



RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare Population Management GUI

(BQI)

Panel View User Manual

Version 2.8 September 2019

Office of Information Technology Division of Information Technology

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Preface

The purpose of this manual is to provide the information needed to use the latest enhancements to the Panel View window in the Indian Health Service (IHS) iCare (BQI) population management application.

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

1.0 Introduction

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

The information included in this Panel View specific manual covers iCare Panel View functionality in iCare Version 2.8.

2.0 System Navigation

2.1 Panel View

Every panel, when opened, has a Panel View. Each panel displays data about the patients in the selected panel. Access this window by using the **Open** function from the Main View or by double-clicking a record on a specific panel in the **Panel List** from Main View.



Figure 2-1: Sample Panel View window

Note: The **Repopulate** button will not display on the **Panel View** window if the patients in the panel were added manually (that is, the panel has no predefined logic).

Currently there are 11 tabs in Panel View.



Figure 2-2: Loading Data status

The application displays the loading progress (in percentage) in the status bar when the panel contains a large number of patients. This feature applies to all tabs except the **Rem Aggregated** (Reminder Aggregated) and the **Flags** tabs.

You can cancel the load by clicking **Cancel**; the application displays the **Cancel display of data?** dialog confirming that you want to cancel the loading process. Click **Yes** to cancel the load (otherwise, click **No**). iCare allows for more than one user to open the same shared panel simultaneously. The second and subsequent users to open the same panel will have read-only access to the panel content, similar to Word or Excel functionality. If the first user closes the panel, the second user will be notified that the panel is now available for edit access, unless the panel creator grants the user only Shared Read Only access.

Any tab, once opened, can be viewed without re-loading the data.

2.1.1 Toolbar Buttons

There are important toolbar buttons available for users.

Pa	tient Lis	Remin	ders Rem A	ggregate	ı٢	Natl Mea	sures I	Natl Aggr	egated	CMET Care Mg	imt Diagnostic Tags	Flags	Referrals	Consults
\$0	<u> </u>	×	\$		¥	1	P			2	-			
Add	Open	Remove	Repopulate	Сору	Cut	Paste	Modify	Share	Layout	Create Register	Update DPCP			

Figure 2-3: Toolbar buttons

2.1.1.1 Add

Note: You can add a patient to the current panel by using the Add function or by copying a patient from another panel and pasting the patient data into the current panel.

Only the panel creator or the shared user with read/write access can add patient names to the current panel. This is a manual add function. You can add a patient name even if the panel was originally created from a pre-defined search definition. The panel stores the original definition as well as any patients added. This is important during the repopulate action.

To add patients to the Panel View, do one of the following:

- Click the Add () button.
- Select Patients | Add Patient(s).
- Select the Add Patient(s) option on the context menu.

The Select Patients dialog (Figure 2-4) displays.

Patient Name HRN SSN DOB DOD Alias? DEMO,AMY N N N N N DEMO,BARABARA N N N N N DEMO,BRETT N N N N N DEMO,DANI N N N N N DEMO,DARLENE N N N N N DEMO,IMMUNIZATION BABY N N N N DEMO,JACKIE N N N N	Search: DEMO	Find					
DEMO,AMY N DEMO,BARABARA N DEMO,BRETT N DEMO,DANI N DEMO,DARLENE N DEMO,HAYDEN N DEMO,JACKIE N DEMO,JACKIE N	Patient Name	HRN	SSN	DOB	DOD	Alias?	1
DEMO,BARABARA N DEMO,BRETT N DEMO,DANI N DEMO,DARLENE N DEMO,HAYDEN N DEMO,IMMUNIZATION BABY N DEMO,JACKIE N DEMO,MARY N	DEMO,AMY					N	1
DEMO,BRETT N DEMO,DANI N DEMO,DARLENE N DEMO,HAYDEN N DEMO,IMMUNIZATION BABY N DEMO,JACKIE N	DEMO,BARABARA					N	1
DEMO, DANI N DEMO, DARLENE N DEMO, HAYDEN N DEMO, IMMUNIZATION BABY N DEMO, JACKIE N	DEMO,BRETT					N	
DEMO, DARLENE N DEMO, HAYDEN N DEMO, JIMMUNIZATION BABY N DEMO, JACKIE N DEMO, MARY N	DEMO,DANI					N	
DEMO,HAYDEN N DEMO,IMMUNIZATION BABY N DEMO,JACKIE N DEMO,MARY N	DEMO,DARLENE				**********************	N	14-9
DEMO,IMMUNIZATION BABY N DEMO,JACKIE N DEMO,MARY N	DEMO,HAYDEN				***********************	N	
DEMO,JACKIE N DEMO,MARY N	DEMO, IMMUNIZATION BABY					N	
DEMO,MARY N	DEMO,JACKIE					N	
	DEMO,MARY					N	

Figure 2-4: Select Patients dialog

- 1. Use any of the following to search for the patient in the Search field:
 - A few characters of the patient's last name
 - The patient's health record number (HRN)
 - The patient's social security number (SSN)
 - The patient's date of birth
- 2. Click Find. The retrieved records will display in the lower panel of the Select **Patients** dialog.
 - You can refine your search (if needed) by using the Search field again.
 - Use the Ctrl or Shift key to select and add multiple rows at the same time.
- 3. When you have highlighted the correct patients, click **Add** to add the patients to the **Patient List** tab on the **Panel View** window. (Otherwise, click **Close**.)

2.1.1.2 Open

The Open function moves the focus to another window where you can view the patient record (patient data information stored in the RPMS database).

Highlight the patient name and open the patient record by doing one of the following:

- Click the **Open** () button.
- Select Patients | Open Patient(s).

- Select the **Open Patient(s)** option on the context menu
- Double-click the row in the grid
- Press Ctrl-O.

Your default tab of the Patient Record window will display.

If selecting multiple rows, the multiple patient records will open in individual windows.

EPMS iCare - Visits in part 3 years - Panel View								
File Edit Patients Tools Window Help								Quick Patie
Visits in past 3 years Properties								PatientLis
Patient List Remindes Remingeregees	Nati Measures Nati Aggregated CMET Care Mgint Rener	THE CONSULS						
Add Open Remove Repopulate Copy C	RPMS Kare -							
♥ ♥♥ ♥ ♥♥ Patient Name	File Edit Tools Window Help	Quick Patient Search:	Active DX Tags V4	Active Insurance. 174	Last 3 Vis. 7-0	Last 3 Vis. 7 - 1	Last Prim. V 9	Last Prim. 70
	Name: HRNa: Community: Address:	Atlengies: No Allergy Assessme 📓 🍙 🧤			02/26/2019 12/28/2018 12/28/2018	BLUE CUNIC D GENERAL CUNIC CHART REVIEW	6232016	BAKER NP (GENERAL 01)
	SSN: Phone: 2 Sea: M Work Ph.: Age: 49 YPS Alt, Phone:	Barriera to Learning		COOPORTUNITY HEALTH: COOPPORTUNITY-RX	03/15/2019 11/18/2014 03/25/2014	BLUE CLINIC 1 WC GENERAL CHART REVIEW	1/18/2014	WC GENERAL (GENERAL 01)
	DOB: Email: P DPCP: P Addisonal Demographics Add a Note Wew	imm Proble	CKD 3 (P); DM (P); HTN (P)	MEDICARE A MEDICARE B. MEDICARE D. MEDICAID	05/10/2019 04/28/2014 04/28/2014	PRUIKSMA 0 DIABETIC CHART REVIEW PHARMACY_0	2/19/2014	WC GENERAL (GENERAL 01)
	Care Mont Referrais Consults DX Taps Family HX Cover Sheet Snapshot Flags Reminders BP Prompts	Notes Suidide Parm Nati Measures CMET Summ/Supp PCC Problem List	Aathma (P)	FORTIS INSURANCE COMPANY	03/13/2019 01/07/2016 04/07/2015	BLUE CLINIC 0	4/07/2015	(GENERAL 01)
	Recent Visits Inorth St 4 2x	- Insurance A			06/23/2016	ED WALK-IN BLUE CLINIC	0.01.000	ICTUTOR AN
	Date V Provider Narrative Clinic	Insurance Coverage V Blective V			06/21/1999 02/25/1999	ED TRADUCINE D	6/2/01/2/2/2	(GENERAL VI)
	due 03, 2019 GENERAL 01 due 03, 2019		Preg (P)	MEDICAID: RX-KANSAS MEDICAID	05/13/2019 03/05/2019 02/22/2019	BLUE CUNIC D BLUE CUNIC BLUE CUNIC	6/13/2019	BLUE CLINIC (GENERAL 01)
	Scheduled Appointments	- Panels		MEDICAID: UNICARE-RX	01/17/2019 08/16/2013 10/10/2012	ED WALK-IN 0 WC GENERAL WC GENERAL	8/16/2013	(GENERAL 01)
	1 month	Add to Panel 20 3 2	DM (P); HTN (P)		05/13/2019 12/16/1998 11/18/1998	PRUIKSMA 0 DIABETIC	9/18/1998	(GENERAL 01)
ADT.BARRY	Address and the second	Copy of Visita in past 3 years No ascut risk assess	ASCVD Risk (P): Obese (P)		0603/2019 11/12/2018 06/17/2016	BLUE CLINIC WC GENERAL GENERAL WIARD		
	Providens	Registers		RX-CAREMARK #004336	11/10/2014 11/07/2014	WELL CHILD 1 WC GENERAL WC GENERAL	1/10/2014	(GENERAL 01)
			DM (A)		06/17/2019 06/14/2019 04/13/2016	VIALKIN D PRUJIKSMA DIABETIC	4/13/2016	(GENERAL 01)
	F	DELIA	DM (P); HTN (P)		05/15/2019	PRUKSMA 1	0/21/2003	(GENERAL 01)

Figure 2-5: Open Patients dialog

2.1.1.3 Remove

The Remove function deletes one or more selected patients from the **Patient List** tab on the **Panel View** window. The removed patients are *not* deleted from the RPMS database but are only removed from your panel display. The Remove function is limited to the panel creator or the shared user with read/write access.

The panel stores the original definition as well as any patients removed or added. This is important during the repopulate action.

To remove selected patients, do one of the following:

- Click the **Remove** (Remove) button.
- Select Patients | Remove Patient(s).
- Select the **Remove Patient(s)** option on the context menu.
- Press Delete.

After using the Delete function, the **Confirm patient remove** dialog displays, asking if you want to delete the selected patients. Click **Yes** to remove them. (Otherwise, click **No**.)



Figure 2-6: Confirm patient remove dialog

2.1.1.4 Repopulate

The Repopulate function rebuilds the contents of the panel. This function reruns the panel definition against the cached data (from the nightly job), adding patients who meet the criteria and removing the patients who no longer meet the criteria. The Repopulate function is limited to the panel creator or the shared user with read/write access.

Note: The **Repopulate** button will not display on the Panel View if the patients in the panel were added manually (that is, the panel has no predefined logic).

To repopulate a panel, do one of the following:

- Click the **Repopulate** (**Repopulate**) button.
- Select Patients | Repopulate.
- Select the **Repopulate** option on the context menu.

A warning message displays that asks: "The patient list for this panel may be updated during repopulation and cannot be undone. Do you want to continue?" Click **Yes** to repopulate the panel. (Otherwise, click **No**.)



Figure 2-7: Repopulate Panel dialog

If you manually edited (added or removed) patients in the panel, the **Maintain Manual Changes** warning message displays that asks: "This panel has been edited manually (patients added or removed). Do you want to keep your manual change while repopulating?"



Figure 2-8: Maintain Manual Changes dialog

Click **Cancel** to cancel the repopulate process.

Click **Yes** to repopulate the panel and to keep the manually added or removed patients.

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

If you use Yes or No and the current panel contains many patients, iCare displays the **Background populate** information message that states: "Populating the panel may take some time. Do you want to run in the background?" Click **Yes** to run the repopulate process in the background. Otherwise, click **No** to repopulate in the foreground.

2.1.1.5 Copy

The Copy function copies the selected patient's information to the iCare clipboard. Then you can go to another panel view (for a different patient panel) and paste the patient's information. To copy the selected patient information, do one of the following:

- Click the **Copy** () button.
- Select Patients | Copy Patient(s).
- Select the **Copy Patient(s)** option on the context menu.
- Press Ctrl-C.

Use the **Select All** function to select all the patients on the current **Panel View** window. Once the patients are selected, you can copy-paste them into another panel, for example.

To select all the patients, do one of the following:

- Select Edit | Select All.
- Press Ctrl-A.

To deselect the patients, select the Deselect All option on the Edit menu.

2.1.1.6 Cut

The Cut function copies the selected patient's information to the iCare clipboard and removes the selected patient from the current Panel View. You can then go to another panel view (for a different patient panel) and paste the patient information. The Cut function is limited to the panel creator or the shared user with read/write access. This function is useful for moving patients from one panel to another.

To cut the selected patient information, do one of the following:

- Click the **Cut** () button
- Select Patients | Cut Patient(s)
- Select the Cut Patient(s) option on the context menu
- Press Ctrl-X.

Next, move to another patient panel and use the Paste function.

2.1.1.7 Paste

The Paste function places the contents of the iCare clipboard (containing patient data) into the current Panel View (this cannot duplicate patient data). If there are duplicate patients in the paste operation, the system displays a message about this condition. The Paste function is limited the panel creator or the shared user with read/write access.

Patients that are pasted into a panel are considered "manually added." This means that they are considered to be members of the panel that were manually selected to be on the patient list, and therefore are considered outside of the patient list that exists due to the panel's search logic.

To paste the contents of the iCare clipboard, do one of the following:

- Click the **Paste** () button.
- Select Patients | Paste Patient(s).
- Select the **Paste Patient(s)** option on the context menu.
- Press Ctrl-V.

The patients copied to the clipboard are added to the current Panel View. (If there are no patients on the iCare clipboard, a warning message will display.)



Figure 2-9: Unable to find patients to paste dialog

If there is a duplicate patient to be pasted, the **Duplicate patient** message displays that states: "The patient that is being pasted already exists in the panel. To avoid duplicate patients, this patient will not be pasted." Click **OK** to dismiss the message.



Figure 2-10: Duplicate patient dialog

2.1.1.8 Modify

The Modify function modifies the patient panel definition information. This function is limited to the panel creator or the shared user with Read/Write access.

To modify the current panel, do one of the following:

• Click the **Modify** (Modify) button.

• Select File | Modify.

The **Panel Definition** window for the panel displays.

2.1.1.9 Share

The Share function defines users who can share the current panel. This function is limited to the panel creator or the shared user with read/write access.

To share the patient panel, do one of the following:

- Click the Share (Share) button.
- Select File | Share.

The Panel Definition window opens to the Sharing tab.

2.1.1.10 Layout

The Layout function defines which data columns to show in the current panel, the order of the columns chosen for display, and the initial sort order of the patients in the list. This layout information is stored with the panel if you decide to save the panel changes. Users with read-only access can change the layout of a panel.

Select the view layout function by doing one of the following:

- Click the Layout () button.
- Select File | Layout.

The Patient List Layout window opens, showing the current panel layout.

Infants - Patient List Layout			A Martin	×
C Template: Patient Default	-	Customize This Panel	C System Default	
Available Columns:		Display Columns:	Italicized columns are required	
Patient	Add >	Patient Name HRN DOB Age Sex Community Last Visit Date Designated PCP Active DX Tags		Up Down
Available Sorts:		Sort Columns:		
Patient Community DOB HRN Patient Name Sex Other Patient Data Active DX Tags Designated PCP Visit Related Last Visit Date	Add >	Age DESC		Up Down Switch Sort Direction
			Reset OK	Cancel

Figure 2-11: Patient List Layout window

Section 4.3.2 provides information about using the various features on the layout window.

2.1.1.11 Create Register

The Create Register function adds the selected patients to the newly defined register. To create a register, do one of the following:

- Click the **Create Register** (Create Register) button.
- Select Patient | Create Register.

The Create Register window opens, showing the create register form.

