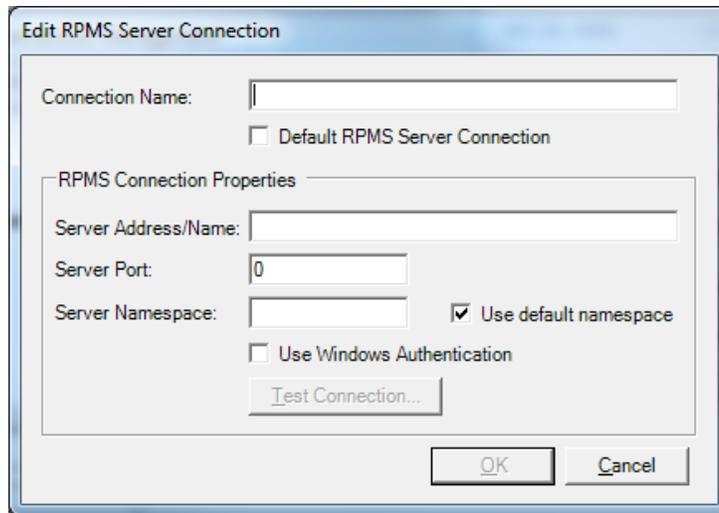


Figure 3-20: **Edit RPMS Server Connection** dialog

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., 161.223.99.999. Your Site Manager will provide this information.

Server Port

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

Server Namespace

If your site has multiple databases on one server, you will additionally need to type the namespace, which is typically a text string, e.g., DEVEH.

Use default namespace

Select this check box if the Server Namespace is the default one you want to use.

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 then click **OK**.

- After clicking **OK**, if the connection is correct, the application displays the **Connection Test** message that states: “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 appear 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.

3.9 iCare Site Parameter Options

You access the **iCare Site Parameters** on the **Tools** menu.

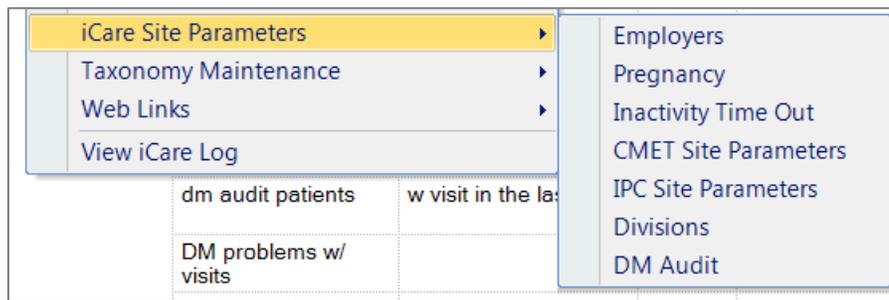


Figure 3-21: **iCare Site Parameter** options

3.9.1 Employers

Use the **Employers** option to determine the list of employers that should be used for employee health. This is a table of all employers in your RPMS system, many of which can have several different name spellings. Select the **Employers** option to access **iCare Site Parameters – Employers** dialog.

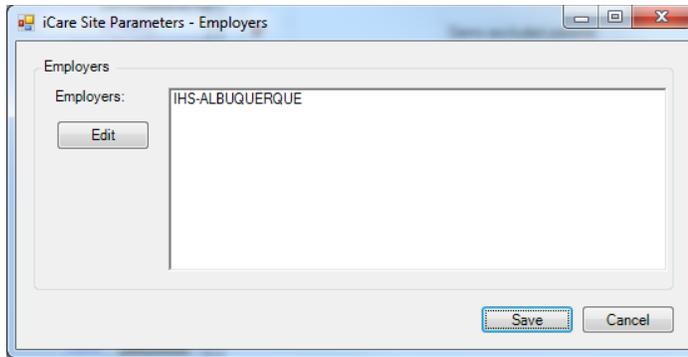


Figure 3-22: Sample **iCare Site Parameters – Employers** dialog

The current employers are listed in the **Employers** field.

Use the **Edit** button to edit the **Employers** field. Click **Edit** to access the **Add/Remove Employers** dialog.

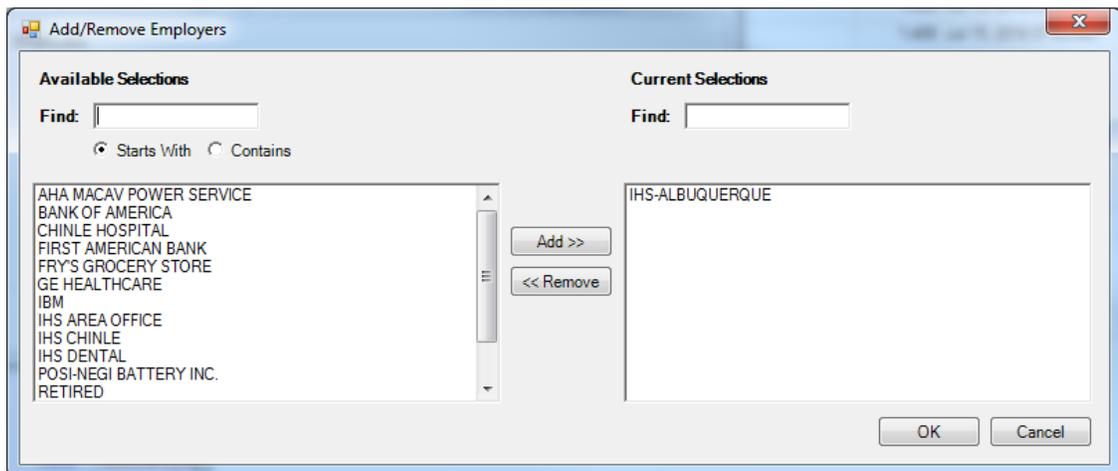


Figure 3-23: Sample **Add/Remove Employers** dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box populates the **Employers** field on the **iCare Site Parameters – Employers** dialog. (Otherwise, click **Cancel**.)

3.9.2 Pregnancy

Use the **Pregnancy** option to determine the definition of pregnancy by a choice of two methods for calculation. Select the **Pregnancy** option to access the **iCare Site Parameters – Pregnancy** dialog.

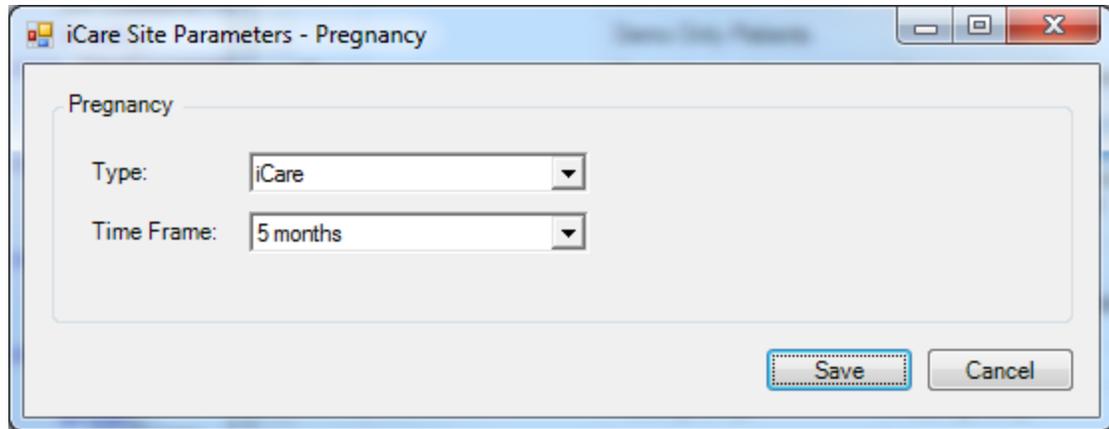


Figure 3-24: Sample **iCare Site Parameters – Pregnancy** dialog

Type

The default method is based on CDC influenza disease-reporting (ILI) logic where pregnancy must be medically indicated in the last 60 days. Select an option from the drop-down list to populate the **Type** field. If the **ILI** is selected, then the **Time Frame** field does not display on the dialog.

Time Frame

The second method of calculation is iCare-specific and can be set to where pregnancy has been medically indicated in the last 1-month to 9-month time period. Select an option from the drop-down list to populate the **Time Frame** field.

When the dialog is complete, click **Save** to save the pregnancy parameters. (Otherwise, click **Cancel**.)

3.9.3 Inactivity Time Out

iCare incorporates time out features to ensure secure usage in clinical community workstation environments. Use the Inactivity Time Out option to determine the inactivity time out, inactivity warning message time out, and application shutdown time out.

Select the **Inactivity Time Out** option to access the **iCare Site Parameters – Inactivity Time Out** dialog.

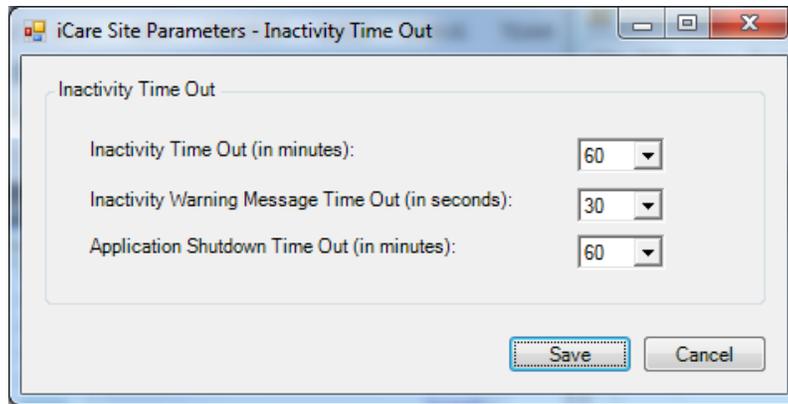


Figure 3-25: Sample **iCare Site Parameters – Inactivity Time Out** dialog

Inactivity Time Out

Select an option from the drop-down list that determines the number of minutes before the application locks the application from further use by the current user.

Inactivity Warning Message Time Out

Select an option from the drop-down list that determine the number of seconds before the **Inactivity Warning Message** displays.

Application Shutdown Time Out (in minutes)

Select an option from the drop-down list that determines the number of minutes before the application will shut down.

3.9.4 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** window.

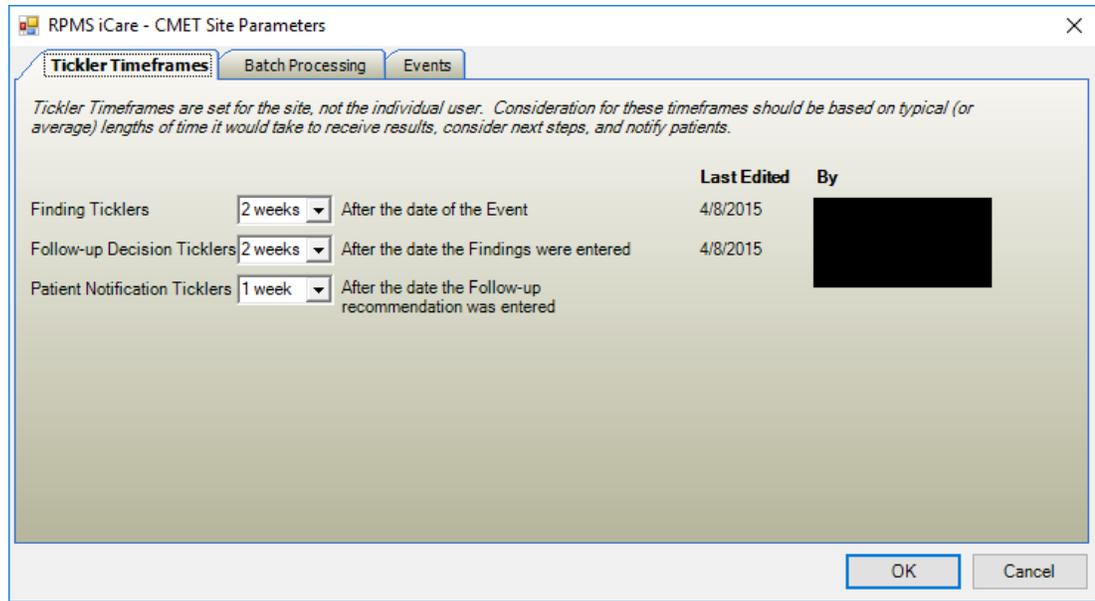


Figure 3-26: Sample **RPMS iCare – CMET Site Parameters** dialog

Tickler Timeframes

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

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

After you change one or more settings click **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**, based on the event date. The Tickler is initiated from the date of the event.
- **Follow-up Decision Ticklers**. Ticklers are initiated from the date the Findings were entered.
- **Patient Notification Ticklers**. Ticklers are initiated from the date the Follow-up recommendation is entered.

Timeframes 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 was entered.

Batch Processing Tab

The **Batch Processing** tab sets the timeframe and notification type for the Pap Smear and Mammogram Screening events with normal results. In addition, you can set the type of Normal Finding for the Mammogram Screening event.

RPMS iCare - CMET Site Parameters

Tickler Timeframes **Batch Processing** Events

Batch Processing can be done for multiple patients with "Normal" results for Pap Smears or Screening Mammograms. Select the Findings, Timeframe (follow-up interval); and Notification Types that will be entered when performing CMET Batch Processing.

Event Name	Timeframe	Notification Type	Last Edited	By
Pap Smear	1 year	LETTER		
Mammogram Screening	1 year	LETTER	6/21/2016	

Normal Finding for Mammogram Screening

BI-RAD CATEGORY 1 - NEGATIVE

OK Cancel

Figure 3-27: Sample **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 a 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 determines what is a “normal” finding.

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

After you change one or more settings and click **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 Tab

The **Events** tab allows the setting of default value for CMET events.

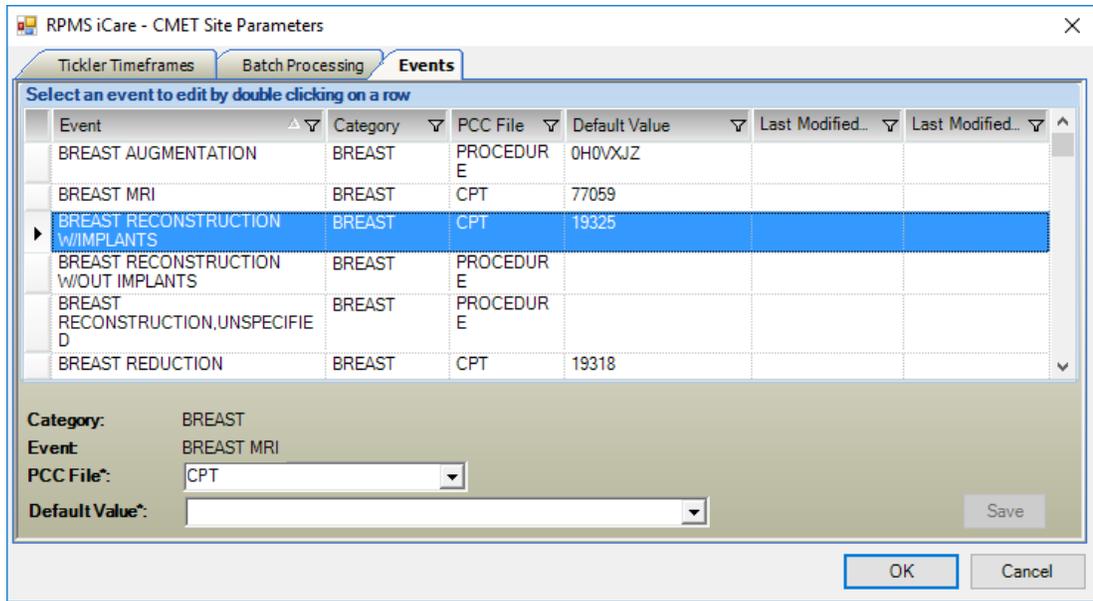


Figure 3-28: Sample **Events** tab

- Select the row with the event to modify.
- Set PCC File type.
- Set Default Value.
- Click Save to save changes.

3.9.5 IPC Site Parameters

Use the **IPC Site Parameters** option to determine the following IPC parameters: (1) IPC Version, (2) day of month to run IPC data collection, (3) clinics where the patient receives primary care.