2

Create Register				Х
Register				
Name:				
Description:				
-				
Patients to add to the the register:		1		
Patient Name	HRN	DOB	Sex	
▶ DEMO,AMY			F	
DEMO,BARABARA			F	
DEMO,BRETT			М	
DEMO,DANI			F	
DEMO, IMMUNIZATION BABY			F	
DEMO, JACKIE			F	
DEMO,MARY			F	
DEMO,MATIAS			М	
DEMO,MOTT			М	
DEMO,SOFIA			F	
			OK Cancel	l I

Figure 2-12: Patient List Create Register

2.1.1.12 Update DPCP

The Update DPCP function updates the selected patients with the newly selected provider. The user is required to have either DSPM Editor (BQIZDSPM) or Designated Specialty Provider Management System (BDPZMENU) security key. The message in Figure 2-13 will display if the user does not have one of these keys.



Figure 2-13: Insufficient Access Rights dialog

• Click the **Update DPCP** (Update DPCP) button.

Panel View User Manual September 2019 • Select Patient | Update DPCP.

The Update DPCP window opens, displaying the update provider form.

ſ	🖳 Update Designated PCP	- 0	×
	<u>Fi</u> le <u>H</u> elp		
	Add/Edit		
	Provider Name: {none}		
	ОК	Ca	ncel

Figure 2-14: Update Designated PCP window

2.1.2 Additional Toolbar Items

The buttons on the right side of any iCare window have many of the same functionality as the other views in iCare. For Panel View, there is one button that does not exist elsewhere in iCare: the **Mail Merge** button (Section 2.1.2.1).

Consults	
	= " Z A 🛛 🖨 🖬

Figure 2-15: Toolbar on the right side of the iCare window

These buttons might not be visible; in that case, click the list = button.

The application provides hover help for each button.

2.1.2.1 Mail Merge

The iCare application provides the capability to export patient demographic data in a format that can be used by word processing mail merge files. This is a Demographic Data Export for Letter Generation function.

Follow these steps:

- 1. Select the patients that you want to include in the mail merge process.
- 2. Click the Mail Merge () button (or select Tools | Mail Merge) to display the Mail Merge Export dialog.

D	Mail Merge Expo	rt						_ [] X
Ek	e Edit Looks							
In	structions						17 AS	8 3 %
	Name V-P	Address Line 1 V P	Address Line 2 🔽 🛱	Address Line 3 V 4	City 74	State 🛛 🕫	Zipcode 🛛 🕫	Home Phone
	ALPHA THETA	4 ST	and the second se		SPRINGFIELD	NC	11111	955 955 950
	BETA THETA	2 AVE			SPRINGFIELD	NC	11111	555-555-5555
	CHI THETA	5 AVE			SPRINGFIELD	NC	11111	555-555-5555
	GAMMA THETA	1 AVE			SPRINGFIELD	NC	11111	555-555-5555
_								

Figure 2-16: Sample Mail Merge Export dialog

Section 2.1.2 provides information about using the buttons on the right side of the toolbar.

3. Click the **Instructions** (**Instructions**) button to display the **Mail Merge Instructions** pop-up. The pop-up displays instructions for completing the mail-merge process.



Figure 2-17: Mail Merge Instructions pop-up

Print the contents by clicking the **Print** button or by selecting **File** | **Print**.

Section 4.1 provides information about the File menu and buttons on the pop-up.

2.1.2.2 Reset View

Click the **Reset View** () button (or select **Tools** | **Reset View**) to return the current view to the default view. Use this feature when changing the view, such as resizing the column width. This is the same pressing Ctrl-R.

2.1.2.3 Refresh

Click the **Refresh** (🔄) button (or select **Tools** | **Refresh**) to update any RPMS field values on the current window with new data from the server. This is the same as pressing F5.

2.1.2.4 Search

Search for data in the current grid by clicking the **Search** () button (or selecting **Tools** | **Search** or pressing Ctrl-F) to display the **Search** dialog.

🛃 Search			_ 🗆 🗵
Find What:		•	Find Next
Show A	dditional Search Options		Close

Figure 2-18: Search dialog

If you *do not* select the **Show Additional Search Options** check box, the search looks in all columns for a match.

If you select the **Show Additional Search Options** check box, the **Search** dialog displays additional search options.

Search			_0,
Find What:		•	Find Next
Show A	dditional Search Options		Close
Look In:	All columns	-	
Match	AnyPart01Field	•	

Figure 2-19: Search dialog with additional search options

Type the search criteria in the **Find What** Free Text field. The remaining fields determine the criteria for the search.

If you select the **Match Case** check box, that will cause the search to match the case of the text in the **Find What** field.

2.1.2.4.1 Look In Field

Click the list for the **Look In** field to view the field options. The selected option determines which part of the window to search.

Look In:	All columns	-
Match:	All columns Owner Panel Name	-
Search:	Panel Description	
	# of Pts DEF_LAST_UPDATED_BY PAT_LIST_UPDATED_BY	-

Figure 2-20: Look In field –list options example

The selection in the upper part of the list determines the options in the lower part of the list. For example, if the **Look In** field contains **All columns**, the list of the column names will display in the lower part of the list.

2.1.2.4.2 Match Field

Click the list for the **Match** field to view the field options.

Match:	AnyPartOfField
Search:	AnyPartOfField WholeField StartOfField

Figure 2-21: Match field – list options example

The selected option determines which part of the **Find What** field will be matched in the search.

2.1.2.4.3 Search Field

Click the list for the **Search** field to view the options for that field.

Search:	All	•
	Down	
	- Up All	

Figure 2-22: **Search** field –list options example

The selected option determines the direction of the search.

After all fields are populated with the search criteria, click the **Find Next** button. (Otherwise, click **Close**.)

If a match is found, the matching text will be highlighted (in the grid). If you want to continue the same search, click the **Find Next** button again; repeat this process as needed.

If a match is not found, the **Datagrid Search Results** message displays.



Figure 2-23: Datagrid Search Results dialog

Click **OK** to close the message and to return to the **Search** dialog.

2.1.2.5 Export to Excel

Export the information in the grid to Excel by clicking the **Export to Excel** (Solution (or selecting **Tools** | **Export to Excel** or pressing Ctrl-E).

The application displays a warning message about the export (Figure 2-24).

RPMS iCa	re 🔀
⚠	You are preparing to export confidential patient data from the RPMS server to a local computer. Please be aware of your site's policies about storing patient data.
	Do you wish to continue?
	<u>Y</u> es <u>N</u> o

Figure 2-24: Warning message about exporting patient data

- Click No to dismiss the warning and to exit the export process.
- Click Yes to continue the export process and display the Save As dialog.



Figure 2-25: Save As dialog

Ensure the location where you want to save the file displays in the Save in field.

Type the name in the **File name** field. The system will add XLS extension to the field name (automatically).

Click Save. (Otherwise, click Cancel.) If you click Save, the Export Panel message displays when the Save command is complete: "Excel export has been created." Click **OK** to dismiss the message.

When you view the Excel document, the application provides a Confidential Patient Information header in the document.

2.1.2.6 Print

The Print function will print the selected patient's information.

Copy the selected patient's information by doing one of the following:

• Select the patients by selecting the rows or select all by pressing Ctrl-A.

🔍 Print Preview				-		Х
ile View Tools						
Ø Ø Ø Ø Ø Ø Ø		6.40% 🔻	• 🕀 💾 🖽 •	Close 🖕		
M 🛯 1	M 🕤 🕑 💂					
^	CONFIDENTI	AL PATIENT INFORM/ Patient list for	ATION - [06/21/2019 12:51 F panet A1Cs	M] - (AA)		
	* vis *, vio Patenhame viv ANDERSON,MARYL	HRN Vie Sex Vie Age Vie 112602-DE F Seaves	DCR vio Communil, vio Designatel Marice, 1921 ACCRD, AL	Vio Community Vio ISL CNAHA	Active/DXTage DM(P)	
		TOSOSEDE F 74VRs	6427, 1947	D Galinar	БМ(Р); НТЙ (Р)	
	Deherkaredrit	34985 CB 7 F 7 7 7 34985	TAPS(1985"PROFIL" TABRENED	C NESCURIUNE	RTN (F)	
	KENELEPETE	Tosava-da "M" da vita" Tosava-HO	issyncia: basunar	RESERVE	ом (А;; Этк (Р)	
2	States Strict States	704548-55 "M" " 42 YRS 104539-HO	54934(3976 LONGWOLF	D NORTON	GW(P)	

Figure 2-26: Print Preview window

• Click the **Print** (

2.1.2.7 Copy

The Copy function copies the selected patient's information to the iCare clipboard. Then you can paste the patient's information from the clipboard.

Copy the selected patient's information by doing one of the following:

• Select the patients by selecting the rows or press Ctrl-A to select all.

• Click the **Copy** (⁽⁾) button

2.1.3 Additional Information

Information about the panel displays in different parts of the window.

	—	ð	×
Quick Patient Search:			0
	Total F	atients	= 1,288
PatientListLastUpdate	d: Dec 14,	2018 09	9:52 AM
	by		

Figure 2-27: Top right corner of the panel

- Total Patients: Number of patients in the panel.
- Patient List Last Updated: Date and time the Patient List was last repopulated, either manually or auto-repopulated.
- By: Displays the name of user who last repopulated the Patient List.



Figure 2-28: Bottom right corner of the panel

In the bottom right corner, the following displays:

- Current Layout
- Selected Rows
- Visible Rows
- Total Rows

RPMS iCare - A1Cs - Panel View	
File Edit Patients Tools Window Help	
A1Cs Properties Properties Patient List Reminders Rem Aggregated Natl Measures Natl Aggregated CMET Care Mgmt Diagnostic Tags	Flags Definition Details Referrals Consults

Figure 2-29: Upper left side of the panel

The upper left corner of the panel displays the panel name and the **Properties** button, which, when clicked, displays a description of the panel definition.

2.1.4 Properties

Click the **Properties** button located above the tabs in the Panel Information area (or select **File** | **Panel Properties**) to view the properties about the current panel. Click **OK** to dismiss the pop-up (Figure 2-30).



Figure 2-30: Sample Panel Properties pop-up

- The **General** tab provides information about the panel name, when the panel was created and by whom, the panel description, and any filters used to create the panel.
- The **Update History** tab provides information about the auto-repopulate status of the panel, when the panel definition was last modified and by whom, when the patient list was last populated and by whom, 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).

Click **OK** to dismiss the pop-up.

3.0 Package Management

3.1 Patient List Tab

The **Patient List** tab of the **Panel View** window displays data about the patients in the panel. The default grid displays the standard demographic columns (Name, HRN, Sex, Age, DOB) in addition to the Diagnostic Tag–related data and the condition-specific (register) fields.

e cuit	Patie	nts To	ols Wir	ndow H	elp															
emo Pi	s																			
Properti	es																			
D-11-1		1 2-1	index)	-		r	Maddate		r		restrict P	CHIET	Y		γ.	Viene and in Trans	These	Defend	7	
Patient	List	Ren	ninders	RemA	ggregated		Nati Me	asures	1	Nati Aggr	egated	CMET	Care	Mgmt	1	Diagnostic Tags	Flags	Referra	s C	onsuts
	9	×		2		*			5	1			2		. Iz	1				
dd Op	en	Remov	e Repo	opulate	Сору	Cut	Paste	Mo	dify	Share	Layout	Create	Registe	er U	pdate	DPCP				
* 7	ņ 🕈	77	Patient I	Vame	/ 7	-	HRN	7-1	Sex	7₽	Age ⊽≠	DOB	7-9	De	7-1	Community ▼≉	Active	DX Tags	70	
*			DEMO A	MY					F		3 YRS					ALBUQUERQUE				
1			DEMO.E	ARABAR	A				F		3 YRS					ALBUQUERQUE				
*			DEMO,E	RETT					М		4 YRS					ALBUQUERQUE				
10000			DEMO.D	ANI					F		3 YRS					ALBUQUERQUE				
1			DEMO.D	ARLENE					F		41 YRS					CORRALES				
			DEMO.H	AYDEN					М		41 YRS					HOLTON				
5			DEMO,II	MMUNIZ	ATION BAB	Y			F		3 YRS					ALBUQUERQUE				
			DEMO,J	ACKIE					F		3 YRS	Ť.				ALBUQUERQUE				
*			DEMO.N	MARY					F		3 YRS	-0-1				ALBUQUERQUE				
1			DEMO,N	ATIAS					М		4 YRS					ALBUQUERQUE				
É.			DEMO.N	TTOM					М		4 YRS					ALBUQUERQUE				
			DEMO.F	ATIENT					М		60 YRS					MAYETTA				
			DEMO S	OFIA					-		AVDC	-								
•			DEMO.3	DDUCL	ANE				5		4 153	-				HORTON				
			DEMO, I	REVISE	HIVE				M		20 185	1				HORION				
									м		50 YRS	3				MAYETTA	ASCVI	D Rick (P)		

Figure 3-1: Sample Patient List tab

3.1.1 Patient List Tab Layout

You can determine which template is being used by reviewing what is in the status bar, in Current Layout. For example, it could read Current Layout: System Default.

The status bar shows information about the rows in the panel. Visible rows will display a smaller number than Total Rows if a filter has been applied.

Selected Rows: 1	Visible Rows: 190	Total Rows: 190
------------------	-------------------	-----------------

Figure 3-2: Sample row information

You can sort, filter, and perform other functions on the columns.

Table 3-1 provides information about the default columns on the Patient List tab.

Column	Information
Flag indicator 🔻	Displays when a patient has a flag. This column is always the first column and can only be removed by turning all flags "off" in the User Preferences.
Feather indicator	The feather indicator in this column means that there is an open CMET with an overdue step. Go to the CMET Tracked Events sub- tab to review this condition.
Patient Name	Required field that will link to the Patient Record if you double-click the name.
HRN	Patient's health record number. The HRN will display as the HRN number followed by the facility code. An HRN with an asterisk (*) is an inactive HRN for that facility.
Sex	F (for female), M (for male) or U (for unknown).
Age	Patient's age as of today.
DOB	Patient's Date of Birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	One or more predefined diagnosis definitions ("tags") that iCare has proposed for the patient that has a Proposed or Active status. Section 3.1.1.1 provides more information about Diagnostic Tags.

 Table 3-1: Standard Patient demographic information

You can view the Community alert text by hovering your mouse over the Community Alert (k) icon, if any. The icon does not affect the sorting of the Community column.

3.1.1.1 Diagnostic Tags

iCare provides a diagnosis-tagging function that runs as a background process on your RPMS server and reviews all patient data. Tagging is a term that refers to running a series of logic algorithms on one or multiple patients that identifies ("tags") them with one or more predefined diagnosis categories, listed below.

- Asthma
- COPD
- Cardiovascular Disease (CVD) Known (CVD Kn)
- CVD At Highest Risk (CVD AHR)
- CVD At Significant Risk (CVD ASR)
- CVD At Risk (CVD AR)
- Diabetes (DM)
- HIV/AIDS (HIV)

- Hypertension (HTN)
- Obese
- Prediabetes/Metabolic Syndrome w/o DM (PreDM)
- Pregnant
- Current Smokers (Smoker)

iCare will classify tags into one of five statuses: proposed (pending) (P), accepted (A), not accepted (NA), No longer valid (NLV), and Superseded (S). In the Active DX Tags column on any Panel View, the status value should be concatenated with the tag name, e.g., Asthma (A); CVD AHR (P); DM (A).

The detailed logic for each of these diagnosis tags can be found in the Diagnostic Tag glossary (found by selecting that option on the **Tools** menu).

3.1.1.2 Patient Classified as Sensitive

You can identify a "sensitive patient" in the Patient Name column when the name is preceded by the (\Box) symbol.

When you double-click the sensitive patient record, and if one of the following conditions exists:

- If the patient is sensitive and the user is not a DG SENSITIVITY key holder *or*
- If the patient is an employee and the user is not a DG SENSITIVITY OFFICER key holder

Then, the application will display a warning message.

Confirm	open of sensitive patient record for: AD (1192	×
⚠	***WARNING*** ***RESTRICTED RECORD***	
	This record is protected by the Privacy Act of 1974 & Health Insurance Portability & Accountability Act of 1996. If you elect to proceed, you must prove you have a need to know. Access to this patient is tracked and your Security Officer will contact you for your justification.	
	Are you sure that you wish to proceed with opening this patient record?	
	Yes No	

Figure 3-3: Sample Sensitive Patient warning message

Click Yes to open the patient record. Otherwise, click No.