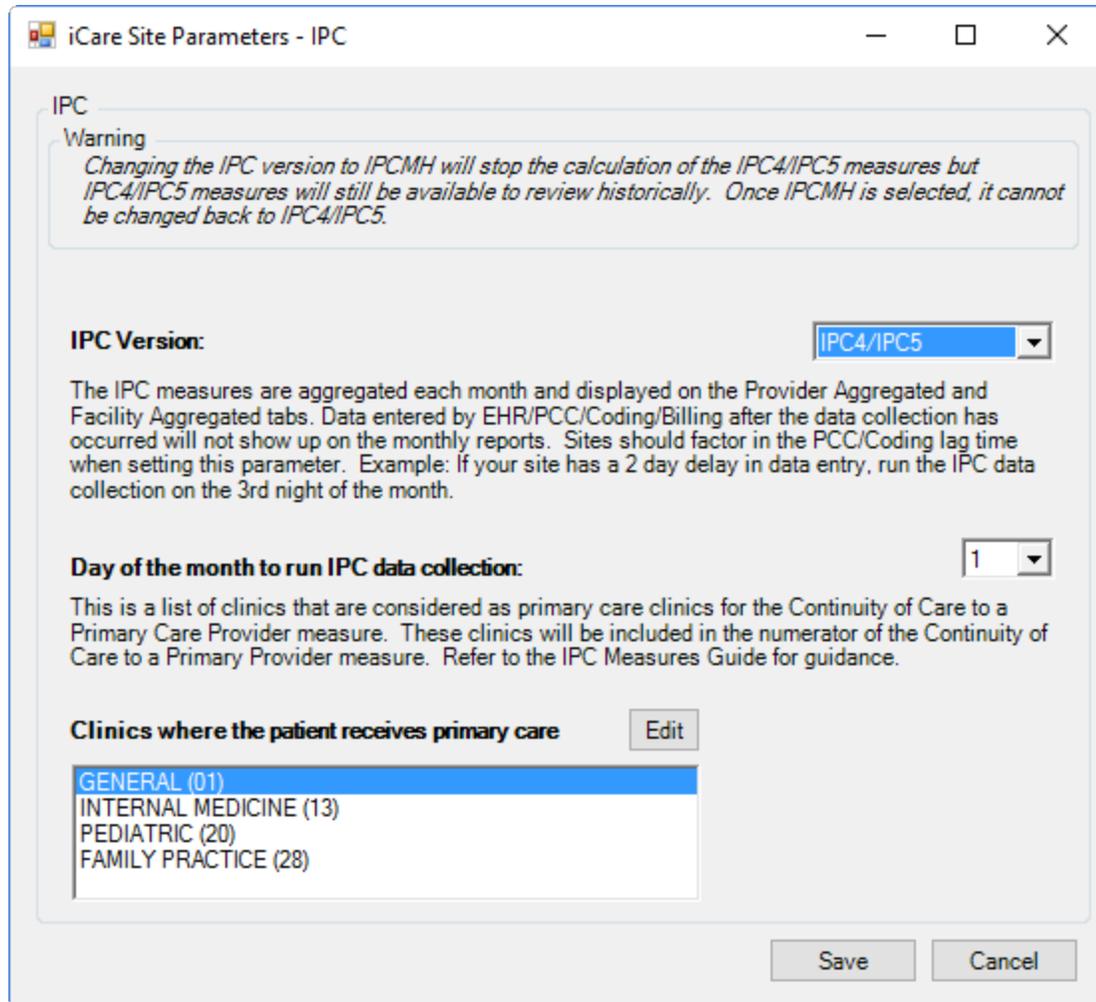


Figure 3-29: Sample **iCare Site Parameters – IPC** dialog

IPC Version

Select the **IPC Version** using the drop-down.

Day of month to run IPC data collection

Select from the drop-down list the option that specifies the day of the month on which to run the iCare IPC data collection.

Clinics where the patient receives primary care

This field determines the type of local clinics to be designated as primary care. Click **Edit** to access the **Add/Remove Visit Clinics** dialog.

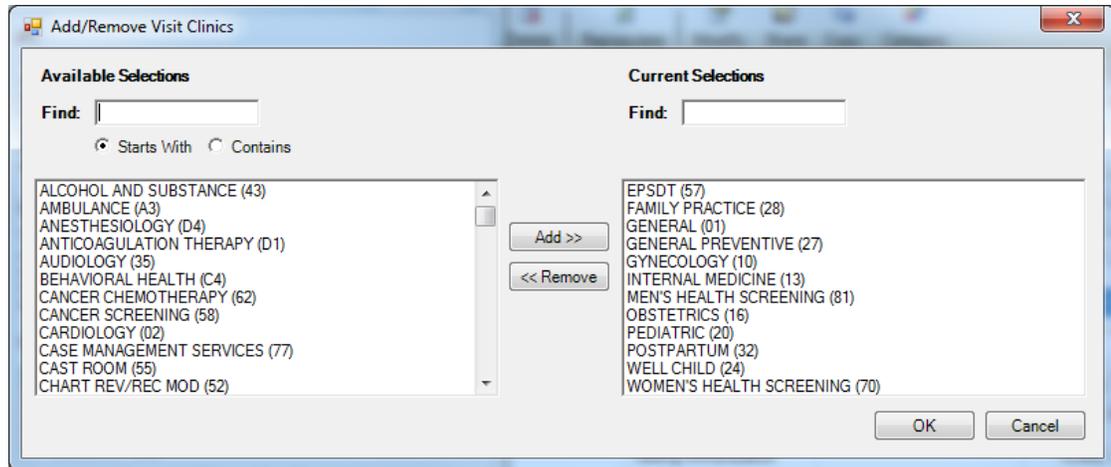


Figure 3-30: Sample **Add/Remove Visit Clinics** dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box populates the **Clinics where the patient receives primary care** field.

3.9.6 Divisions

Use the **Divisions** option to determine the divisions for your site. Select the **Divisions** option to access the **iCare Site Parameters – Divisions** dialog.

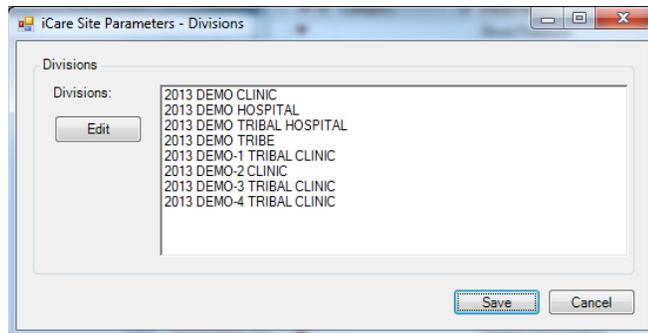


Figure 3-31: Sample **iCare Site Parameters – Divisions** dialog

The listed divisions are those used by your site. Click **Edit** to access the **Add/Remove Divisions** dialog.

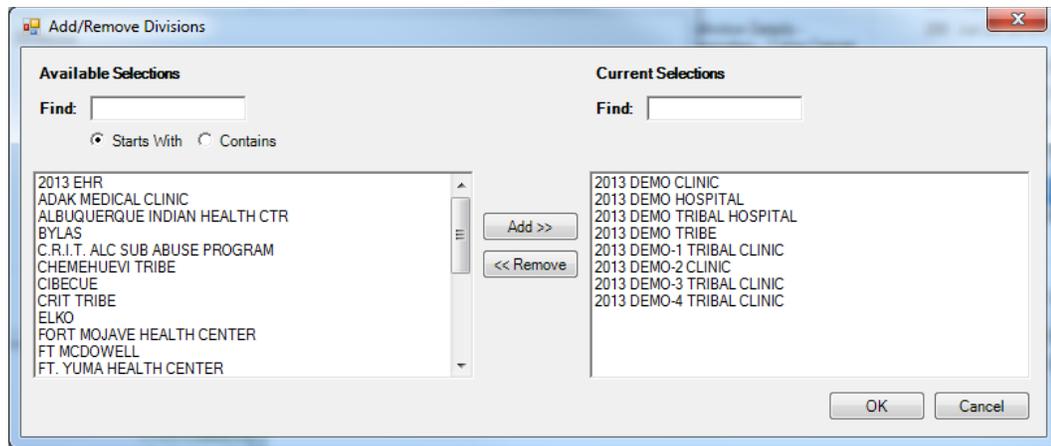


Figure 3-32: Sample **Add/Remove Divisions** dialog

When the **Add/Remove** dialog is complete, click **OK** and the options in the **Current Selections** group box will populate the **Divisions** field on the **iCare Site Parameters – Divisions** dialog. (Otherwise, click **Cancel**.)

3.9.7 DM Audit

Use the **DM Audit** option to set the register used by DM Audit. Select the **DM Audit** option to access the **iCare Site Parameters – DM Audit** dialog.

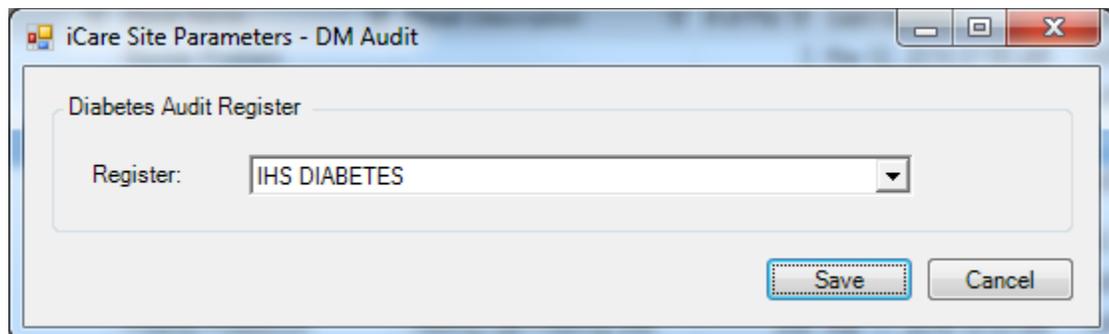


Figure 3-33: Sample **iCare Site Parameters –DM Audit** dialog

The listed registers are those available at your site. Use the drop-down to select the register to associate with DM Audit.

3.10 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.

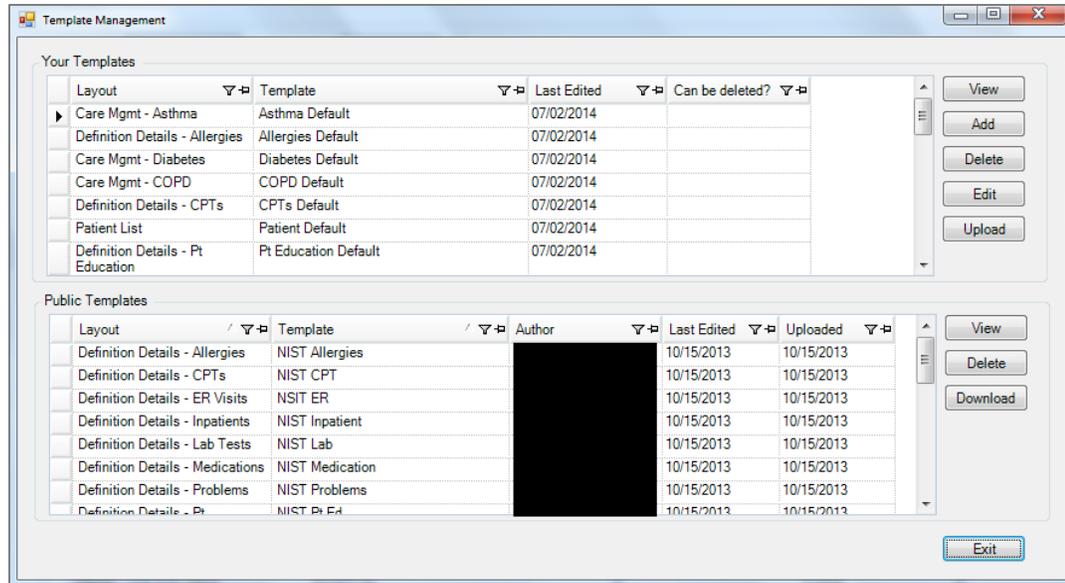


Figure 3-34: Sample **Template Management** dialog

The **Your Templates** group box contains a list of all 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**.

3.10.1 View

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

3.10.2 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).

3.10.3 Download

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

3.10.4 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 then click **Delete**. The **Delete Template** information message display confirming the deletion. Click **Yes** to delete (otherwise, click **No**.)

3.10.5 Edit

The **Edit** action is available in the **Your Templates** group box. Select a template to edit and then click **Edit**. You access the template of columns for the selected template. Section 3.10.6.1 provides information about how to use this template.

3.10.6 Add

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

Layout: Select an option on the **Layout** drop-down list to specify the layout to be used for the new template.

After populating the **Layout** field, the **Template Name** field appears.

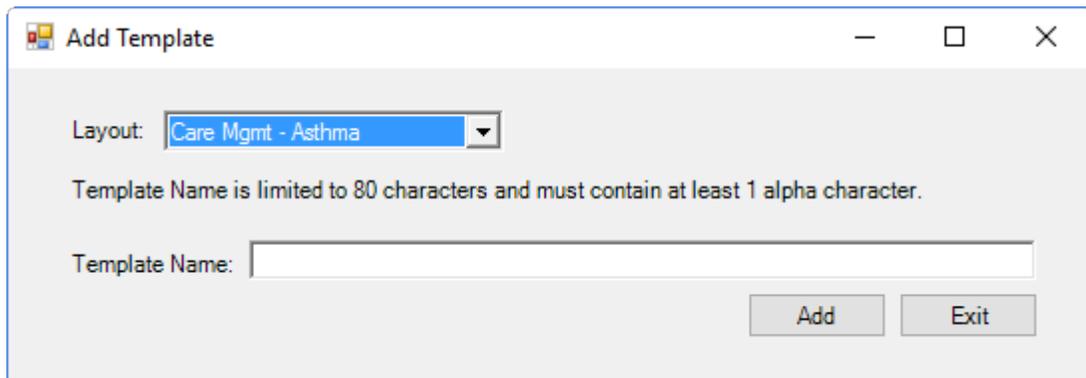


Figure 3-35: **Add Template** dialog with added field

Template Name: Type the name of the template in this free text field, limited to 80 characters and must contain at least one (1) alpha character.

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

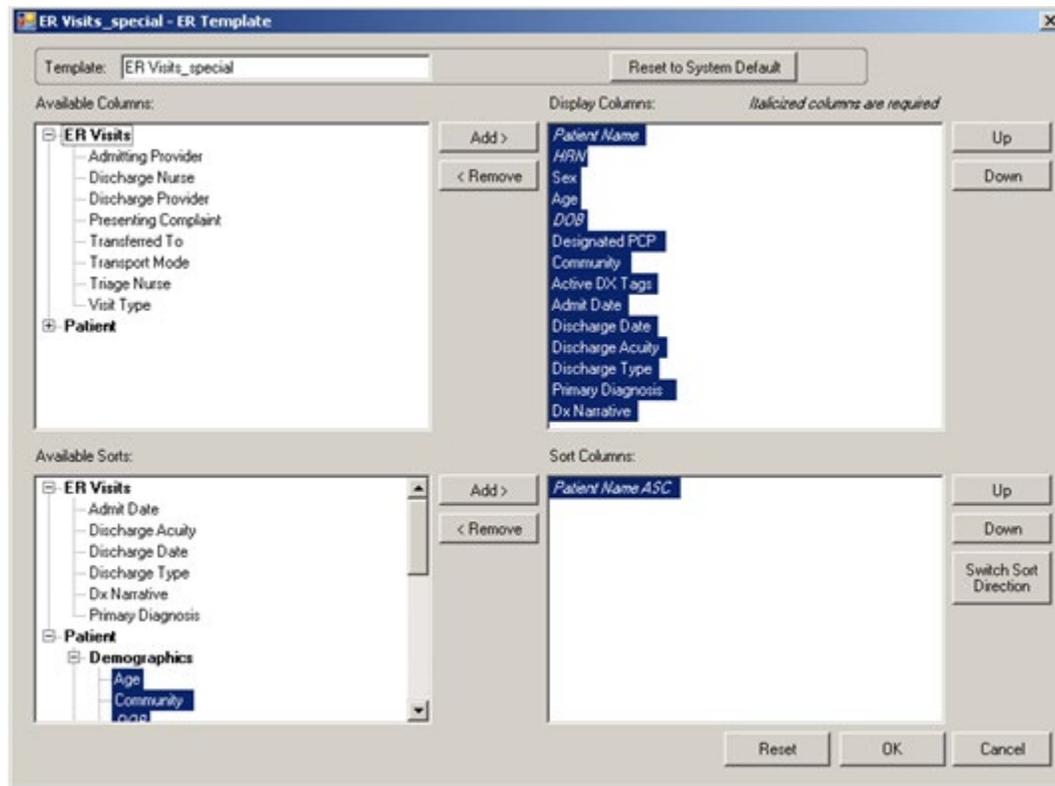


Figure 3-36: Sample template for new template created

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

If you changed several things about the columns on the template and you want to undo those changes, click **Reset**.

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

3.10.6.1 Display and Available Columns

Use the **Display Columns** to determine what columns you want to display for the particular window or tab.

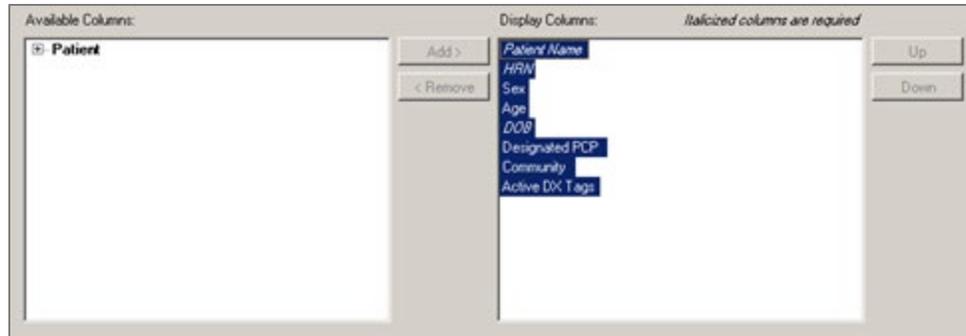


Figure 3-37: Sample **Display** and **Available** columns

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, you can 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: You cannot remove any column names in italics.

You can 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. You might have to click the button more than once to move it to the desired location.

3.10.6.2 Columns to Sort

Sort a column to arrange the items in alpha-numeric order.

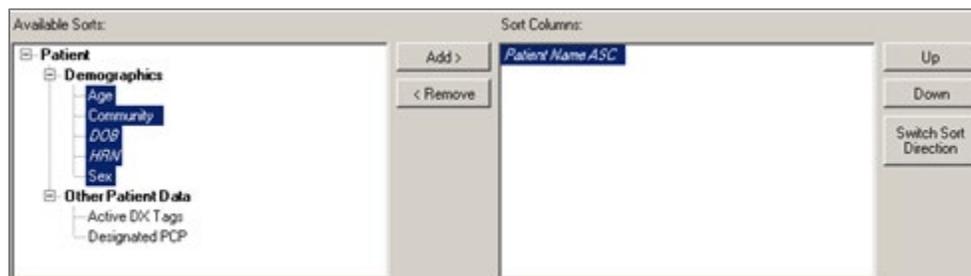


Figure 3-38: Sample **Available Sorts** and **Sort Columns** area

To move a highlighted column name in 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, you can remove a highlighted column in 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.

Note: You cannot remove any column names in italics.

3.10.6.3 Column Sort Order

You use the **Sort Columns** area to determine what columns you want to sort for the particular window or tab.