3.2 Reminders Tab

The **Reminders** tab displays reminders that are pulled from RPMS: Health Summary report reminders, EHR Clinical Reminders, HMS Reminders, CMET Reminders, and Immunization Forecaster Reminders. The default view is the Health Summary reminders.

RPMS iCare - Der	mo Pts - Panel View									
File Edit Reminder	rs Tools Window Help									
Demo Pts										
Properties										
Froperues			~							
Patient List R	eminders Rem Aggregated	Nati Measures	Natl Aggre	egated	CMET Care	Mgmt D	iagnostic Tags	Flags Referrals	Consults	
E a	· · · · · · · · · · · · · · · · · · ·									
Copy Patient(s) L	ayout									
Reminders data curr	ent as of: Jul 15, 2019 09:49 AM				_					
						Desi				
🖌 👗 🕹 👗	7 Patient Name 🗠 🗸 🕂	■ HRN 🛛 🖓 🗗	Sex ⊽+Þ	Age マ≁	DOB 🖓 🕈	gnat ed ⊽+⊐	Community ▽+	Active DX Tags 🛛 🗸	PRESSURE ▽中	
						PCP				
• 👻	DEMO,AMY		F	3 YRS			ALBUQUERQUE		1 Nov 27, 2017	
	DEMO, BARABARA		F	3 YRS			ALBUQUERQUE		🔥 Nov 22, 2017	
*	DEMO,BRETT		М	4 YRS			ALBUQUERQUE		A Oct 18, 2016	
	DEMO,DANI		F	3 YRS			ALBUQUERQUE		A Sep 23, 2017	
	DEMO, DARLENE		F	41 YRS			CORRALES		<u>1</u> Jun 14, 1980	
	DEMO, HAYDEN		М	41 YRS			HOLTON		NDA	
	DEMO, IMMUNIZATION BABY		F	3 YRS			ALBUQUERQUE		NDA	
	DEMO, JACKIE		F	3 YRS			ALBUQUERQUE		Nov 30, 2017	
•	DEMO, MARY		F	3 YRS			ALBUQUERQUE		Sep 23, 2017	
	DEMO, MATIAS		М	4 YRS			ALBUQUERQUE		Nov 22, 2016	
	DEMO,MOTT		Μ	4 YRS			ALBUQUERQUE		Aug 29, 2016	
	DEMO, PATIENT		М	60 YRS			MAYETTA		NDA	
*	DEMO,SOFIA		F	4 YRS			ALBUQUERQUE		t Oct 03, 2016	
	DEMO, TREVIS LANE		Μ	26 YRS			HORTON		A Oct 01, 1994	
			М	50 YRS			MAYETTA	ASCVD Risk (P)	1970 Dec 09, 1970	

Figure 3-4: Sample Reminders tab

The Reminders Glossary contains information about each of the Reminders. To view this glossary, select **Help** | **Reminders Glossary**.

3.2.1 Reminders Tab Layout

The default view displays the standard Patient demographic columns (see Figure 3-4) plus selected active Reminders.

Table 3-2: Sample Reminders tab

Column	Information
Individual Columns	There are individual columns for each active Reminder.

Double-click any row in the grid to access the **Reminders** tab of the **Patient Record** window.

3.2.1.1 Due/Overdue Dates

A date will display under each of the particular reminder's column if the test or procedure is currently due. A yellow triangle icon will display if the test or procedure is overdue, as shown below.



Figure 3-5: Sample overdue date for Pelvic Exam Reminder

3.2.1.2 Tooltip for Reminder

Hover your mouse over a reminder column heading to view information about it. The information is pulled from the Reminders application. The reminder tooltip will tell you what the type of the reminder is by the Source and Category.

	- Kan W 2018 A - 1 Kan
	DIABETES SCREENING
	Source: Health Summary Category: GENERAL Status: ACTIVE (ON)
HEP A,NOS Source: IZ Forecaster Category: Immunizations Status:	Diabetes Screening (blood glucose test) is due every 3 years for a patients starting at age 18 years who do NOT have a Problem Lis diagnosis of Diabetes. See Glossary for detailed definitions. Currently Defined Criteria in Use at this Facility: Sex: FEMALE Min. Age: 1Y Max. Age: 99Y Frequency: 1Y Sex: ALL GENDERS Min. Age: 12Y Max. Age: 99Y Frequency: 1Y

Figure 3-6: Reminder hover text

3.2.2 Reminders Tab Toolbar

The reminder logic is calculated and cached for display. The reminder logic is updated nightly by the nightly background job as well as once a week by the weekly job. The toolbar shows the date for which the data is effective.

Section 2.1.2 provides information about the buttons on right side of window of the toolbar.

3.2.3 Layout

The Layout function determines which reminder columns to display for the current panel as well as the order and sorting that should be used.

To change the layout, do one of the following:

- Click the Layout (
- Select **Reminders** | Layout.

The **Reminders Layout** screen will display for the current panel. Here you can select the **Reminders** columns to display on your panel.

- Infants - Reminders Layout				X
C Template: Reminders Default	Y	Customize This Panel Display Columns:	C System Default	auired
Patient	Add >	Patient Name HRM Sex Age DOB Community DENTAL EXAM Designated PCP Active DX Tags BLOOD PRESSURE BREAST EXAM DIABETES SCREENING HEIGHT HIV SCREENING DETUNG EXAM		E Up Down
Available Sorts: Health Summary GENERAL BLOOD PRESSURE BREAST EXAM DENTAL EXAM DIABETES SCREENING HEIGHT HIV SCREENING PELVIC EXAM PHYSICAL EXAM WEIGHT	Add > < < E •	Sort Columns: Patient Name ASC		Up Down Switch Sort Direction
			Reset	Cancel

Figure 3-7: Reminders Layout window

There are three ways to configure your display of data: Template, Customize, or System Default. Templates can be managed in Template Management. If you have multiple reminder type templates, you can choose the one appropriate for the panel. A template can be used over and over again for many different panels.

Template:	Reminders Default	•	O Custernize This Panel (O System Default
Available Columns:	dm reminders Im Forecaster		Display Columns	Italicized columns are required
 Patient Reminders 	Reminders Default	Add >	Patient Name HRN Sex Age	

Figure 3-8: Template Creation

Select **Customize** and the configuration is only valid for this panel. **System Default** is the standard view released with iCare.

You can update the Reminders columns by selecting **Reminders** and picking the appropriate source (on the **Reminders Layout** window) to add to the **Display Columns.** Section 4.3.2 provides information about manipulating the columns the layout.

3.2.3.1 Status of Background Jobs

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

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

The action accesses the **RPMS iCare - Background Jobs** window. Section 4.1.1 provides information this window.

3.3 REM Aggregated Tab

The **Reminders Aggregated** tab displays the percentages and counts of patients within a panel that have or have not met reminder criteria. Active reminders are reminders that are turned on at a site. The aggregated values of Reminders will be calculated at the time the view is opened.

Edit Tools Window	<u>H</u> elp							Quick Patient S	earch:		
ample panel							F	PatientListLa	stUpdate	To d: Mar	otal Patients = 09, 2016 01:18 by
Patient List Reminders Rem Aggregated Natl Measures Natl Aggregated CMET Care Mgmt Diagnostic Tags Flags Referrals Consu											
2									0) '') [• A 🛛 🌛
inders Aggregate data c	urrent as of: Mar 15, 2016	07:09 AM					_				
Source / 🗸	Category / 🏹	Reminder Name	₹ # I	Patients igible	7	# Patients Current	7	% Current 🛛	# Patients Overdue	7	% Overdue 🛛
EHR Clinical Reminders	Local	BP Elevated	8		20		0	0.0%		13	65.0%
		Dm Ace/Arb			2		0	0.0%		0	0.0%
		DM BP Control			3		0	0.0%		2	66.7%
		DM HgbA1C Elevated			3		0	0.0%		1	33.3%
	Hypertension Control (MH)	Hypertension Control (MH)			5		1	20.0%		3	60.0%
	No Allergy Assessment on F				25		18	72.0%		0	0.0%
	National	Tobacco Screen			25		1	4.0%		14	56.0%
		Tobacco Screen			25		1	4.0%		14	56.0%
Health Summary	BEHAVIORAL HEALTH	Alcohol Use Screening			21		0	0.0%		21	100.0%
		Depression Screening					0	0.0%		18	100.0%
		Domestic Violence/Ipv Screenin	ing		12		0	0.0%		12	100.0%
	CANCER-RELATED	Colorectal Ca-scope/Xray	1		5		0	0.0%		5	100.0%
		Mammogram			2		0	0.0%		2	100.0%
		Pap Smear		9			0	0.0%		8	88.9%
		Rectal		9			0	0.0%		9	100.0%
		Tobacco Use Screening			21		1	4.8%		20	95.2%
	CVD-RELATED	Cholesterol			6		1	16.7%		5	83.3%
	ELDER	Fall Risk Assessment			3		0	0.0%		3	100.0%
		Tonometry			9		0	0.0%		9	100.0%
		is a manufacture of the second s									

Figure 3-9: Sample Rem Aggregated tab

3.3.1 Rem Aggregated Tab Layout

The default view displays the fields on the **Reminders Aggregated** tab in the order shown in Table 3-3.

Column	Meaning						
Source	The name of the source for the reminder, The following reminders will be organized into Source: Asthma Reminders, CMET Reminders, EHR Clinical Reminders, Health Summary Reminders, HIV/AIDS Reminders.						
Category	The name of the category for the particular source.						
Reminder Name	The name of the reminder.						
# Patients Eligible	The total number of patients in this panel who need individual reminders.						
# Patients Current	"Current" is defined as any due date in the future (not including today).						
% Current	The total percentage of patients in this panel who are current for an individual reminder, that is, [# Patient Current] divided by [#Patients Eligible]. Because of the one-month grace period for the overdue definition, the total percentage of Current and Overdue cannot equal 100%.						

Table 3-3: Reminder Aggregated columns

Column	Meaning
# Patients Overdue	"Overdue" is defined as the due date equal or is before [today $-$ 30 days]. This means the reminder is not counted as overdue for purposes of performance until at least a month. The total of the Patients Current and the Patients Overdue cannot equal the total Patients Eligible because of the one-month grace period for the overdue definition.
% Overdue	The total percentage of patients in this panel who are overdue for an individual reminder. That is, [Patients Overdue] divided by [Patients Eligible]. Because of the one-month grace period, the total percentage of Patients Current and Patients Overdue might not equal 100%.

You can sort, filter, and perform other functions on the columns.

3.3.2 Rem Aggregated Tab Toolbar

The toolbar displays the date/time the data is effective.

Section 2.1.2 provides information about the buttons on the right side of the toolbar.

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

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

This action accesses the **RPMS iCare - Background Jobs** window. Section 4.1.1 provides information about this window.

3.4 Natl Measures Tab

The **Natl Measures** tab displays IHS national clinical performance measures as defined and reported in the RPMS Clinical Reporting System (CRS). iCare uses CRS performance logic to display whether your patients are meeting annual performance goals.

E F	RPMS	iCar	e - D	emo	Pts - Panel View																	
File	Edit	Na	tl Me	easure	es Tools Window Help																	
De	mo F	Pts																				
F	Proper Patie	rties nt Lis	: -	Rem	inders Rem Aggregated	NatiMea	sures	N	itl Aggre	egated	70	MET	Carel	Mgmt C	Diagnostic Tag	ă	Flags Referrals	5 (Consults			
Co	py Pa	tient	(s)	Layo	exercise data from CRS 2019) current ac	of Jul	12.2	019 02-	01 A M	-										_	
ITAU	v 7	7 p	N	Ύд	Patient Name / Y	HRN	⊽-₽	Sex	⊽₽	Age 1	7₽	DOB	⊽₽	Desi gnat ed PCP	Community	⊽₽	Active DX Tags	7₽	Alcohol Screen 9- 75	7₽	Alcohol Screen Females 14-46	7₽
•	7				DEMO,AMY			F		3 YR	S				ALBUQUER	QUE			N/A		N/A	
					DEMO, BARABARA			F		3 YRS	S				ALBUQUER	QUE			N/A		N/A	
	۲				DEMO.BRETT			М		4 YR	S				ALBUQUER	QUE			N/A		N/A	
					DEMO,DANI			F		3 YRS	S				ALBUQUER	QUE			N/A		N/A	
					DEMO, DARLENE			F		41 YF	RS				CORRALES	;			YES		YES	
					DEMO, HAYDEN			М		41 YF	RS				HOLTON				NDA		NDA	
					DEMO, IMMUNIZATION BABY	(1	F		3 YRS	5				ALBUQUER	QUE			NDA		NDA	
					DEMO, JACKIE			F		3 YRS	5				ALBUQUER	QUE			N/A		N/A	
	۲				DEMO,MARY			F		3 YRS	S				ALBUQUER	QUE			N/A		N/A	
					DEMO, MATIAS	-0.0	-	М		4 YRS	S				ALBUQUER	QUE			N/A		N/A	
					DEMO,MOTT		1 Journal	М		4 YRS	S				ALBUQUER	QUE			N/A		N/A	
					DEMO, PATIENT		-	М		60 YF	RS				MAYETTA				NDA		NDA	
-	*				DEMO,SOFIA			F		4 YRS	5				ALBUQUER	QUE			N/A		N/A	
					DEMO, TREVIS LANE		and the second sec	М		26 YF	RS				HORTON				NO		N/A	
								М		50 YF	RS				MAYETTA		ASCVD Risk (P)		NO		N/A	

Figure 3-10: Sample National Measures tab

3.4.1 What Is National Performance (GPRA)?

The Government Performance and Results Act (GPRA) requires federal agencies to report annually to Congress on how the agency measured up against the performance targets set in its annual Plan.

Most performance measures have a denominator and a numerator defined.

- The denominator is the total population being reviewed
- The numerator is the number of patients from the denominator who meet the definition of the measure.

Some measures are just a count, such as Sealants and Topical Fluorides.

Measure example: GPRA Measure Cancer Screening: Pap Smear Rates: Maintain the proportion of female patients ages 21 through 64 years without a documented history of hysterectomy who have had a Pap screen within the past three years at the previous year's level (60.0%).

The denominator is the total population that is being reviewed for a specific measure. For the Pap Smear measure, the denominator is all female patients ages 21 through 64 at the beginning of the Report period. The numerator is the number of patients in the denominator who meet specific criteria. For Pap Smear, the numerator is the number of patients in the denominator who had either a Pap smear, defined by certain codes, documented in RPMS any time in the three years prior to the end of the report period or a refusal of a Pap smear in the past year.

If you are not familiar with your facility's policies and practices related to national performance reporting, talk with your site GPRA coordinator.

3.4.2 Natl Measures Tab Layout

The default view displays the standard Patient Demographic columns (see Figure 3-1) plus the active National GPRA measures.

Column	Information
Individual Columns	The value of the performance met.

If you double-click any record in the grid, the patient record window opens to the Natl Measures tab.

There is hover help for each performance column that displays the GPRA definition.

You can find information about all of the measures in the National Measures Glossary by selecting **Help** | **Natl Measures Glossary**.

You can sort, filter, and perform other functions on the columns.

3.4.3 Natl Measures Tab Toolbar

The toolbar shows the date/time for which the data is effective.

Section 2.1.2 provides for more information about the buttons on the right side of the toolbar.

3.4.3.1 Layout

The Layout function determines which performance measures columns to display as well as the order and sorting that should be used in the current panel.

To change the layout, do one of the following:

• Click the Layout (
• Select National Measures | Layout

The Natl Measures Layout screen for the current panel will display.