You determine which order the columns are sorted in the **Sort Columns** area by using the **Up** and **Down** buttons. Highlight a column name and click the appropriate button. You might have to click the button more than once to move it to the preferred location. For example, if you have Gender, Patient Name, and Diagnosis Tags in the right column, the Gender sort is applied first, then the Patient Name, and the Diagnosis Tags is last.

3.10.6.4 Switch Sort Direction

The names of columns in the Sort Columns area show “ASC” appended to the name, for example, Patient Name ASC. You can 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. You can use the **Switch Sort Direction** button on more than one column.

4.0 Package Operation

4.1 Panel List Layout

Category	Panel Name	Panel Description	# of...	Last Updated	La
Reminders	Overdue Reminders	Pap Smears	503	Sep 15, 2014 03:...	
	Mammogram reminders	in Peach Springs 20-35 yrs	99	Apr 07, 2015 02:0...	
	Pap Reminders		453	Apr 20, 2015 09:0...	
IPC	Assigned to Pride		52	Jul 18, 2014 02:2...	
DM	Diabetes	in Chemehuevi Valley	56	Jul 18, 2014 02:3...	
	Diabetics Peach Springs		329	Dec 31, 2015 11:...	
	Diabetes Test Script		3	Jan 05, 2016 04:...	

Figure 4-1: Sample **Panel List** layout

The **Panel List** has the following data columns:

Flag: The Flag Indicator (♥) icon displays in the first column if one or more patients in any of the panels have any flags.

Category: User-defined category name (and colors) for grouping panels

Panel Name: User-defined name of the panel (required). Hover help for this field displays the [properties of the panel](#).

Panel Description: User-defined description of the panel.

of Pts: The number of patients in the panel.

Last Updated: The date and time the contents of the panel was last updated by a manual (user) repopulate, by an auto-repopulate, or the panel created date, if the panel has never been repopulated.

Last Updated By: The name of user who either created or last repopulated the panel.

Owner: The name of the user who created (owns) the panel.

Shared With: This column has different icons representing whether a panel has been shared by you with other users or shared with you by a user.

You can view how your patient panel is shared by hovering your mouse over the last column of the panel.

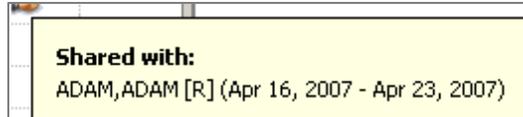


Figure 4-2: Sample **Shared With** Information

The icons in the **Shared With** column have the following meanings:

The  icon means you have Read/Write access to the panel.

The  icon means you created the panel. If you have not shared it, the field will be blank; if you have, the field will be populated with . A mouse hover shows share names.

The  icon means you have read-only access to the panel.

You can sort and/or filter any column, re-arrange the order of the columns, etc.

5.0 Panel List Toolbar

The toolbar buttons and menu options determine what actions can be taken on this window.



Figure 5-1: Panel List toolbar

5.1 New

Use the **New** function to create a new panel. You can create a patient panel in one of the following ways:

- Clicking the **New** ( **New**) button
- Selecting the **New** option on the context menu
- Selecting **File | Panel | New**
- Pressing the key combination of Ctrl-N

Any of the above actions displays a blank **Panel Definition** window where you can create a new panel.

5.2 Open

Use the **Open** function to show the patients in one or more selected panels. Highlight the panels by holding down the Ctrl key and then use the **Open** function.

You can open selected panels by doing one of the following:

- Clicking the **Open** ( **Open**) button
- Selecting **File | Panel | Open**
- Selecting the **Open** option on the context menu
- Double-clicking on the panel
- Pressing the Ctrl-O key combination
- Selecting **File | Recent Panels** and selecting the panel name (the list is limited to the last five panels that you have viewed)

A **Panel View** window displays for each of the selected panels, showing the patients for the panel.

More than one user can open a shared panel simultaneously. The second and subsequent users to open the same panel will have read only access to the panel content. If the first user closes the panel, the second user will be notified that the panel is now available for edit access, unless the user only has been provided with Shared Read Only access by the panel creator.

5.3 Delete

You can delete the selected panels that are no longer useful. There are two conditions for the delete function: (1) when you delete a panel you created and (2) when you delete a panel that was shared with you.

5.3.1 Delete Panel You Created

To delete a panel you created, highlight one or more panels by holding down the Ctrl key and then using the **Delete** function.

You can delete the selected panels by doing one of the following:

- Clicking the **Delete** () button
- Selecting **File | Panel | Delete**
- Selecting the **Delete** option on the context menu
- Pressing the **Delete** key on your keyboard

The **Confirm panel delete** dialog displays, asking if you want to delete the selected panels. Click **Yes** to delete the panels. Their names will no longer display in the **Panel List** view. (Otherwise, click **No.**)

Shared users with shared access to the deleted panel will receive notification that you (the person who deleted the panel) are no longer sharing the panel.

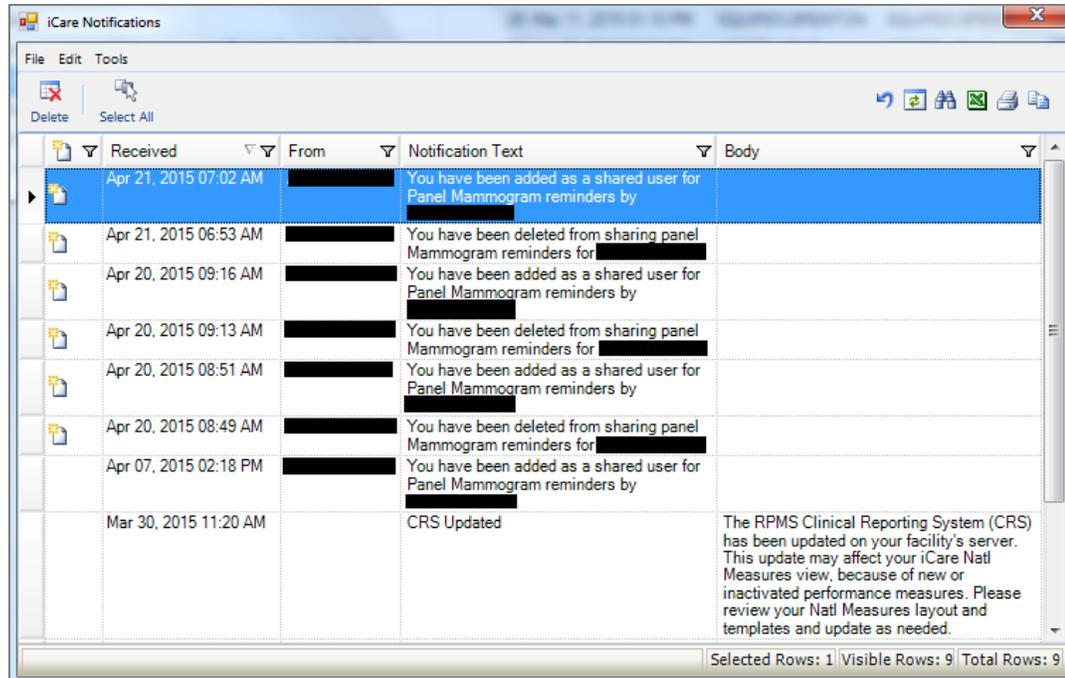


Figure 5-2: Sample **iCare Notification** for deleting a shared panel

If you are in the Delete Process and you clicked **Yes** and the selected panel is open in another window, the message in Figure 5-3 will display:

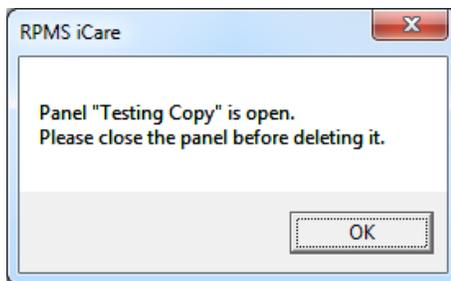


Figure 5-3: Warning message about a panel open in another window

Click **OK** to dismiss the warning and focus returns to the **Panel List** window. In order to delete the panel, you need to close it and then use the Delete process.

5.3.2 Delete Panel Shared with You

If you delete a panel that was shared with you, you will no longer see the panel on your list, i.e., the shared access is deleted but the panel remains for the panel creator and other shared users.

5.4 Repopulate

Use the **Repopulate** function when the patients in a selected panel need to be updated with new data (for example, some patients have moved). Repopulate reruns the panel definition against the cached data (from the nightly job) where it adds patients who meet the criteria and removes the patients that no longer meet the criteria.

You can repopulate the highlighted panel by doing one of the following:

- Clicking the **Repopulate** () button
- Selecting **File | Panel | Repopulate**
- Selecting the **Repopulate** option on the context menu
- Setting the **Auto Repopulate Options** under the panel modifications (use the **Modify** button)

The **Repopulate Panel** warning message displays asking if you want to update the patient list for the panel. Click **Yes** to repopulate the patient list. (Otherwise, click **No**.) This message does not display for Auto Repopulate.

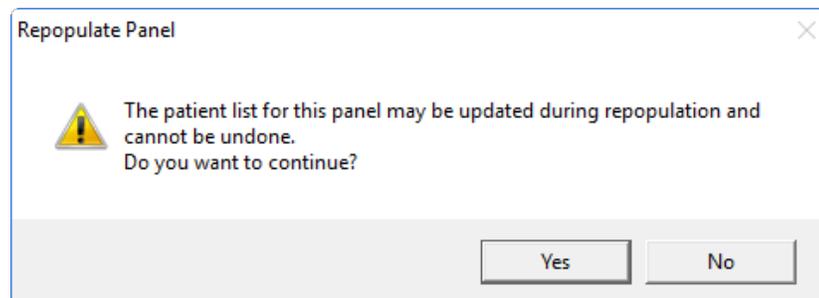


Figure 5-4: **Repopulate Panel** message

The repopulate process (cannot be undone) will run as a background operation.

The clock icon will appear to the left of the panel name while the process takes place; the date and time of the **Last Updated** column will be updated.

Panel List	Flag List	Community Alerts	Nat'l Measures	CMET	IPC
New Open Delete Repopulate Modify Share Copy Category					
Category	Panel Name	Panel Description	# of...	Last Updated	Last Updated By
	 Acarbose Meds		89	Apr 08, 2016 04:2...	
	Copy of Diabetes Test Script		3	Jan 05, 2016 04:...	
	Copy of Pregnant Patients		0	Apr 08, 2016 03:2...	

Figure 5-5: Example of **Panel List** during the repopulate process

5.4.1 Other Warning Message

If you manually edited (added or removed) patients in the panel, the **Maintain Manual Changes** warning message will display.

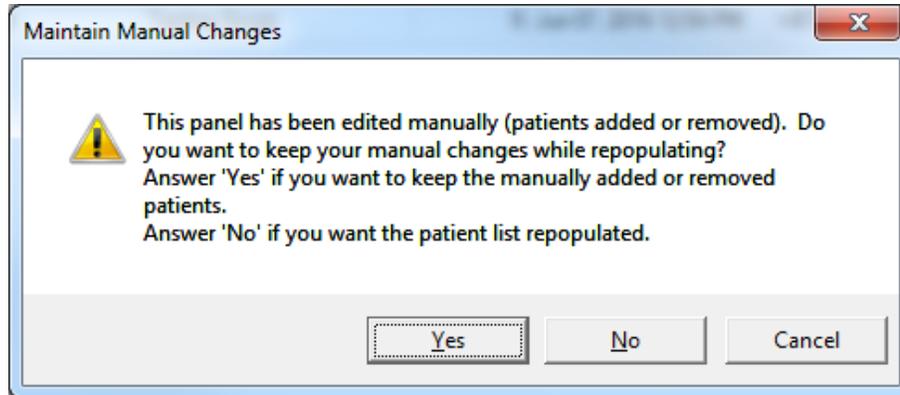


Figure 5-6: **Maintain Manual Changes** warning message

Click **Cancel** to exit the **Repopulate** function for the selected panel.

Click **No** if you want the patient list totally refreshed. In this case, any added patient names will be lost as well as any deleted patient names will be added back to the panel.

Click **Yes** if you want to preserve the manually added and removed patients. The **Background populate?** information message displays asking if you want to repopulate in the background. Click **Yes** if you want the repopulation to execute in the background. Otherwise, click **No** to repopulate in the foreground.

This process does not run for panels that are manually populated. If you try to run the repopulate process in this situation, the application displays a warning message that states: Panel is manually selected and cannot be repopulated. Please open the panel and add or remove patients as necessary. Click **OK** to dismiss the message.

5.4.2 Panel Open in Another Window

If you are in the Repopulate Process and you clicked **Yes** and the selected panel is open in another window, the warning message in Figure 5-7 will display.

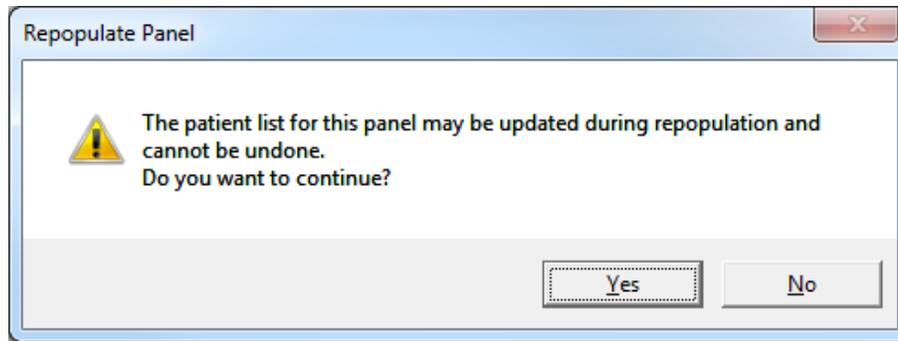


Figure 5-7: Warning Message about panel open in another window

Click **OK** to dismiss the warning and to exit the repopulate process.

5.4.3 Repopulate Not Active

You will not be able to repopulate a panel if your shared access is read-only. In this case:

- The **Repopulate** button will be inactive
- The **Repopulate** option on the context menu will be inactive
- The **Repopulate** option on **File | Panel** will be inactive

5.5 Modify

Use the **Modify** function to change the panel definition for a selected panel.

You can modify a highlighted panel by doing one of the following:

- Clicking the **Modify** () button
- Selecting **File | Panel | Modify**
- Selecting the **Modify** option on the context menu

If the selected panel is already open, a message stating the panel is already open will display.

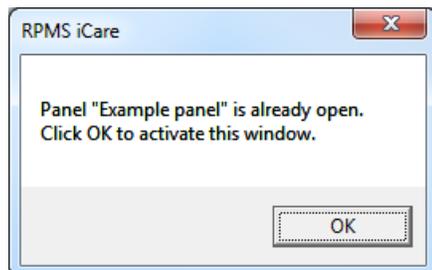


Figure 5-8: Panel already open message

Click **OK** and you move to the panel described in the message. You will modify the panel from this window.

When you select the **Modify** process, the **Panel Definition** window display show the population criteria.

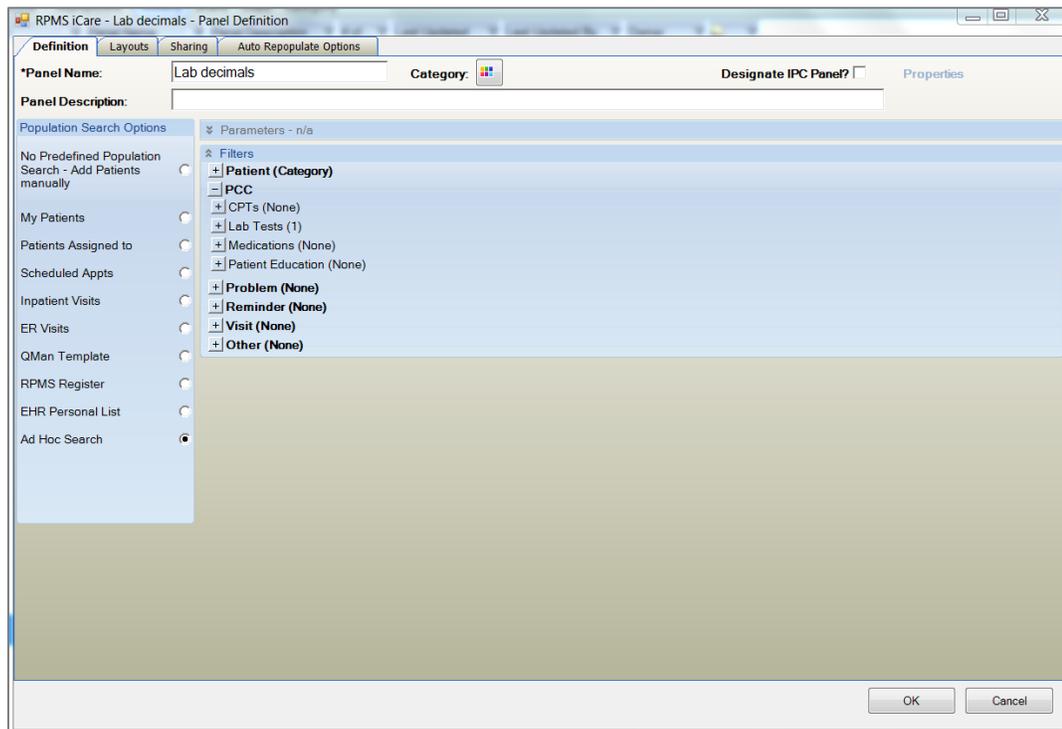


Figure 5-9: Sample Panel **Definition** window to modify

Below is an overview of the tabs on this window:

Definition: Used to specify the panel’s name and description as well as what criteria to use to populate the panel.

Layouts: Used to do two things: (1) select the layout for the “layout in use” for the Patient List, Reminders, Natl Measures, Care Mgmt groups, and CMET on the panel view tab and (2) the definition details for the defaults for the allergies, CPT, ER, inpatient, labs, medications, patient education, problems, and reminders on the panel view tab.

Sharing: Used to [share your panel](#) with RPMS users.

Auto Repopulate Options: Used to have your panel automatically refreshed.