🖳 Infants - Nati Measures Layout			×
C Template: Performance Default		Customize This Panel C System Default	view
Available Columns:	Add > Add >	Alsplay Columns: Italicized columns are required. Patient Name HRM Sex Sex Sex Sex Doental Access Designated PCP Active DX Tags Nochol Screen Females 15-44 Depression: Screening Only 18+ Depression: Screening Only 18+ Depression: Screening Only 18+ Community	Up Down
Available Sorts: STI: Prenatal HIV Screening Behavioral Health National GPPA Alcohol Screen Females 15-44 Depression: Screening Only 18+ Depression: Screening or Diagnosis IPV/DV Screen Females 15-40 Cancer-Related National GPPA	S Add > < Remove	iort Columns: Patient Name ASC	Up Down Switch Sort Direction
		Reset OK	Cancel

Figure 3-11: Natl Measures Layout window

If you choose to add the CRS Pop column (under **Patient** | **Demographics**) to the **National Measures** tab, it will display the value(s) describing the population category defined by CRS. The CRS Population categories include: UP (User Population), AC (Active Clinical), AD (Active Diabetic), etc. The population is a text string from the Denominator column of the CRS Patient List report that will be calculated for each patient within the weekly performance measures background process.

Section 4.3.2 provides information about using the features of the layout window.

3.4.3.2 Status of Background Jobs

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

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

This action accesses the **RPMS iCare - Background Jobs** window. Section 4.1.1 provides information about this window.

3.5 Natl Aggregated Tab

The National Aggregated tab information is based on the format of the Summary Page from the CRS National GPRA report. It displays a summarized overview of the national performance measure data for patients in the panel being viewed.

Edit Tools Window	v <u>H</u> elp				Qui	ck Patient Se	arch:	
mo Only Patients								Total Patients
roperties					Pa	tientListLa	st Updated: Jul	15,2016 10:25 by
Patient List Remin	ders Rem Aggrega	ated Natl Measures Natl Ag	gregated CME	T Care Mgmt	Diagnos	tic Tags F	lags Referrals	Consults
8							0 5	e # 🛛 🤿
ional Performance Mea	sures data from CRS	52016 current as of: Jul 09, 2016 0	3:57 AM					
Category / 🗸	Clinical Group / V	Measure Name / V	# Patients in Denominator ▼	# Patients in V Numerator	% Met ♥	2016 Goal ⊽	IHS Current National ▼ Performance	Healthy People 2020 T Goal
Developmental	Behavioral Health	Alcohol Screen: 12-75 (Dev)	0	0				
		Alcohol Screen: Positive: 12-75 (Dev)	0	0				
		Depression Screening, Diagnosis or Suicide Ideation: 12-18 (Dev)	0	0				
		Depression Screening, Diagnosis or Suicide Ideation: 18+ (Dev)	0	0				
		SBIRT	0	0				
	Cancer-Related	Comprehensive Cancer Screening (Dev)	0	0				
	Immunizations	Adult IZ: 1:1:1	0	0				
		Peds IZ: Hep A	0	0				
		Peds IZ: Influenza	0	0				
		Peds IZ: Rotavirus	0	0				
		Pregnant IZ: Influenza	0	0				
	Other Clinical	Hepatitis C Screening	0	0				
		Optometry (Dev)	0	0				
		Weight Assessment & Counseling (3-17)	3	0	0.0%			
		Astricht Assessment & Counseling	2	0	0.0%			

Figure 3-12: Sample Natl Aggregated tab

3.5.1 Natl Aggregated Tab Layout

The following data is displayed on the Natl Aggregated tab.

Table 3-5: Natl Aggregated columns

Column	Meaning
Category	The name of the category associated with the measure.
Clinical Group	The name of the clinical performance group.
Measure Name	The measure title derived from the Summary Report (iCare pulls from the first column of the CRS Summary Report). The hover help displays a description of the performance logic for each cell in the column.
# Patients in Denominator	The total number of patients in this panel who meet the denominator definition.
# Patients in Numerator	The total number of patients in this panel who meet the numerator definition.
% Met	The percentage of the panel who meet the measure, derived by dividing the denominator total by numerator total.

Package Management

Column	Meaning
<i>year</i> Goal	The value will be the same as the one that displays in the GPRA column on the Summary Page from the CRS National GPRA report. The <i>year</i> is the most recent year with final goals recorded.
IHS Current National Performance	The value will be the same as the one that displays in the Nat'l column on the Summary Page from the CRS National GPRA report.
Healthy People 2020 Goal	The value shows the 2020 goals detailed in CRS.

You can sort, filter, and perform other functions on the columns.

3.5.2 Natl Aggregated Tab Toolbar

The toolbar shows the date/time for which the data is current.

Section 2.1.2 provides more information about the buttons on the right side of the toolbar.

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

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

This action accesses the **RPMS iCare - Background Jobs** window. Section 4.1.1 provides information about this window.

3.6 CMET Tab

The **CMET** tab on the **Panel View** displays data related to the Events, Tracked Events, and Follow-up Events for the panel of patients. Please see the Care Management Event Tracking User Manual for details.



Figure 3-13: Sample **CMET** tabs

3.6.1 Events Sub-Tab

The **Events** sub-tab provides data that was last mined on the date displayed on this **Events** window.



Figure 3-14: Sample **Events** sub-tab

The following table provides information about the default columns.

Table 3-6: Default columns

Column	Meaning
Category	The category of the event: Breast, Cervical, Colon, Skeletal, STI.
Patient Name	Required field that will link to the Events sub-tab of the CMET tab on the Patient Record if you double-click on the name.
HRN	The patient's health record number.
Sex	F (for female) or M (for male).
Age	Patient's age today.
DOB	Patient's date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function.
Event Name	The name of the event.

Column	Meaning
Event Date	The date associated with the event.
Result	The date of the result of the event. This cell also has hover help, such as V Radiology.
Status	The status of the event.
Status Comments	Text of any comments about the status.
Last Modified Date/Time	The date and time the record was last modified.
Last Modified By	The name of the person who last modified the record. Initial job means it is the initial record.

Double-click the underlined Event Date to access the Visit Detail pop-up.

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

You can sort, filter, and perform other functions on the columns.

3.6.2 Events Sub-Tab Toolbar

The toolbar shows the date/time the data is effective.

Section 2.1.2 provides information about the buttons on the right side of the window.

3.6.2.1 Layout

The Layout function determines the columns on the **Events** sub-tab for the current panel.

To select the layout function, do one of the following:

- Click the Layout () button.
- Select File | Layout.
- Select CMET | Events | Layout.

This action accesses the **Events Layout** window.

C. Tamelata: Evanta Default		G. Custonias This De	ed C. Curters Default	
		Customize This Par	hel O System Default	
vailable Columns:		Display Columns:	Italicized columns are required	
Ð Patient	Add > < Remove	Category Patient Name HRN Sex Age DOB Community Designated PCP Active DX Tags Event Name Event Date Result Status Status Comments LearMatified Data To		Up Down
vailable Sorts: Events Last Modified By Last Modified Date/Time Result Status Status Comments Patient Demographics Age	Add >	Sort Columns: Category ASC Event Date DESC Patient Name ASC		Up Down Switch Sor Direction
DOR	*			

Figure 3-15: **Events Layout** window

Section 4.3.2 provides information about using the features of the layout window.

3.7 Tracked Events Sub-Tab

The CMET events that are identified as Tracked for the current panel will display on the **Tracked Events** sub-tab.



Figure 3-16: Sample Tracked Events sub-tab

3.7.1 Tracked Events Sub-Tab Layout

You can sort, filter, and perform other functions on the columns. Table 3-7 provides information about the columns.

Table 3-7: Columns

Column	Meaning
Category	The category of the tracked event: Breast, Cervical, Colon. Skeletal, STI.
Patient Name	Required field that will link to the Tracked Events sub-tab of the CMET tab on the Patient Record if you double-click on it.
HRN	Patient's health record number.
Sex	F (for female) or M (for male)
Age	Patient's age today.
DOB	Patient's date of birth.
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function.
1 - Event	Name of the event.
Event Date	The date associated with the event.
Preceding Event	Contains the date of the preceding event. Double-click on this underlined date to open the Tracked Events sub-tab of the CMET tab on the Patient Record. The chain of events in the same category is revealed. In addition, there is hover help when you move your mouse over the date (for example, PAP SMEAR 139).
Results	The date of the result of the event. Hover help will describe where the result came from (V-RADIOLOGY, V-LAB).
2 - Finding(s)	The icons indicate if the event has any findings.
Interpretation	The interpretation of the Finding.
3 - Follow-up(s)	The icon indicates if the event has follow-up data.
4 - Patient Notification(s)	The icon indicates if the event has any patient notification data.
State	The state of the tracked event (Open or Closed).

When the 2 - Finding(s) cell contains the following:

- The feather () icon indicates that the element is overdue; hover your mouse over the icon to view the Due Date (the tickler).
- The check () icon indicates that the step is complete; hover your mouse of the icon to view the Finding Due date and the Finding Value.
- Is blank indicates that the element is not complete but is not overdue.

When the 3 - Follow-up(s) cell contains the check (\checkmark) icon, the step is complete; hover your mouse of the icon to view the Follow-up Date and the Follow-up type. If it is blank, this indicates that element is not complete but is not overdue.

When the 4 - Patient Notification(s) cell contains the check (\checkmark) icon, the step is complete; hover your mouse of the icon to view the Notification Date and the Notification method. If it is blank, this indicates the element is not complete but is not overdue.

The Results column will display the date (Linked) if results have been mined during the nightly job. The data link will be the most recent result. Hover help will describe where the result came from, for example, V-LAB.

3.7.1.1 Layout

Use the Layout function to determine the columns on the **Tracked Events** sub-tab for the current panel.

To select the layout function, do one of the following:

- Click the Layout () button.
- Select File | Layout.
- Select CMET | Tracked Events | Layout.

This action accesses the Tracked Events Layout window.

BEMO Patient Panel - Tracked Events Layout			Patentinetter
C Template: Tracked Events Default	_	 Customize This Pan Display Columns: 	lel C System Default
Patient Tracked Events Closed Reason Event Comment Event Tracked By Event Tracked By Event Tracked Date/Time Finding Due By Date Finding Summary Follow-up Decision Due By Date Follow-up Decision Due By Date Follow-up Summary Last Modified By Last Modified By	Add >	Category Patient Name HRW Sex Age DOB Community Active DX Tags Designated PCP 1 - Event Event Date Preceding Event Results 2 - Finding(s)	Up Down
Active DX Tags Designated PCP Tracked Events 1 - Event 2 - Finding(s) 3 - Follow-up(s) 4 - Patient Notification(s) Interpretation Preceding Event Results State	Add > Add > < Remove	Category ASC Event Date DESC Patient Name ASC	Up Down Switch S Directio
			Reset OK Cancel

Figure 3-17: Tracked Events Layout window

Section 4.3.2 provides information about using the features of the layout window.

3.8 Follow-up Events Sub-Tab

The **Follow-up Events** sub-tab contains follow-up actions. The follow-up events are generated by the recommendation(s) made for the follow-up of the Tracked CMET event.

Properties											
Patient List	Reminders Re	m Aggregated	Natl Measures	Natl Aggregated CMET	Care Mgmt	Diagnostic	Tags Fl	ags Definit	tion Details Re	ferrals Consults	
Events Track	ed Events Fol	low-up Events									
Follow-up Events an	e generated by the	recommendation(:	s) made for the fol	low-up of a "Tracked" CMET (event. A CMET F	Reminder is als	o generateo	d by the same r	ecommendation(s)). Group Order may	be disabled by your Site i
Copy Patient(s)	Layout Open	CMET Worksheet Jul 15, 2019 02:09	B PM								
Category / V-P	Follow-up Event V-p Name	Follow- up Event ∇ ♥+ Date	Preceding V+P	Patient Name / V+	HRN 🖙 🕫	Sex ⊽+⊃	Age ⊽+Þ	DOB V+	Designated V-P	Community 🛛 🗢	Active DX Tags ♥+
BREAST	MAMMOGRAM	🚹 Jun 16, 2017	<u>Jun 17, 2015</u>			F	61 YRS			FALLS CITY	DM (A); HTN (P)
	MAMMOGRAM SCREENING	🚹 Mar 10, 20	Mar 11, 2015			F	60 YRS			LEONA	DM (A): HTN (P)
CERVICAL	COLPOSCOPY W/ BIOPSY	May 29, 20	Sep 15, 2014			F	48 YRS			FALLS CITY	DM (A): HTN (P)
LIVER	Hepatitis C Confirm	May 24, 20	Dec 27, 2018			М	60 YRS			UNKUMUTE	DM (A): HTN (P)

Figure 3-18: Sample Follow-up Events sub-tab

Panel View User Manual September 2019 The Follow-up Event Name and Date are pulled from step 3 of the CMET process. This is the provider's recommendation for follow-up. The date is the date due for the follow-up.

A CMET Reminder is also generated by the same recommendation(s).

3.8.1 Follow-up Events Sub-Tab Layout

The data on the Follow-up Events sub-tab is effective as of the date on the window.

The following table provides information about the columns.

Table 3-8: Sub-Tab columns

Column	Meaning
Category	The category for the Follow-up Event: Breast, Cervical, Colon, Skeletal.
Follow-up Event Name	The name of the event.
Follow-up Event Date	The follow-up date for the event.
Preceding Event	Contains the date of the preceding event. Double-click on this underlined date to open the Follow-up Events sub-tab of the CMET tab on the Patient Record. The chain of events in the same category is revealed.
Patient Name	Required field that will link to the Follow-up Events sub-tab of the CMET tab on the Patient Record if you double-click the name.
HRN	Patient's health record number.
Sex	F (for female) or M (for male)
Age	Patient's age today.
DOB	Patient's date of birth (required)
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.
Community	Patient's community of residence.
Active DX Tags	Predefined Diagnosis definitions ("tags") that iCare has proposed for this patient, based on the tagging function.

3.8.1.1 Layout

Use the Layout function to determine the columns on the Follow-up Events sub-tab for the current panel.

To select the layout function, do one of the following:

- Click the Layout (
- Select File | Layout.

• Select CMET | Follow-up Events | Layout.

This action accesses the Follow-up Events Layout window.

DEMO Patient Panel - Follow-up Events Layout			An owner of the local division of the local	×
Template: Followup Events Default Available Columns:	•	C Customize This Pane Display Columns:	el O System Default Italicized columns are required	,
□ Followup Events □ Ordered B Patient	Add > </td <td>Category Follow-up Event Name Follow-up Event Date Preceding Event <i>Patient Name</i> <i>HRN</i> Sex Age <i>DOB</i> Designated PCP Community Active DX Tags</td> <td></td> <td>Up Down</td>	Category Follow-up Event Name Follow-up Event Date Preceding Event <i>Patient Name</i> <i>HRN</i> Sex Age <i>DOB</i> Designated PCP Community Active DX Tags		Up Down
Available Sorts: Follow-up Event Name Preceding Event Demographics Age Community DOB HRN Sex Other Patient Data	Add > Add > < Remove	Sort Columns: Category ASC Follow-up Event Date D Patient Name ASC	ESC	Up Down Switch Sort Direction
Designated PCP	.		Reset OK	Cancel

Figure 3-19: Follow-up Events Layout window

Section 4.3.2 provides information about using the features of the layout window.

3.9 Care Mgmt Tab

The **Care Mgmt** tab displays data related to various groups of the patients in the panel.