5.6 Share

Use the **Share** function to define RPMS users who can share your panel.

You can share a highlighted panel by doing one of the following:

- Clicking the **Share** () button
- Selecting **File | Panel | Share**
- Selecting the **Share** option on the context menu

You will not be able to share a panel if your Share access is read-only. In this case:

- The **Share** button will be inactive
- The **Share** option on **File | Panel** will be inactive
- The **Share** option on the context menu will be inactive

After accessing the **Share** function, the **Panel List** window opens to the **Sharing** tab on the **Panel Definition** window.

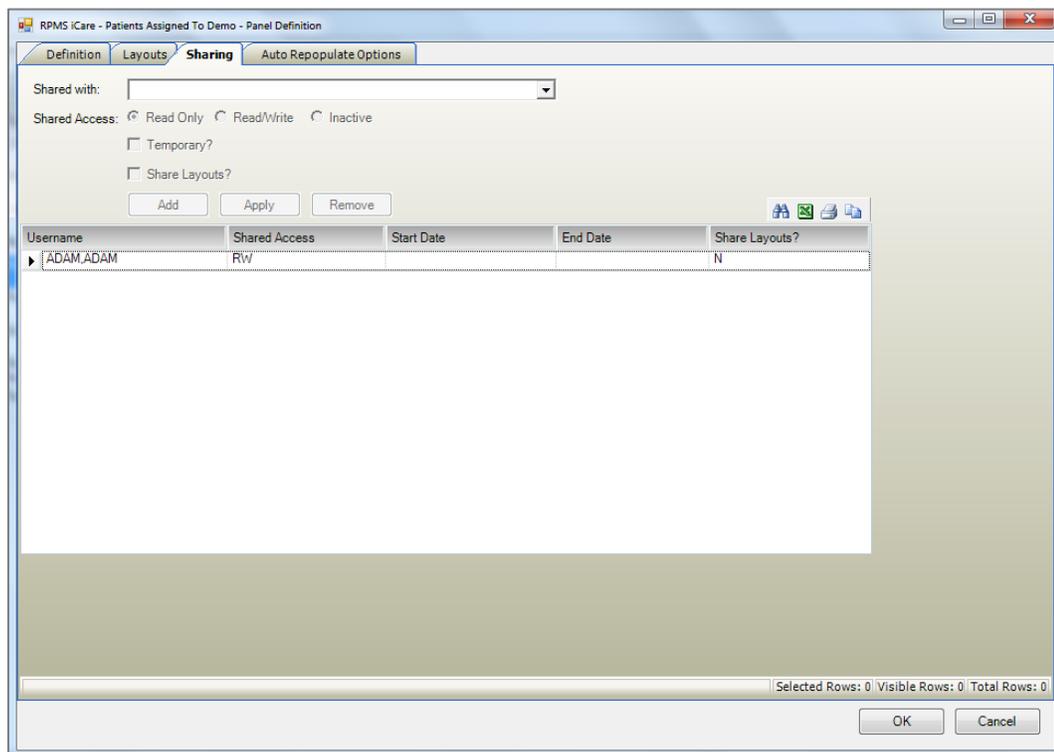


Figure 5-10: Sample **Sharing** tab on the **Panel Definition** window

When the **Sharing** tab is complete, click **OK** to save the Sharing information about the particular panel. (Otherwise, click **Cancel**.)

5.6.1 Fields on Sharing Tab

Shared with: Your selection from the drop-down list is the person with whom you want to share your panel.

Shared Access: The option buttons become active after you populate the **Shared with** field.



Figure 5-11: Sample **Shared With** and access rights

- **Read Only:** Use this option button to allow the person sharing your panel to only view your panel. The shared user can change the layout of the panel.
- **Read/Write:** Use this option button to allow the person sharing your panel to view and change your panel (for example, add or delete patients).
- **Inactive:** Use this option button to assign the person sharing your panel inactive access rights.

Temporary: Select the **Temporary** check box to display a date range for the temporary status of the shared user. The access rights will only apply during the specified data range and will automatically expire once the specified date range has passed.



Figure 5-12: Sample Temporary status

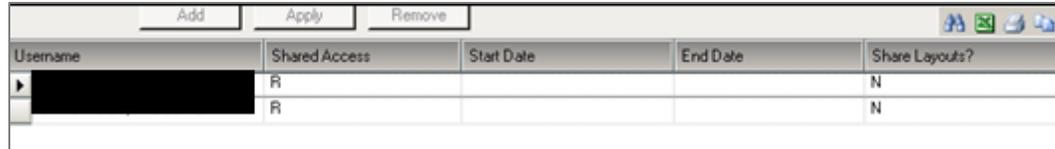
You must select a date range when using the **Temporary** status.

Shared Layouts?: Select the **Shared Layouts?** check box if you want to share the layouts of one or more of three panel views: Patient List, Reminders, and/or National Measures. The shared user will see the same layout modifications made by the creator.

- This causes the Shared Layouts cell (in the grid) to contain Y (for yes).
- The shared user will continue to be able to make modifications to the layouts of that shared panel. These modifications will not affect the creator's layouts.

5.6.2 Grid on Sharing Tab

The grid shows a history of the users (that have not been removed/deleted) with whom you have shared the current panel.



Username	Shared Access	Start Date	End Date	Share Layouts?
██████████	R			N
██████████	R			N

Figure 5-13: Shared user information in lower grid

Add: Click this button to add the information in the **Shared with**, **Shared Access**, **Temporary**, and **Shared Layouts** fields to the grid.

Apply: Click this button to change the **Shared Access and/or Temporary** status of a selected user in the grid. You can change the shared access rights; for example, change the access rights from Read Only to Read/Write.

Example: Highlight a user in the grid. The current access right (Read Only, Red/Write, Inactive) shows in the Shared Access area. Assume you want to change the selected user's Read Only access right to Read/Write. Select the **Read/Write** option button. Then click the **Apply** button to reflect the changes to the user in the grid.

Remove: Highlight one or more names in the grid and click this button to remove the name(s) from the grid. It might be more useful to inactivate the user instead of removing the user. After clicking the **Remove** button, the **Delete Row** information message displays, asking if you want to delete the selected names. Click **Yes** to delete (otherwise, click **No**).

5.7 Copy

Use the **Copy** function to create a new panel by copying one of your existing panels and saving it with a new name. What is copied is the patient population and the panel definition along with any added or deleted patients.

You can copy a highlighted panel by doing one of the following:

- Clicking the **Copy** () button
- Selecting **File | Panel | Copy**
- Selecting the **Copy** option on the context menu

The **Copy Panel** dialog displays.

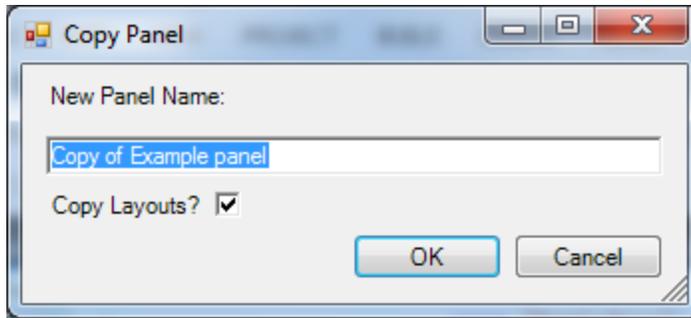


Figure 5-14: Sample **Copy Panel** dialog

The default name displays in the **Panel Name** field. You can edit the name.

The Panel Name [free text field](#) contains a context menu for editing the text.

The **Copy Layouts** check box determines if the layouts of the columns are in the copy process. The default is checked. If this field is not checked, the system default is used.

Click **OK** to have the new panel added to the **Panel List** view. (Otherwise, click **Cancel**.)

Once copied, you can modify the panel in any way, such as changing the panel definition, adding and deleting the patient names, etc.

If the entered name is a duplicate name, the **Panel Name is unique, please choose another name** warning message displays. Click **OK** to dismiss the message and you return to the **Copy Panel** dialog.

5.8 Category

Use the **Category** function to establish the category color for a selected panel.

- Click the **Category**  button
- Select **File | Panel | Category**
- Select the **Category** option on the context menu

The **Category Pick** dialog displays.

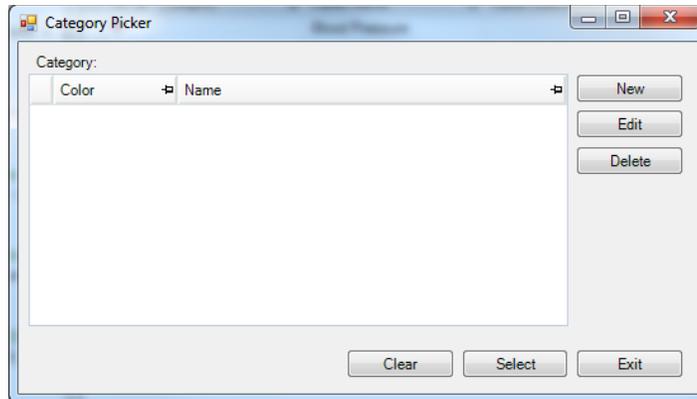


Figure 5-15: **Category Picker** dialog

Use the controls at the bottom as follows:

- Highlight a record in the grid and click **Select** to cause that color and name to display in the **Category** field on the **Panel List** window.
- Highlight a record in the grid and click **Clear** to cause that color to be removed by the **Category** field on the **Panel List** window. The **Clear Category** option on the context menu or on **File | Panel** does the same thing.
- Click **Exit** when the dialog is complete.