RP	MSiC	are - D	emo l	Pts - Panel View																_
File 8	dit (Care N	Igmt	Tools Window Help																
Dem	o Pts	s																		
0	2 2 7 2 4																			
Pro	pertie	s																		
P	tient	List	Remi	inders Rem Aggregated	Natl Measures	Natl	Aggreg	ated (CMET	Carel	Igmt 🚺	Diagnost	tic Tags	Flags	Ret	ferrals	Consul	ts		
PL		Select	aGro	un: Immunizations	1															
	ase a	select	4010	ap. Juniterine terrer																
M	ain																			
	Da			a																
Com	Patie	ent(s)	Lavo	ut Reports																
cop.	- un	citic)	coyo	ar mpone														- 1		
	4	Р	Åå	Patient Name / V-P	HRN 7-12	Sex	7÷	Age ⊽+⊐	DOB	8-9	Designa	ted PCP	7-9 I	Community	₽ ₽	Active [)X Tags	7₽	Td-ADULT 7	7-Þ
۲				DEMO,AMY		F		3 YRS					· · · · ·	ALBUQUER	QUE					
				DEMO,BARABARA		F		3 YRS					1	ALBUQUER	QUE					
۲				DEMO,BRETT		M		YRS					1	ALBUQUER	QUE					
				DEMO, DANI		F	ŀ	3 YRS					'	ALBUQUER	QUE					
				DEMO, DARLENE		F	1	11 YRS					0	CORRALES						
				DEMO, HAYDEN		М		11 YRS						HOLTON						
				DEMO, IMMUNIZATION BABY		F		3 YRS						ALBUQUER	QUE					
				DEMO, JACKIE		F		YRS					,	ALBUQUER	QUE					
*				DEMO,MARY		F		YRS					,	ALBUQUER	QUE					
				DEMO, MATIAS		М	1	YRS					,	LBUQUER	QUE					
				DEMO,MOTT		М	1	YRS					,	ALBUQUER	QUE					
				DEMO, PATIENT		М	1	SO YRS						MAYETTA						
				DEMO SOEIA		F		YRS							OUE					
				DEMO TREVIS LANE		M		CYRS						HORTON	GOL					
				DENO, THE TO DATE										ion on						
						M		50 YRS						MAYETTA		ASCVD	Risk (P)			

Figure 3-20: Sample Care Mgmt tab

This tab displays information from the register (shown in the **Please Select a Group** field) for the patients in the panel. You must select an option for this field to view the data.

Please Select a Group:	-
Main Reminders	Asthma COPD
Ea	Diabetes
Copy Patient(s) Layout	Re Employee Health
🖗 🛆 ት 🖉 🕹	Hep C HIV/AIDS
	Immunizations 🔻

Figure 3-21: Various groups for the **Care Mgmt** tab

iCare provides you with specific underlying case management groups. The underlying RPMS application for the HIV/AIDS Register option is BKM.

3.9.1 Main Sub-Tab

The **Main** sub-tab displays specific information about the patients in the particular panel.

RPMS iCare - De	emo Pts - Panel View													
File Edit Care Mg	gmt Tools Window Help													
Demo Pts														
Properties														
Patient List	Reminders Rem Aggregated N	lati Measures	Natl Aggregated	CMET Care	e Mgmt Diagnostic	Tags Flags Re	ferrals Consults							
Please Select a	Group: COPD 💌													
Main													-	
Copy Patient(s)	Layout Accept Not Accept Pr	😜 🐣 opose Add T	ag Reports											
Y 79 💐	▼ Patient Name / ▼ P	HRN V+	Sex VI Age VI	DOB T	Designated PCP V	Community V 4	Active DX Tags	Dximetry VI	Spirometry V+	Pneumov	Tobacco	Tobaco	0. Ve	Active Inh
*	DEMO,AMY		F 3 YRS			ALBUQUERQUE				01/27/2016				NO
la l	DEMO, BARABARA		F 3 YRS			ALBUQUERQUE				NO				NO
*	DEMO.BRETT		M 4 YRS			ALBUQUERQUE				11/01/2015				NO
(L)	DEMO,DANI		F 3 YRS			ALBUQUERQUE				NO				NO
	DEMO, DARLENE		F 41 YRS			CORRALES				NO				NO
	DEMO, HAYDEN		M 41 YRS			HOLTON				NO		02/16/2 (EXPO: TO ENVIR TAL TO SMOKE	016 SURE DNMEN DBACCO	NO
	DEMO, IMMUNIZATION BABY		F 3 YRS			ALBUQUERQUE				02/29/2016				NO
81	DEMO, JACKIE		F 3 YRS		1	ALBUQUERQUE				NO				NO
*	DEMO,MARY		F 3 YRS			ALBUQUERQUE				NO				NO
21	DEMO,MATIAS		M 4 YRS			ALBUQUERQUE				11/22/2015				NO
	DEMO,MOTT		M 4 YRS			ALBUQUERQUE				NO				NO
	DEMO, PATIENT	1	M 60 YRS			MAYETTA								
*	DEMO,SOFIA		F 4 YRS			ALBUQUERQUE				10/03/2015				ND
	DEMO, TREVIS LANE		M 26 YRS			HORTON				NO				NO
			M 50 YRS			MAYETTA	ASCVD Risk (P)							

Figure 3-22: Sample Main Sub-Tab View for all groups

ile Edit Care Mi	amt Tools Window Help								
Demo Pts									
Desire 1									
Properties									
Patient List	Reminders Rem Aggregated	Natl Measures Nat	Aggregated CMET	Care Mgmt	Diagnostic Tags Flags	Referrals Con	sults		
Plaze Salact		1							
riease Select a	i i i i i i i i i i i i i i i i i i i								
Main Remin	ders								
63		😂 °- 1							
Copy Patient(s)	Layout Accept Not Accept	Propose Add Tag	Update Reports						
T ¥4 1	V Patient Name V P	HRN Y P Sex	Y P Age Y P DU	B Y P Design	Lated PCP Y P Community	Active UX Tag	gs Y H Regise	er Y 49	HIV FIOVI Y S
T		-	3 183			RQUE			
	DEMU, DARADARA	F	3103	2	ALDUGUE	RUUE			
	DEMO PRETT	5.4	AVPS		ALBUQUE	POLIE			
	DEMO,BRETT	M	4 YRS						
*	DEMO,BRETT DEMO,DANI DEMO,DARI ENE	M F	4 YRS 3 YRS 41 YRS		ALBUQUE ALBUQUE COBBALE	RQUE RQUE			
	DEMO,BRETT DEMO,DANI DEMO,DARLENE DEMO,HAYDEN	M F F	4 YRS 3 YRS 41 YRS 41 YRS		ALBUQUE ALBUQUE CORRALE HOLTON	RQUE RQUE S			
	DEMO,BRETT DEMO,DANI DEMO,DARLENE DEMO,HAYDEN DEMO,IMMUNIZATION BABY	M F M	4 YRS 3 YRS 41 YRS 41 YRS 3 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE	RQUE RQUE S			
	DEMO, BRETT DEMO, DANI DEMO, DARLENE DEMO, HAYDEN DEMO, IMMUNIZATION BABY DEMO, JACKIE	M F M F	4 YRS 3 YRS 41 YRS 41 YRS 3 YRS 3 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE	RQUE RQUE S RQUE RQUE			
	DEMO, BRETT DEMO, DANI DEMO, DARLENE DEMO, HAYDEN DEMO, JACKIE DEMO, JACKIE DEMO, JACKIE	M F M F F	4 YRS 3 YRS 41 YRS 41 YRS 3 YRS 3 YRS 3 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE	RQUE RQUE S RQUE RQUE RQUE			
	DEMO, BRETT DEMO, DANI DEMO, DANLENE DEMO, JARYDEN DEMO, JARYDEN DEMO, JACKIE DEMO, MARY DEMO, MARY	M F M F F M	4 YRS 3 YRS 41 YRS 41 YRS 3 YRS 3 YRS 3 YRS 4 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE	RQUE RQUE S RQUE RQUE RQUE RQUE			
	DEMO, BRETT DEMO, DANI DEMO, DANIENE DEMO, HAYDEN DEMO, IAMUNIZATION BABY DEMO, JACKIE DEMO, MARY DEMO, MARY DEMO, MATIAS DEMO, MOTT	M F F F F M M	4 YRS 3 YRS 41 YRS 41 YRS 3 YRS 3 YRS 3 YRS 4 YRS 4 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE ALBUQUE	RQUE RQUE S RQUE RQUE RQUE RQUE RQUE			
	DEMO, BRETT DEMO, DANI DEMO, DARLENE DEMO, HAYDEN DEMO, IMMUNIZATION BABY DEMO, JACKIE DEMO, MARY DEMO, MARTAS DEMO, MATTAS DEMO, PATIENT	M F F F F M M M	4 YRS 3 YRS 41 YRS 3 YRS 3 YRS 3 YRS 3 YRS 4 YRS 4 YRS 60 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE ALBUQUE MAYETTA	RQUE RQUE IS RQUE RQUE RQUE RQUE RQUE			
	DEMO, BRETT DEMO, DANI DEMO, DANLENE DEMO, HAYDEN DEMO, JACKIE DEMO, JACKIE DEMO, MATIAS DEMO, MATIAS DEMO, MOTT DEMO, SOEIA	M F F F F M M M	4 YRS 3 YRS 41 YRS 3 YRS 3 YRS 3 YRS 3 YRS 4 YRS 4 YRS 60 YRS 4 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE ALBUQUE MAYETTA ALBUQUE	RQUE RQUE S RQUE RQUE RQUE RQUE RQUE			
* * *	DEMO, BRETT DEMO, DANI DEMO, DANLENE DEMO, HAYDEN DEMO, HAYDEN DEMO, JACKIE DEMO, MARY DEMO, MATIAS DEMO, MOTT DEMO, PATIENT DEMO, SOFIA DEMO, SOFIA	M F F F F M M M F	4 YRS 3 YRS 41 YRS 3 YRS 3 YRS 3 YRS 3 YRS 4 YRS 4 YRS 60 YRS 4 YRS 26 YPS		ALBUQUE ALBUQUE CORPALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE ALBUQUE MAYETTA ALBUQUE HORTON	RQUE RQUE S RQUE RQUE RQUE RQUE RQUE RQUE			
Υ Υ Υ	DEMO, BRETT DEMO, DANI DEMO, DARLENE DEMO, HAYDEN DEMO, HAYDEN DEMO, JACKIE DEMO, MARY DEMO, MARY DEMO, MATIAS DEMO, MOTT DEMO, PATIENT DEMO, SOFIA DEMO, TREVIS LANE	M F F F F M M F M	4 YRS 3 YRS 41 YRS 3 YRS 3 YRS 3 YRS 3 YRS 4 YRS 4 YRS 60 YRS 4 YRS 26 YRS		ALBUQUE ALBUQUE CORRALE HOLTON ALBUQUE ALBUQUE ALBUQUE ALBUQUE MAYETTA ALBUQUE HORTON	RQUE RQUE S RQUE RQUE RQUE RQUE RQUE			

Figure 3-23: Sample Main Sub-Tab View for HIV/AIDS only

Note: The **Main** sub-tab displays for all groups. The Reminders sub-tab only displays for the HIV/AIDS group.

3.9.1.1 Main Sub-Tab Layout

The following table provides information about the default columns for the COPD, Diabetes, DM Audit, Employee Health, Hep C, HIV/AIDS, Immunizations, Pediatric, and Prenatal groups.

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The default view displays the standard Patient Demographic columns (see Figure 3-1) plus columns unique to each group.

Table 3-9: Patient Demographic columns

Column	Meaning
Remaining Columns	The group-specific columns — see Appendix A

You can sort, filter, and perform other column functions.

3.9.1.2 Main Sub-Tab Toolbar

Section 2.1.2 provides information about the buttons on the right side of the toolbar.

3.9.1.3 Copy Patient(s)

The Copy function copies the selected patient's information to the iCare clipboard. Then you can go to another panel view (for a different patient panel) and paste the patient's information.

3.9.1.4 Layout

Each Care Mgmt group has their specific columns for their **Layout**. Each group has its own default layout.

Click the **Layout** button (or select **Care Mgmt** | **Main** | **Layout**) to display the panel's layout of the columns.

Section 4.3.2 provides information about using the features of the layout window.

3.9.1.5 Change Status

Note: The Change Status buttons do not apply to Employee Health, Hep C, Immunizations, and Pediatric groups since there is no corresponding Diagnostic Tag.

Use the Accept, Not Accept, Proposed, and Add Tag buttons to change the Status on an existing record (or select Care Mgmt | Main).

Select the patient record whose status you want to change and click the appropriate **Change Status** button to display the **Update Diagnostic Tag** dialog.

🖳 Update Diagnostic T	ag	_		×
View Tag Activity				
Add/Update Diagnostic Tag	g			
Patient Name: Diagnostic Tag: Current Status:	Obese PROPOSED	-		
New Status:	ACCEPTED 👻			
Status Change Reason: Status Comment:	Patient Data Supports Act Manually Designated Other	ceptance		
View Tag Activity		ОК	Can	cel

Figure 3-24: Sample Update Diagnostic Tag dialog

All fields are required on this dialog.

The option buttons available for the Status Change Reason change according to the selection in the **New Status** field.

The Not Accept function cannot be performed on multiple patients or multiple tags.

Section 3.10.3 provides information about the fields and **View Tag Activity** button on this dialog.

3.9.1.6 Add Tag

Note: The **Add Tag** button does not apply to Employee Health, Hep C, Immunizations, and Pediatric groups since there is no corresponding Diagnostic Tag. Select a patient to whom you want to add a tag and click the Add Tag () button (or select Care Mgmt | Main | Add Tag) to display the Add Diagnostic Tag dialog. This is a manual add that allows a provider to manually assign one or more of the diagnosis tags to patients who did not meet the tag's criteria for being proposed automatically. Section 3.10.2.3 provides information about using the Add Tag button.

3.9.1.7 Update

Note: The **Update** button applies to the HIV/AIDS group only.

Batch-update register data for selected patients by clicking the **Update** () button (or by selecting **Care Mgmt** | **Main** | **Update**). The **Batch Update Data** dialog will display. Refer to the *HIV/AIDS Management User Manual* for more information.

3.9.1.8 Reports Button

Note: The **Reports** button applies to the HIV/AIDS group only.

Select one or more patients and click the list on **Reports** button to view the Quality of Care report (or select **Care Mgmt** | **Main** | **Reports**). The report scope is based on the patients that are members of a given panel.

Refer to the HIV/AIDS Management User Manual for more information.

3.9.2 Reminders Sub-Tab for HIV/AIDS Register

The **Reminders** sub-tab view displays the disease/register-specific reminders for the patient. Refer to the HIV Management System User Manual for more information.

3.10 Diagnostic Tags Tab

The **Diagnostic Tags** tab provides a comprehensive view of all tag history for a patient (regardless of the tag status), provides auto-accept and auto-reject capabilities, allows the user to accept a proposed tags for multiple patients, allows the user to reject proposed tags, and allows the user to update of tag status.

RPMS iCare - Copy of Visits Last Calendar Year - Panel View					
File Edit Diagnostic Tags Tools Window Help					
Copy of Visits Last Calendar Year					
Disputing					
Properues	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				
Patient List Reminders Rem Aggregated Nati Measures Nati Aggr	egated CMET Care Mgmt	Diagnostic Tags Fla	gs Referrals Consults		
🐚 🛛 🖉 🗙 🕲 🖕 🔍 📖					
Copy Patient(s) Accept Not Accept Propose Add Tag Activity					
Diagnostic Tags data current as of: Jul 13, 2019 02:01 AM					
Patient Name / V+P HRN V+P DOB V+P Age	▼+P Tag Name ▼⊀	Status V-P	Status Change Reason 7-P	Status Comment V-P Last Updated V-P	Last Updated By V+
57 Y	RS CVD At Risk	NO LONGER VALID	RPMS Data No Longer Supports Tag	Aug 30, 2016	CVD LOGIC UPDATE
	Asthma	PROPOSED	System Generated	Oct 08, 2018	SYSTEM UPDATE
46 Y	RS Asthma	PROPOSED	System Generated	Oct 10, 2018	SYSTEM UPDATE
55 Y	RS Obese	PROPOSED	System Generated	Feb 12, 2019	SYSTEM UPDATE
70 Y	RS Diabetes	PROPOSED	System Generated	Jul 12, 2009	SYSTEM UPDATE
	Handrada	80000550	5,110 C	6.4.12, 2000	CYCTEN LIDOATE
	Hypertension	PROPOSED	System Generated	Jul 12, 2009	STSTEM UPDATE
	Obese	NO LONGER VALID	RPMS Data No Longer Supports Tag	Feb 20, 2016	SYSTEM UPDATE
	CVD Highest Risk	NO LONGER VALID	RPMS Data No Longer Supports Tag	Aug 30, 2016	CVD LOGIC UPDATE
	Chronic Kidney Dis Stg 3	PROPOSED	System Generated	Sep 18, 2017	SYSTEM UPDATE
39 Y	RS Asthma	PROPOSED	System Generated	Jul 12, 2009	SYSTEM UPDATE
	Pregnant	NO LONGER VALID	RPMS Data No Longer Supports Tag	Jan 07, 2016	SYSTEM UPDATE
23 Y	RS Obese	NO LONGER VALID	RPMS Data No Longer Supports Tag	Jul 02, 2016	SYSTEM UPDATE
	Asthma	PROPOSED	System Generated	Dec 20, 2018	SYSTEM UPDATE
	Pregnant	PROPOSED	System Generated	Dec 20, 2018	SYSTEM UPDATE
68 Y	RS CVD At Risk	NO LONGER VALID	RPMS Data No Longer Supports Tag	Dec 12, 2012	SYSTEM UPDATE
46 Y	RS PreDM Metabolic Syndrome	PROPOSED	System Generated	Jul 12, 2009	SYSTEM UPDATE
	CVD Significant Risk	NO LONGER VALID	RPMS Data No Longer Supports Tag	Feb 27, 2013	SYSTEM UPDATE
	Obese	PROPOSED	System Generated	Dec 04, 2018	SYSTEM UPDATE
	ASCVD At Risk	PROPOSED	System Generated	Dec 04, 2018	SYSTEM UPDATE
54 Y	RS Asthma	PROPOSED	System Generated	Jul 12, 2009	SYSTEM UPDATE
	H. and and an	88080550	Sector Countred	64 12 2000	CYSTEM LIDDATE
	rypertension	PROPUSED	System Generated	301 12, 2009	STSTEM UPDATE

Figure 3-25: Sample **Diagnostic Tags** tab

Tags that are identified through iCare's execution of the pre-defined tag criteria will start with an initial tag status of PROPOSED. From there, you have several options including accepting a tag or not accepting the validity of a tag for any patient. You can edit these statuses from within this tab.