New

Click **New** to create a new category color and name. The application displays the **New Category** dialog.

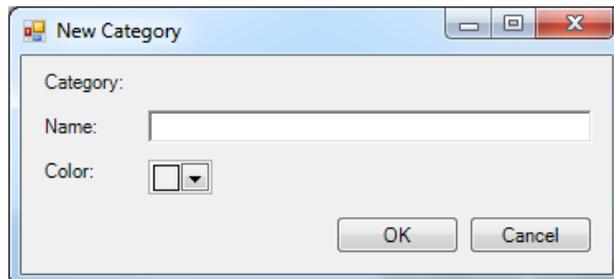


Figure 5-16: **New Category** dialog

Type the name of the new category in the **Name** free text field.

Click the down-down list for **Color** and pick a color to represent the new category.

When the dialog is complete, click **OK** and the new category will display in the grid on the **Category Picker** dialog. (Otherwise, click **Cancel**.)

Edit: Select a record in the grid on the **Category Picker** dialog and click **Edit** to display the **Edit Category** dialog. See **New** above to edit either field.

Delete: Select a record in the grid on the **Category Picker** dialog and click **Delete** to remove the record from the **Category Picker** dialog (there is no confirmation).

6.0 Panel List Menus

The **File**, **Tools**, and **View** menus for the **Panel List** window are reviewed below.

6.1 File Menu

Below are the options on the **File** menu.

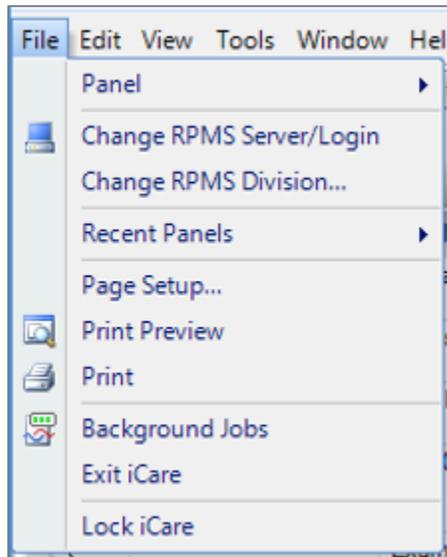


Figure 6-1: **File** menu options

Panel: The sub-menus contain the actions that you can take on this window. For example, the Properties option will display [Panel Properties](#) dialog that provides information about the panel such as the panel name, update history, shared users, and flag types. The Properties option is also available on the context menu.

Change RPMS Server/Login: The [Help Menu](#) allows you to change the server information and your access and verify codes to the iCare application on the iCare 2.8 GUI Login dialog.

Change RPMS Division: This option allows you 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 shows your recent panels that you accessed. If you select one, you can view the patients in the selected panel in a new window. The list of panels is the last five panels that you have viewed.

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

Print Preview: This option displays the [Print Preview dialog](#).

Print: This option sends the information about the selected rows in the grid to the printer using the settings in Page Setup.

Background Jobs: This option displays the **Background Jobs** dialog. This dialog displays, for example, the start and end dates for the nightly and weekly background jobs.

Exit iCare: The option allows you to leave the iCare application. You will be reminded to save any changed panels (if needed).

Lock iCare: This option locks the iCare application by displaying the iCare locked by user dialog. You can do two things on this dialog:

- Resume working on the iCare application by entering your verify code and then click **Resume**.
- Click **Logout** to exit the iCare application.

6.2 Tools Menu

Below are the options on the **Tools** menu.

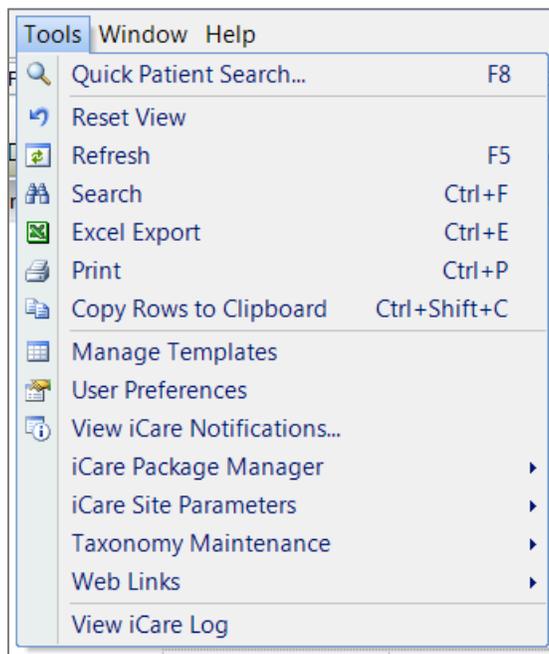


Figure 6-2: **Tools** menu options

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

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

Manage Templates: This option allows you to manage the templates for various parts of the application. Select this option to access the **Template Management** dialog. Section 3.9.7 provides information about managing templates.

User Preferences: This option opens the [User Preferences](#) window.

View iCare Notifications: This option opens the **iCare Notifications** dialog that provides information about various notifications that have been sent.

iCare Package Manager: This option is active for those users with Package Manager security key. Section 3.5 provides information about the iCare Package Manager Functions.

iCare Site Parameters: This option accesses several iCare site parameters.

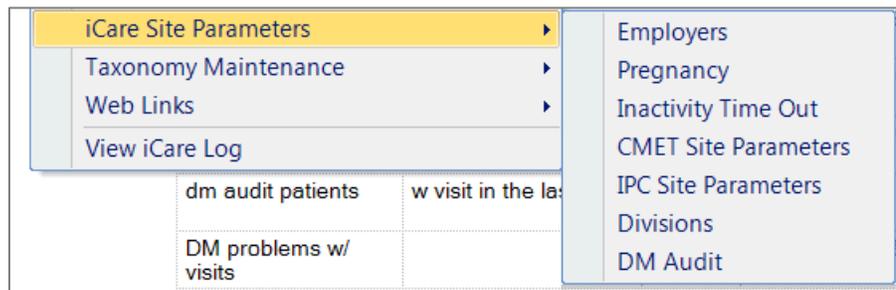


Figure 6-3: **iCare Site Parameters** options

The options provide dialogs where you can establish the various parameters. Section 3.9 provides information the iCare Site Parameter options.

Taxonomy Maintenance: This option is used by those users who can maintain taxonomies. Also, you use this option to view the taxonomy elements. This option has the following three features:

View/Edit Taxonomy Entries: This feature displays the **iCare Taxonomy View/Edit** dialog. Section 3.6 provides information about the iCare Taxonomy function.

Taxonomy User Access: [This feature](#) is active for those users with the proper security key. Selecting this option displays the **iCare Taxonomy User Access Management**

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

6.3 View Menu

The **View** menu on the iCare Main window provides a way to change between the Split View and tab view. If the **Split View** option is selected, a **Refresh** option is also displayed.

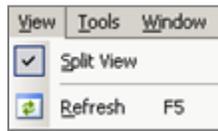


Figure 6-4: Sample View menu

Split View: Select **Split View** to have the current view in the split view with Panel List in the left pane and the other tabs in the right pane. You can change to the Panel List view by removing the check mark; this is a temporary setting. When you exit iCare and reopen iCare, the settings set under User Preferences for the default screen are used.

Refresh: Use this option to update any RPMS field values on the current window with new data from the server. This is the same as pressing F5 on your keyboard.

Appendix A: Rules of Behavior

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

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

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

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

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

A.1 All RPMS Users

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

A.1.1 Access

RPMS users shall

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not

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

A.1.2 Information Accessibility

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

RPMS users shall

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

A.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.

- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall

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

RPMS users shall not

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

A.1.5 Integrity

RPMS users shall

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

RPMS users shall not

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall

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

A.1.7 Passwords

RPMS users shall

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

RPMS users shall not

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

- Give a password out over the phone.

A.1.8 Backups

RPMS users shall

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

A.1.9 Reporting

RPMS users shall

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

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.

- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain, and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

Context Menu

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

Designated Primary Care Provider (DPCP)

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.

Panel List

The list of patient panels owned by the user.

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.

If you need a change or addition to an existing taxonomy, please see your 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	Meaning
CMET	Care Management Event Tracking
CQM	Clinical Quality Measures
CRS	Clinical Reporting System
DPCP	Designated Primary Care Provider
GPRA	Government Performance and Results Act
GUI	Graphical User Interface
HHS	Health and Human Services
ICD	International Classification of Diseases
IHS	Indian Health Service
IPC	Improving Patient Care
I/T/U	Indian Health Service, or Tribal or Urban Indian health programs
OIT	Office of Information Technology
PM	Performance Measures
RPMS	Resource and Patient Management System

Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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