3.10.1 Diagnostic Tags Tab Layout

Table 3-10 provides information about the columns.

Table 3-10: Diagnostic tags

Column	Meaning
Patient Name	Required field that will link to the Patient Record if you double-click the name.
HRN	Patient's health record number.
DOB	Patient's Date of Birth.
Age	Patient's age.
Tag Name	The name of the tag for the patient.

Column	Meaning
Status	ACCEPTED: means the patient is a member of specified formal case management registers with status of Active, Decease, Transient, Non IHS, Lost to Follow Up, or Noncompliant. PROPOSED: means the patient has Status Un-reviewed or Inactive in the register. NO LONGER VALID: means the RPMS data no longer supports the tag. SUPERCEDED: means the level of the tag has gone to a higher level.
Status Change Reason	The reason the status changed can be: System Generated (system), RPMS Data No Longer Supports Tab (system), Patient Data Does Not Support Acceptance (user), Manually Designated (user), Other (user — with required comment field), on Existing RPMS Register (system).
Status Comment	The text of any comments entered about the status change (used with the Other status change reason).
Last Updated	The date the content 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 the user who either created or last repopulated the panel (in certain cases, it may contain the name of a process like SYSTEM UPDATE instead of a person).

There is hover help for the Tag Name cell that shows the name of the tag. Doubleclick any record to go the **Diagnostic Tags** tab of the **Patient Record** window.

You can find information about all of the tags in the **Diagnostic Tag Glossary** (select **Help** | **Diagnostic Tag Glossary**). You can sort, filter, and perform other functions on the columns.

3.10.2 Diagnostic Tags Toolbar

The toolbar shows the date/time for which the data is effective.

iCare will classify tags into one of five statuses: proposed (pending) (P), accepted (A), not accepted (NA), No longer valid (NLV) and Superseded (S). Those tags with a classification of NA will not display.

Section 2.1.2 provides information about the buttons on the right side of the toolbar.

3.10.2.1 Copy Patient(s)

This action copies the patient's information to the clipboard.

Select one or more patients and then do one of the following:

Click the Copy Patient(s) (Copy Patient(s)) button.

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- Select Diagnostic Tags | Copy Patient(s).
- Press Ctrl-C.

You must go to another panel view (for a different patient panel) and paste the patient's information.

3.10.2.2 Change Status

Use the Accept, Not Accept, and Proposed buttons to change the status on an existing record (or select Care Mgmt | Main). Section 3.9.1.5 provides information about using these buttons.

3.10.2.3 Add Tag

Select a patient to whom you want to add a tag and click the Add Tag () button (or select **Diagnostic Tags** | Add Tag) to display the Add **Diagnostic Tag** dialog. This is a manual add that allows a provider to manually assign one or more of the diagnosis tags to patients who did not meet the tag's criteria for being proposed automatically.

🖳 Add Diagnostic Tag	
View Tag Activity	
Add/Update Diagnostic Tag	
Patient Name:	DEMO,ALISTER LANE
Diagnostic Tag:	Asthma
New Status:	ACCEPTED
Status Change Reason:	Patient Data Supports Acceptance
	C Manually Designated
	C Other
Status Comment	
View Tag Activity	OK Cancel

Figure 3-26: Add Diagnostic Tag dialog

This dialog shows information about the patient named in the **Patient Name** field (the one you selected).

When you have completed the dialog, click **OK** to add the information to the **Diagnostic Tags** tab on the **Panel View**. (Otherwise, click **Cancel**.)

3.10.2.4 Tag Activity

You can view existing tag activity about the patient by clicking the **View Tag Activity** button. The **Diagnostic Tag Activity** pop-up displays. Section 3.10.3 provides more information about this pop-up.

3.10.2.5 Fields on Add Diagnosis Tag Dialog

All fields are required.

Patient Name: The name of the patient to whom to add tag information (application populated).

Diagnostic Tag: The name of diagnostic tag to add for the patient. Select an option from the list to populate this field.

New Status: The status of the tag being added.

- **ACCEPTED**: This option allows you to accept a proposed tag to provide affirmation of its validity for a given patient.
- **NOT ACCEPT**: This option allows you to disapprove or not accept a diagnostic tag that has been proposed for a patient.
- **PROPOSED**: This option allows you to change the status of a diagnosis tag back to Proposed so that further review can take place.

Reason: Click the appropriate reason for adding the tag.

- **Patient Data Supports Acceptance**: Use when the patient data does support the tag.
- **Manually Designated**: Use when you want to manually change the tag status.
- **Other**: Use when the other reasons do not apply.

Status Comment: Type the reason for the change in this Free Text field. This feature provides a rich audit history for reasons for providers' decisions to accept or not accept proposed tag assignments.

3.10.3 Activity

You can view existing tag activity about the selected patient by clicking the Activity

button on the Panel View toolbar (or by selecting **Diagnostic Tags** | Activity). The **RPMS iCare - Diagnostic Tag Activity** pop-up displays. This is a view-only pop-up. Multiple people can enter tags, so this pop-up shows all activity.

Properties									
Patient List Reminders	Rem Aggregated	Nati Measures Nati Aggrega	ted CMET Care Mgmt	Diagnostic Tags Flags	Referrais Consults				
Comu Patient(s) Accent N	A lot Accent Propose	Add Tag							
iagnostic Tags data current as	of Jul 13 2019 02:01 AM	Multing Multing							
RPMS iCare - Disconcitic Ta	an Activity					- n x	ment V-P	Last Updated V+	Last Updated By V+
a formatione - angliaste re	ag Activity					U /		Jun 23, 2010	SYSTEM UPDATE
Activity							1	Mar 18, 2011	SYSTEM UPDATE
Tag: All	Display Fa	ctor Details			0	n 🖬 🛤 🎒 🖬	,	Mar 14, 2013	SYSTEM UPDATE
Tag Name	/ Status	Last Updated V	Updated By Statue	s Change Reason	Status Comment		F	Feb 21, 2015	SYSTEM UPDATE
*CVD Highest Risk	NO LONGER VALID	Aug 30, 2016 02:30 PM	CVD LOGIC UPDATE RPMS	6 Data No Longer Supports Ta				Jul 12, 2009	SYSTEM UPDATE
And the second se	PROPOSED	Jul 12, 2009 08:01 PM	SYSTEM UPDATE Syste	m Generated				20 2010	EVETEM LIDDATE
ASCVD At Risk	PROPOSED	Apr 04, 2019 08:43 AM	SYSTEM UPDATE Syste	m Generated			1	Apr 29, 2010	STSTEM UPDATE
Diabetes	ACCEPTED	Feb 21, 2015 02:00 AM	SYSTEM UPDATE On E	kisting Register			4	Aug 30, 2016	CVD LOGIC UPDATE
1	PROPOSED	Jul 12, 2009 08:00 PM	SYSTEM UPDATE Syste	m Generated				May 20 2011	SYSTEM LIPDATE
Glaucoma	PROPOSED	Sep 18, 2017 02:01 PM	SYSTEM UPDATE Syste	m Generated				109 20, 2011	STOTEMOTORIE
Hypertension	PROPOSED	Jul 12, 2009 08:00 PM	SYSTEM UPDATE Syste	m Generated			5	Sep 18, 2017	SYSTEM UPDATE
Obese	NO LONGER VALID	Apr 29, 2010 01:01 AM	SYSTEM UPDATE RPMS	5 Data No Longer Supports Ta	9			Apr 04, 2019	SYSTEM UPDATE
	PROPOSED	Oct 31, 2009 01:00 AM	SYSTEM UPDATE Syste	m Generated					
	NO LONGER VALID	Sep 01, 2009 01:01 AM	SYSTEM UPDATE RPMS	5 Data No Longer Supports Ta	2		1	Nov 14, 2014	SYSTEM UPDATE
	PROPOSED	Jul 12, 2009 08:01 PM SYSTEM UPDATE		System Generated				Dec 12, 2012	SYSTEM UPDATE
Tobacco Users (Smokers)	NO LONGER VALID	May 20, 2011 01:02 AM	SYSTEM UPDATE RPMS	5 Data No Longer Supports Ta	2				
1	PROPOSED	Apr 29, 2010 01:01 AM	SYSTEM UPDATE Syste	System Generated				Dec 12, 2012	SYSTEM UPDATE
		LCA VPC	- Honordonalian	P2020250	Contem Concerted			11 12 2009	CYCTEM UDDATE
		64 TRS	CVD Significant Right	NOLONGERVAUD	PPMS Data No Longer Cur	contr Tag	-	Eab 27, 2009	SYSTEM UPDATE
			Obere	NO LONGER VALID	PPMS Data No Longer Sup	ports Tag		Sec 09 2011	SYSTEM UPDATE
		1 C C C C C C C C C C C C C C C C C C C	PreDM Metabolic Sundrome	NO LONGER VALID	RPMS Data No Longer Sup	porte Tag		May 21 2010	SYSTEM LIPDATE
		22 YRS	Diabetes	ACCEPTED	In Existing Register	house and		Feb 21 2015	SYSTEM UPDATE
		22 110			an analy registed				C.C.L. OF DATE
			CVD Highest Risk	NO LONGER VALID	RPMS Data No Longer Sup	ports Tag	4	Aug 30, 2016	CVD LOGIC UPDATE
			Pregnant	NO LONGER VALID	RPMS Data No Longer Sup	ports Tag	4	Apr 25, 2019	SYSTEM UPDATE
		70 YRS	CVD At Risk	NO LONGER VALID	RPMS Data No Longer Sup	ports Tag	1	Mar 14, 2013	SYSTEM UPDATE
		73 YBS	Hypertension	PROPOSED	System Generated			lul 12 2009	SYSTEM LIPDATE

Figure 3-27: Sample Diagnostic Tag Activity Pop-up

Section 2.1.2 provides information about the buttons on the right side of the toolbar.

Click the **Glossary** (¹²⁾) button to display the Diagnostic Tag Glossary.

You can sort, filter, and perform other functions on the columns. You can view various tags by selecting from the **Tag** field list.

If you select the **Display Factor Details** check box, the following columns will display: Factor, Date, Item, Value. This allows you to view additional details about the tags. The default view is unchecked. You must dismiss the pop-up.

3.11 Flags Tab

The Flags tab of the Panel View displays the flags for the patients in the open panel.

Properties								
Patient List Reminders Rem Aggregated Nati Measures Nati Aggregated CMET Care Mgmt Diagnostic Tags Flags Referrals Consults								
Hide Show Active Flags 💽								
Flag data current as of: Jul 15, 2019 11:30 AM Flag Setup=Ab. Lab:1 month, ER:1 month, ER Return:1 m	onth, Hosp. Admit:1 month							
Flag Date V Patient Name / V HRN V	7 Sex 🛛 Age 🏹 DOB 🛛 🏹	Flag Type 🛛 🖓 Fla	ag Description / V Designated PCP V					
Jul 15, 2019	M 46 YRS	ABNORMAL LAB CR	REATININE-DEHR 3.40					
	M 46 YRS	ABNORMAL LAB GL	UCOSE (R) MSU 240					
	M 46 YRS	ABNORMAL LAB HA	ATC-DEHR 9.2 H					
Jul 14, 2019	M 8 YRS	EMERGENCY ROOM VISIT Pro	ovider IVs: 1)Encounter for exam and observation following oth accident					
Jul 10, 2019	F 31 YRS	HOSPITAL ADMISSION Pro	ovider: / DVs:					

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

The Flags tab displays the flag type shown in the Show field.

You can change the default flag display by changing the flag settings under User Preferences.

Double-click any record on this tab to go to the **Flags** tab of the **Patient Record** window.

3.11.1 Flags Tab Layout

The default display has the flag listed alphabetically by flag date (most recent first), by patient name, and then by flag type. No duplicate values display in the first column. This means if a particular date has more than one flag, the date will display only in the first row.

The iCare application will display an initial list of flags at first login only for the timeframe that is defined in the User Preferences. Likewise, you can change the flag view to display modified flag types and/or timeframes if you change the User Preferences. After changing the flag settings in User Preferences, refresh the flag view.

You can sort, filter, and perform other functions on the columns.

Table 3-11 provides information about the columns.

Table 3-11: Flags tab

Column	Meaning
Flag Date	The date the flag became active, e.g., the date of the hospital admission.
Patient Name	This is a required field and will link to the patient's Patient Record if you double-click the name.
HRN	Patient's health record number.
Sex	Either F (for Female) or M (for Male)

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Column	Meaning					
Age	Patient's age.					
DOB	Patient's date of birth.					
Flag Type	This can be Abnormal Lab Values, ER Visit, Unanticipated ER Return Visit, and Hospital Visit.					
Flag Description	A brief description of the event that caused the trigger.					
Designated PCP	Designated Primary Care Provider, if any. Not all facilities use this field to empanel patients.					

The Flag Type column contains various flag types, as defined in the following table:

Table 3-12: Flag types

Flag Type	Meaning
Abnormal Lab Values Alert	This flag type informs the user when a patient has abnormal lab values within a user-defined timeframe, based on the Kernel Alerts component. The Abnormal Lab Values alerts, generated from the RPMS Laboratory application, reside in the Kernel Alerts component. If the ALV alert is closed by the provider in Kernel Alerts, it will no longer display in iCare, regardless of the Flag Display Timeframe selected by the user in the User Preferences.
ER Visit	This flag type informs the user when a patient has an emergency room visit within a user-defined timeframe. This flag is generated directly by iCare. ER visits (clinic code 30) is the trigger for this flag.
Unanticipated ER Return Visit	This flag type informs the user when a patient has an emergency room visit designated as unanticipated within a user-defined timeframe. This flag is generated directly by iCare. ER visits (clinic code 30) with Visit Type "Unscheduled Revisit" is the trigger for this flag.
Hospital Admission	This flag type informs the user when a patient has a hospital visit within a user-defined timeframe. This flag is generated directly by iCare. Any visit with service category H where the discharge date is not the same day as the admission date is the trigger for this flag.

3.11.2 Flags Tab Toolbar

The text above the grid shows the flag set-up information and how current the data is.

3.11.2.1 Show Field

Which flags display on this window is determined by the option selected on the **Show** field. The choices are as follows:

- Active Flags: Active is defined as a flag that has not expired and has not been hidden by the users.
- Hidden Flags: Those flags that you specified to be hidden, using the Hide button.

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• All Flags: All flags, hidden as well as active.

3.11.2.2 Hide

To hide a selected row in the Flag List grid, do any of the following:

- Click the **Hide** (Hide) button.
- Select File | Flags | Hide.
- Select the **Hide** option on the context menu.
- Press F3.

You can view the hidden flags by selecting the **Hidden Flags** option on the **Show** field.

3.11.2.3 Show

If you need to re-display a hidden flag in the current view, select it from the list on the **Hidden Flags** option (from the **Show** field) and do any of the following:

- Click the **Show** () button.
- Select File | Flags | Show.
- Select the **Show** option on the context menu.
- Press F4.

3.11.2.4 Status of Background Jobs

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

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

This action accesses the **RPMS iCare - Background Jobs** window. Section 4.1.1 provides information this window.

3.11.3 Flags Tab Menu Options

The options on **File** and **Tools** menus are the same those on the **Patient List** tab. Section 4.0 provides more information about these menus.

The **Flags** menu is only available when the **Flags** tab is selected. The **Hide and Show** options work like the **Hide and Show** action buttons. The **Refresh** option refreshes the flags display to show the most recent changes.

3.12 Referrals Tab

The **Referrals** tab displays referral data for the panel of patients.

Properties														
Patient List	Reminders	Rem Aggregated	Natl Measures	Natl Agg	regated	CME	T Care	Mgmt	Diagnostic Tags	Flags	Referrals	Consults		
D														
Copy Patient(s)	Layout													
Referrals for the	dates of Jan 1	5, 2012 - Jul 15, 2019										(((
🕈 🛆 🕹	v 7 Patien	t Name	∕ ⊽ -₽	HRN ⊽¢	Sex	⊽₽	Age⊽⇔	DOB 7	PCP	7.₽	Community 🗸 🕯	Active DX Tags ⊽ ≠	Referral ⊽ ≉ Date ⊽ ≉	Referral # ▼≠
•					М		57 YRS				HASKELL INST	Asthma (P)		
					F		46 YRS				HORTON	Asthma (P)		
	(F		55 YRS				HASKELL INST	Obese (P)		
					F		70 YRS				PAPILLION	CKD 3 (P); DM (P); HTN (P)		
	1				F		39 YRS				HORTON	Asthma (P)		
					F		23 YRS				UNKUMUTE	Asthma (P); Preg (P)		
					F		68 YRS				TOPEKA			
*					М		46 YRS				TOPEKA	ASCVD Risk (P); Obese (P); PreDM (P)		
					м		54 YRS				ATCHISON	Asthma (P); HIV (A); HTN (P)	Dec 26, 2018	
					F		69 YRS				HORTON			
-	······				F		74 YRS				DELIA	DM (P): HTN (P)		
-					F		72 YRS				MAYETTA			
					F		98 YRS				OMAHA	DM (P)		
					F		55 YRS				WHITE CLOUD	Asthma (P)		
					М		63 YRS				CIRCLEVILLE	DM (P): HTN (P)		
					F		73 YRS				MAYETTA	ASCVD Risk (P); DM (P); HTN (P)		
					F		34 YRS				HIAWATHA	Asthma (P)		
					F		77 YRS				ТОРЕКА			

Figure 3-29: Sample Referrals tab

3.12.1 Referrals Tab Layout

The default view displays the standard Patient Demographic columns (see Figure 3-1) plus specific Referral columns.

Table 3-13: Referrals tab

Column	Information
Individual Columns	There are individual columns for each Referral.

Double-click any row in the grid to access the **Referrals** tab of the **Patient Record** window.

The default sort order is alphabetical by Patient Name. You can sort, filter, and perform other functions on the columns.

3.12.2 Referrals Tab Toolbar

The toolbar shows the date/time for which the data is effective.

Section 2.1.2 provides for more information about the buttons on the right side of the toolbar.

3.12.2.1 Layout

The Layout function determines which referrals columns to display for the current panel as well as the order and sorting that should be used.

To change the layout, do one of the following:

- Click the Layout (
- Select **Referrals** | Layout.

The **Referrals Layout** screen will display for the current panel. Here you can select the **Referrals** columns you want to display on your panel.

Consults Test Panel - Referrals Layout	Customize This Panel C System Default
Available Columns:	Display Columns: Italicized columns are required
Patient Constant of the second sec	Add > Patient Name HRN <remove sex<br="">Age DOB Designated PCP Community Active DX Tags Referral Date Referral # Referral # Referring Provider Status Facility Referred To Patient Type</remove>
Available Sorts:	Sort Columns:
Conter Fatten Data Active DX Tags Designated PCP Referrals	E Switch So Direction
Appointment Date Expected Begin Date Facility Referred To Patient Type Purpose of Referral Referral #	-
	Reset OK Cancel

Figure 3-30: Referrals Layout window

Section 4.3.2 provides information about manipulating the columns of the view.

3.13 Consults Tab

The **Consults** tab displays consult data for the panel of patients.

Properties Patient L	st F	eminders	Rem Aggregated	Natl Measures	Natl Agg	regated	CMET	Care	Mgmt I	Diagnostic Tag	Flag:	Referrals	onsults			
Ca.											-					
Copy Patien	t(s) L	ayout														
onsults for t	he dates	of Feb 26	6, 2015 - Jul 15, 2019											201 - 11 - 11 - 11 - 11 - 11 - 11 - 11 -		
▲ ∆ù	• •	Patient	t Name	/ 7 p	HRN V	Sex	7≎	Age ⊽+¤	DOB V	+ Designate	d⊽≉	Community ♥₽	Active DX Tags ▼+	Consult Date	To Service 🛛 🕈	Status 7
						м		57 YRS				HASKELL INST	Asthma (P)			
						F		46 YRS				HORTON	Asthma (P)			
1						F		55 YRS				HASKELL INST	Obese (P)			
1						F		70 YRS				PAPILLION	CKD 3 (P): DM (P): HTN (P)			
						F		39 YRS				HORTON	Asthma (P)			
1		1.1.1				F		23 YRS				UNKUMUTE	Asthma (P): Preg (P)			
-						F		68 YRS				ТОРЕКА				
٣						м		46 YRS				ТОРЕКА	ASCVD Risk (P): Obese (P): PreDM (P)			
						м		54 YRS				ATCHISON	Asthma (P); HIV (A); HTN (P)			
-						F		69 YRS				HORTON				
1						F		74 YRS				DELIA	DM (P); HTN (P)			
1						F		72 YRS				MAYETTA				
1						F		98 YRS				OMAHA	DM (P)			
						F		55 YRS				WHITE CLOUD	Asthma (P)			
1						м		63 YRS				CIRCLEVILLE	DM (P); HTN (P)			
1						F		73 YRS				MAYETTA	ASCVD Risk (P): DM (P): HTN (P)			
1						F		34 YRS				HIAWATHA	Asthma (P)			
						F		77 YRS				TOPEKA				
1						F		50 YRS				HIAWATHA				
-						F		72 YRS				ТОРЕКА				

Figure 3-31: Sample Consults tab

3.13.1 Consults Tab Layout

The default view displays the standard Patient Demographic columns (see Figure 3-1) plus specific Consult columns.

Table 3-14: Consults tab

Column	Information
Individual Columns	There are individual columns for each Consult.

Double-click any row in the grid to access the Consults tab of the Patient Record window.

The default sort order is alphabetical by Patient Name. You can sort, filter, and perform other functions on the columns.

3.13.2 Consults Tab Toolbar

The toolbar shows the date/time for which the data is effective.

Section 2.1.2 provides for more information about the buttons on the right side of the toolbar.

3.13.2.1 Layout

The Layout function determines which consult columns to display for the current panel as well as the order and sorting that should be used.

To change the layout, do one of the following:

- Click the Layout () button.
- Select Consults | Layout.

The **Consults Layout** screen will display for the current panel. Here you can select the **Consults** columns you want to display on your panel.

🖳 Example panel - Consults Layout			1.000	×
C Template: Consults Default Available Columns: Consults Associated Results Consult Number From Location Last Action Cocation Ordering Facility Place of Consultation Provisional Diagnosis Urgency Patient	Add >	Customize This Panel Display Columns: Patient Name HRN Sex Age DOB Designated PCP Community Active DX Tags Consult Date To Service Status Sending Provider Request Type Patient Type Autorice	C System Default Italicized columns are required	Down
Available Sorts: Consults Attention To Consult Date Patient Type Sending Provider Status To Service Patient Demographics Age Community	Add >	Sort Columns: Patient Name ASC	Reset OK	Up Down Switch Sort Direction

Figure 3-32: Consults Layout window

Section 4.3.2 provides information about manipulating the columns the layout.

3.14 Definition Details

The **Definition Details** tab displays certain types of data based on the Panel Definition for the panel of patients. If the panel is defined using Allergies, CPT, Exams, ER, Inpatient, Labs, Measurements, Medications, Patient Education, POV, Problems, and/or Reminders, an additional **Definition Details** tab will be visible in Panel View.

Pr	operties															
P	atient List	Remin	ders Rem A	ggregate	٦Y	Natl Mea	sures I	Natl Aggi	egated	CMET Care Mg	amt Diagnostic Tags	Flags	Definition Details	Referrals	Consults	
	<u>_</u>	×	2		*	2	P			2						
Add	Open	Remove	Repopulate	Сору	Cut	Paste	Modify	Share	Layout	Create Register	Update DPCP					

Figure 3-33: **Definition Details** display

The **Definition Details** tab will normally be before the **Referrals** and the **Consults** tab. If the Panel Definition has only one of the above listed Groups, it will automatically default when clicking on the Definition Details tab.

Properties	
Patient List Reminders Rem Aggregated	Natl Measures Natl Aggregated CMET Care Mgmt Diagnostic Tags Flags Definition Details Referrals Consults
Please Select a Group: Medications	Copy Patient(s) Layout

Figure 3-34: Definition Details default of Medications

Otherwise, you will need to select the Group in order to see the detail information.

Properties	
Patient List Reminders Rem Aggregated Natl M	easures Natl Aggregated CMET Care Mgmt Diagnostic Tags Flags Definition Details Referrals Consults
Please Select a Group:	Copy Patient(s) Layout
Measurements	

Figure 3-35: **Definition Details** for Exams AND Measurements

3.14.1 Definition Details Layout

The default view displays the standard Patient Demographic columns (see Figure 3-1) plus selected individual columns for the group.

Table 3-15: Definition details

Column	Information
Individual Columns	There are individual columns for each Definition Details Group.

Double-click any row in the grid to access the Patient Record for the selected patient.

The default sort order is alphabetical by Patient Name. You can sort, filter, and perform other functions on the columns.

3.14.2 Definition Details Toolbar

Section 2.1.2 provides for more information about the buttons on the right side of the toolbar.

The standard buttons for the **Definition Details** toolbar are **Copy Patient(s)**, **Layout**, and **Background Job**.



Figure 3-36: Definition Details toolbar

Reminder Notifications has an additional button, Notification Process.



Figure 3-37: Definition Details toolbar for Reminder Notifications

3.14.2.1 Layout

The Layout function determines which Definition Details columns to display for the current panel and Group as well as the order and sorting that should be used.

Each Group has its own list of columns.

To change the layout, do one of the following:

- Select the Group.
- Click the Layout (

The appropriate **Group Layout** screen will display for the current panel. Here you can select the Group columns you want to display on your panel.

Template: Exams Default	-	C Customize This Pa	nel C System Default	
ailable Columns:		Display Columns:	Italicized columns are required	1
Exams Date/Time Last Modified Encounter Provider Intered By Modified By Patient	Add >	Patient Name HRM Sex Age DOB Designated PCP Community Active DX Tags Date Exam Result		Up Down
ailable Sorts:		Sort Columns:		-
► Exams ► Date ► Exam ► Result ► Patient ■ Demographics ■ Age ► Community ► DOB ► HRN ► Sex	Add > <	Patient Name ASC		Up Down Switch S Directio

Figure 3-38: Exams Layout window

3.14.2.2 Notification Process

To use the Notification Process, the user must have an electronic signature set up in RPMS and default telephone and letter clinics set up in User Preferences. See Section 4.3 for more information.

Select the patients for whom to perform the Notification Process and click the button.

erdue Foot														
Inconstine														
Topernes						V		-		- X		Y		
Patient List	Reminders	Rem Aggregated	Nati Measures	Nati Aggre	gated CMET	Care Mgmt	Diagnostic Tags	Flags	Definitio	on Details	Referrals	Consults		
ase Select a G	roup: Remin	der Notifications	• Copy	Patient(s)	Layout Notific	ation Process	3							
Y 74 Y	VP Patient	Name	≙⊽+¤ HRN	⊽⇔ Sex	⊽‡ Age ⊽‡	DOB V+	Designated P_ V+	Communit	y ∀ ₽	Active DX Tag	s ⊽‡	Reminder	Notificatio V 4	Notificatio_ 🗸
Remind	er Notification	n in the second s							×	DM (P)	3	Jul 15, 2019		
Reminder No	tification									DM (P): HTN (P)	Jul 15, 2019	Apr 10, 2019	LETTER
Use this wo	orksheet to pro	ocess Patient Remino	der Notifications.						1	DM (A); HTN (P)	Jan 05, 2017	Apr 10, 2019	LETTER
Notifica	tion Type								-1	DM (A): HTN (Obese (P)	P):	Dec 05, 2016	Apr 10, 2019	LETTER
Netter	T	(TRANKS							- 1	DM (A): HTN (Obese (P)	P).	Mar 18, 2015	Apr 10, 2019	LETTER
Notificatio	a type :	and the	-						- 1	DM (A); HTN (P)	Jan 05, 2017		
Crea	ite									COPD (P); DM Glau (P); HTN	I (A); (P)	Feb 21, 2015		
Selecte	d Events:									DM (A): HTN (Aug 21, 2014		
										DM (A): HTN (Jul 09, 2015		
Patient Nam	ne	HRN	DOB	Sex	Reminder		Communication Prefere	ence	^	ASCVD Kn (P)	; DM	Aug 15, 2014		
				М	DM Foot Exam	(EHR)				(A); HTN (P)				
				F	DM Foot Exam	(EHR)			11	DM (A)		Nov 05, 2015		
				F	DM Foot Exam	(EHR)			- F	DM (A)		Sep 02, 2015		
				м	DM Foot Exam	(EHR)				DM (A); Glau HTN (P)	(P);	Jul 09, 2015		
				M	DM Foot Exam	(EHR)				DM (A): HTN (P)	Jun 13, 2015		
				М	DM Foot Exam	(EHR)				DM (A)- HTN	P)	Aug 06 2014	Apr 10, 2019	LETTER
				M	DM Foot Exam	(EHR)			~	S. (-), (114)				
							ОК	Cancel		DM (A): HTN (P)	Aug 27, 2015		
							· · · · · · · · · · · · · · · · · · ·			DM (A)- HTN (P)·	Aug 01 2015		

Figure 3-39: Notification patient selection

The **Notification Type** defaults to PHONE. The current selections are PHONE, EMAIL, and LETTER. At this time, only **PHONE** and **LETTER** are functional. Selecting EMAIL will gray out the **Create** button.

Click the **Create** button. You will be able to manually write a note or use an existing TIU template to generate a note.

3.14.2.2.1 TIU Note Fields

The default view displays the fields in the order shown in Table 3-16.

Column	Information
Document Title	Required field.
Subject	Subject of the note.
Show Templates	Check box when checked allows the user to use My Templates or Shared Templates .
My Templates	Templates set up in EHR that only the user can access.
Shared Templates	Templates set up in EHR that all users can access.

Table 3-16: TIU Note fields

Work with your EHR CAC to help set up templates and to discuss which document title is the best to use for Reminder Notifications.

Template Editor							×			
Edit Action Tools					New T	emplate				
Shared Templates		Personal Templates	Pe	ersonal Temp	olate Prope	erties				
⊞… 🗐 Shared Templates	1	🖃 🗐 My Templates	Na	<u>m</u> e: Immuni:	zations					
		🖹 Overdue Foot Exam 🖺 Immunizations	Te	mplate Type	: 🖹 Tem	nplate	~			
		🦾 🖺 Overdue Eye Exam	D	(ialog:			$\overline{\mathbf{v}}$			
				Active Hide Items in Template Drawer Exclude from Group Boilerplate	Dialog Dis On Inc On Hic r of Blank	g Properties splay Only lly Show Fi dent Dialog le Item Onl de Dialog I Lines	st Line Items y ems			
		🗹 Hide Inactive 🕈 Delete 🗙		to inse	t between	items	Lock			
Template <u>B</u> oilerplate Allow Long Lines Line: 1	6	Column: 67								
Dear Parent or Guardian: Your child, PATIENT FIRST NAME , is due for the following immunizations below: IMMUNIZATIONS DUE										
Please call our clinic at 555-5555 to make	Please call our clinic at 555-5555 to make an appointment, thanks.									
Show Template N	lotes			OK	Cancel	A	pply			

Figure 3-40: TIU — Template Editor window

verdue Fo	ot													
Properties														
Patient List	Reminders	Rem Aggregated	Natl Measures	Natl Aggr	egated	CMET	Care Mgm	t Diagnostic Tags	Flags	Definit	ion Details Referrals	Consults		
ase Select a	Group: Remin	der Notifications	• Cop	Patient(s)	Layout	Notificat	tion Proce	5 3	1000					
* 74 *	V ₽ Patient	Name	≙⊽≄ HRN	⊽+¤ Sex	70	Age ⊽+₽	DOB V	Designated P_ V	De Communit	y ⊽≮	Active DX Tags V+	Reminder_ 🗸 🕁	Notificatio_ 🗸 🕈	Notificatio
Remin	nder Notification	n								×	DM (P)	Jul 15, 2019		
Reminder I	Notification									_	DM (P); HTN (P)	Jul 15, 2019	Apr 10, 2019	
Use this w	worksheet to pro	ocess Patient Remind	der Notifications.								DM (A): HTN (P)	Jan 05, 2017	Apr 10, 2019	LETTER
NUE	- Ken Tenn										DM (A); HTN (P); Obese (P)	Dec 05, 2016	Apr 10, 2019	LETTER
Notific	cation Type										DM (A); HTN (P); Obese (P)	Mar 18, 2015	Apr 10, 2019	
Notifical	tion Type*:	LETTER	-								DM (A): HTN (P)	Jan 05, 2017		
Cn	eate										COPD (P); DM (A); Glau (P); HTN (P)	Feb 21, 2015		
Select	ted Events:										DM (A): HTN (P)	Aug 21, 2014		
											DM (A); HTN (P)	Jul 09, 2015		
Datiant M		LIDN	DOP	Car	Pamin	dar		Communication Profe		-	ACCUDIN- (D. DM	15 2024		
Paperit No	dine	nnn	DOB	M	DM Fo	iot Exam (8	EHR)	Communication Free	sterice		(A): HTN (P)	Aug 15, 2014		
				F	DM Fo	ot Exam (B	EHR)					Nov 05, 2015		
				F	DM Ea	ot Exam (F	EHR)			-88	DM (A)	Sep 02, 2015		
				М	DM Fo	ot Exam (B	EHR)				DM (A): Glau (P): HTN (P)	Jul 09, 2015		
				M	DM Fo	ot Exam (B	EHR)				DM (A); HTN (P)	Jun 13, 2015		
				М	DM Fo	ot Exam (E	EHR)				DH (A) HTN (D)	Aug 00 2014	4	LETTER
				М	DM Fo	ot Exam (B	EHR)			~	UM (A); H (N (P)	Aug 06, 2014	Apr 10, 2019	LETTER
								OK	Cancel		DM (A): HTN (P)	Aug 27, 2015		
4														

Figure 3-41: Patient selection

🗎 Add TIU Note - Batch Mod	e								_		\times
File											
	🐴 Find	A ^a Font	Copy	Dint Preview	Print	⊡ Edit Note	🗙 Delete Note	Save Note	⊡ ≊ Sign 1	Note	Close
*Document Title: PATIENT_LETTER Subject Overdue Immunizations Show Templates? ✓	•										
🖳 Template: Immunizations							- 0	×			
ITODAY'S DATEI IPATIENT FIRST NAMEI IPATIE IADDRESS-ONE LINEI Dear Parent or Guardian: Your child, IPATIENT FIRST NA below: IIMMUNIZATIONS DUEI Please call our clinic at 555-555	NT LAS MEI, is (T NAME due for t ke an ap	i he followin	ng immunizations t, thanks.							
C 7 8 7 7								i j	L	DM (P))

Figure 3-42: Add TIU Note - Batch Mode window — document selection

📄 Add TIU Note - Batch Mode						- 0	×						
File													
辞	Aa 🗈		e e	\times			Close						
Find	d Font Copy	Print Preview	Print Edit Note	Delete Note	Save Note	Sign Note	0.050						
*Document Title:			Immunization C	linic	Save	without Sigr	nature						
PATIENT_LETTER													
Subject	ITODAY'S D	ATEI											
Overdue Immunizations	PATIENT F	ATIENT FIRST NAME PATIENT LAST NAME DDRESS-ONE LINE											
Show Templates? 🔽	ADDRESS-0												
My Templates Overdue Foot Exam Immunizations Overdue Eye Exam Shared Templates	Dear Paren Your child immunizati below: IMMUNIZAT Please cal	t or Guardia , PATIENT F ons IONS DUE l our clinic	n: IRST NAME , is o at 555-5555 to	due for th make an a	e followi ppointmen	ng It, thank	s.						

Figure 3-43: Add TIU Note - Batch Mode window — select template and save note

Once the **Save Note** button is no longer highlighted, it takes you back to the **Patient** selection screen where you click **OK**. You will be asked to confirm saving the data. At any time, you can click **Cancel**.



Figure 3-44: Confirmation pop-up

Click **OK** and you will be prompted to enter your electronic signature. You can still **Cancel** at this point and nothing will be saved.

骎 Enter Electronic Signature	_		×
Please sign:			
	ОК	Can	cel

Figure 3-45: Electronic Signature pop-up

Once you enter your electronic signature, the document is saved for every selected patient. You will be prompted to print the notes.



Figure 3-46: Print TIU Notes pop-up

You can view the notes on the **Print Preview** dialog, then select a printer to print them to.


Figure 3-47: Print Preview dialog

Print Print	×
General	
Select Printer	
≣ ª Fax	🚍 Send To OneNote 16
Microsoft Print to PDF	
Contraction of the second seco	
<	>
Status: Ready	Print to file Preferences
Location:	Find Printer
Comment:	
Page Range	, I
○ AI	Number of copies: 1 🕂
C Selection C Current Page	
C Pages:	Collate
	125 125
	Dist. Consel
	Print Cancel Apply

Figure 3-48: Print dialog — select printer

Check the printer before closing to ensure the letters printed out correctly. You will not be able to batch print the letters later if there is a problem; they can only be printed individually. The Notification Date and Notification Type columns will populate after closing the **Print** dialog.

Overdue Fo	oot											
Properties												
Patient Lis	t Reminde	ers Rem Aggregated	Natl Measures	Natl Aggregated	CMET	Care Mgmt	Diagnostic Tags	Flags Definit	on Details Referral	Consults		
	-			b m								
Please Select	a Group: Re	minder Notifications	Copy	Patient(s) Layou	Notific t	ation Process	3					
* 77	🐮 🔽 🕂 Pa	tient Name	≙⊽≠ HRN	⊽+ Sex ⊽≠	Age ⊽+¤	DOB V+	Designated P	Community ⊽+	Active DX Tags 🛛 🖛	Reminder	Notificatio 🖓 🖶	Notificatio 🔽 🖶
				м	18 YRS	Jun 14, 2001		MAYETTA	DM (P)	Jul 15, 2019	Jul 15, 2019	LETTER
				F	74 YRS	Sep 28, 1944		DELIA	DM (P); HTN (P)	Jul 15, 2019	Jul 15, 2019	LETTER
				F	66 YRS	Apr 18, 1953			DM (A): HTN (P)	Jan 05, 2017	Jul 15, 2019	LETTER
				M	25 YRS	May 02, 1994		WHITE CLOUD	DM (A); HTN (P);	Dec 05, 2016	Jul 15, 2019	LETTER
				м		lup 15, 1970			Obese (P)	Mar 10, 2015	1.115 2019	
				m	41105	JUII 13, 1976		MURHILL	Obese (P)	Mdl 16, 2015	Jul 15, 2015	
				М	60 YRS	Jul 13, 1959		UNKUMUTE	DM (A); HTN (P)	Jan 05, 2017	Jul 15, 2019	LETTER
				М	67 YRS	Apr 10, 1952		HORTON	COPD (P): DM (A): Glau (P): HTN (P)	Feb 21, 2015	Jul 15, 2019	LETTER
۲				М	8 YRS	Dec 20, 2010		HIAWATHA	DM (A); HTN (P)	Aug 21, 2014	Jul 15, 2019	LETTER
				М	59 YRS	Oct 31, 1959		FALLS CITY	DM (A); HTN (P)	Jul 09, 2015	Jul 15, 2019	LETTER
				F	60 YRS	Jun 06, 1959		SABETHA	ASCVD Kn (P); DM (A); HTN (P)	Aug 15, 2014	Jul 15, 2019	LETTER
•				F	22 YRS	Aug 30, 1996		FALLS CITY	DM (A)	Nov 05, 2015	Jul 15, 2019	LETTER
				F	64 YRS	Jul 01, 1955		HIAWATHA	DM (A)	Sep 02, 2015		
	N.			F	75 YRS	Jul 18, 1943		WHITE CLOUD	DM (A); Glau (P); HTN (P)	Jul 09, 2015		
				F	67 YRS	Feb 03, 1952		HIAWATHA	DM (A); HTN (P)	Jun 13, 2015		
				F	48 YRS	Mar 16, 1971		FALLS CITY	DM (A); HTN (P)	Aug 06, 2014	Apr 10, 2019	LETTER
				м	68 YRS	May 11, 1951		RESERVE	DM (A); HTN (P)	Aug 27, 2015		
-				м	40 YRS	Apr 28, 1979		FALLS CITY	DM (A); HTN (P);	Aug 01, 2015		
				F	60 YRS	Apr 20, 1959		FALLS CITY	Asthma (P); DM (A);	Jul 09, 2015		

Figure 3-49: **Definition Details** completion

3.14.2.2.2 TIU Note Toolbar

🖳 Search	_	□ ×
Find What:	•	Find Next
Show Additional Search Options		Cancel

Figure 3-50: TIU Note toolbar

Find What: Find a string in the letter.

-		
Font		×
Font: Engravers MT ENGRAVERS I	Font style: Expanded Bold EXPANDE	Size: 10 OK 10 Cancel
Eras ITC FELIX TITLING Footlight MT Foot a	EXPANDE EXPANDI EXPANDI	12 14 16 18 20 ¥
Effects	Sample AABBYY	-ZZ
	Script: Western	•

Figure 3-51: Font dialog

- Font: Change the default font.
- **Copy**: Copy the text of the note
- Print Preview: View the selected template on the Print Preview dialog
- **Print**: Disabled until the user saves and signs the note
- Edit Note: Disabled function
- **Delete Note**: Disabled function
- Save Note: When the note is completed
- Sign Note: Disabled until the user saves the note
- Close: When the note has been saved

4.0 Package Operation

All users, when given access to the iCare GUI, can create panels, view data, and perform without having any specific security keys. Certain keys can be given for more in-depth access. Any button needing additional access will display with a message. For example, the **Update DPCP** button requires an additional security key.



Figure 4-1: Insufficient Access Rights message

All views in iCare have the **File**, **Edit**, **Tools**, **Window** and **Help** options. Panel View additionally has a **Patients** option. Each view may have different selections within the options.

File Edit View Tools Window Help

Figure 4-2: Main view options

4.1 File



Figure 4-3: Main view File menu options

File	Edit Patients	Tools	Window	Help
Figu	ire 4-4: Panel \	liew o∣	otions	
File	Edit Patients	Tools]	
•	New Ctrl	+N		
P	Modify			
	Share			
	Layout			
	Save Ctrl	+S		
	Page Setup			
	Print Preview			
3	Print			
	Panel Propertie	25		
3	Background Jo	bs		
	Close			

Figure 4-5: Panel View File options

4.1.1 Background Jobs

The Background Jobs icon can be found in many places in iCare as well as in the File menu. Click the icon or select the option for a display of the state of all iCare background jobs.

Job 🗠	Type /	Start	End	Status	Next scheduled
MONTHLY	IPC Update	Jul 04, 2019 08:49 AM	Jul 04, 2019 08:49 AM		Aug 04, 2019 08:45 AM
NIGHTLY	Best Practice Prompts	Jul 09, 2019 09:02 AM	Jul 09, 2019 09:02 AM		Jul 10, 2019 08:45 AM
	Care Mgmt Update	Jul 09, 2019 09:02 AM	Jul 09, 2019 09:02 AM		Jul 10, 2019 08:45 AM
	CMET Data Mining	Jul 09, 2019 09:02 AM	Jul 09, 2019 09:02 AM		Jul 10, 2019 08:45 AM
	Comm Alerts	Jul 09, 2019 08:45 AM	Jul 09, 2019 08:45 AM		Jul 10, 2019 08:45 AM
	Diagnostic Tags	Jul 09, 2019 08:45 AM	Jul 09, 2019 08:45 AM		Jul 10, 2019 08:45 AM
	Flags	Jul 09, 2019 08:45 AM	Jul 09, 2019 08:45 AM		Jul 10, 2019 08:45 AM
	Natl Measures	Jul 09, 2019 08:45 AM	Jul 09, 2019 08:46 AM		Jul 10, 2019 08:45 AM
	Panel Autopopulate	Jul 09, 2019 09:02 AM	Jul 09, 2019 09:04 AM		Jul 10, 2019 08:45 AM
	Reminders	Jul 09, 2019 08:46 AM	Jul 09, 2019 09:02 AM		Jul 10, 2019 08:45 AM
WEEKLY	Best Practice Prompts	Jul 07, 2019 09:00 AM	Jul 07, 2019 09:03 AM		Jul 14, 2019 09:00 AM
	Care Mgmt Update	Jul 08, 2019 08:10 AM	Jul 08, 2019 08:21 AM		Jul 15, 2019 08:10 AM
	Diagnostic Tags	Jul 06, 2019 02:00 AM	Jul 06, 2019 02:01 AM		Jul 13, 2019 02:00 AM
	IPC	Jul 07, 2019 09:05 AM	Jul 07, 2019 09:05 AM		Jul 14, 2019 08:46 AM
	Natl Measures	Jul 06, 2019 02:01 AM	Jul 06, 2019 02:04 AM		Jul 13, 2019 02:00 AM
	Reminders	Jul 04, 2019 11:40 AM	Jul 04, 2019 12:00 PM		Jul 11, 2019 11:40 AM

Figure 4-6: Background Jobs

There are five individual iCare background jobs that should be scheduled in TaskMan. The Nightly job should be scheduled daily and the four weekly jobs should be scheduled weekly (not at the same time). The monthly and weekly IPC jobs are handled automatically via the Nightly job.

If the End column is earlier than the Start column and in red, there may be a problem with that particular job.

Monitoring the Background Jobs is important so that the data seen in iCare is up to date.

4.2 Edit

The Edit option is the same for all views.



Figure 4-7: **Edit** menu options

4.3 Tools

Tool	Tools Window Help								
Q	Quick Patient Search	F8							
ŋ	Reset View								
\$	Refresh	F5							
孡	Search	Ctrl+F							
\mathbb{Z}	Excel Export	Ctrl+E							
3	Print	Ctrl+P							
Ð	Copy Rows to Clipboard	Ctrl+Shift+C							
	Manage Templates								
P	User Preferences								
6	View iCare Notifications								
	iCare Package Manager		×						
	iCare Site Parameters		×						
	Taxonomy Maintenance		×						
	Web Links		۲						
	View iCare Log								

Figure 4-8: Main View **Tools** menu options

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Figure 4-9: Other View Tools options

4.3.1 User Preferences

There is a User Preference specifically for Panel View where the user can choose which tabs to have access to display.

The second terms of te	2		
Define My Patients Flag Setup Comm Alert Setup Startup View Patient View	Panel View	w Layouts	CMET IPC
Select the tab(s) you want to display when opening the iCare Panel View	View Size:	Normal	C Maximize
Tabs			
	Show/Hide	Starting Tab	
Care Mgmt			
CMET	\checkmark		
Consults			
Diagnostic Tags	\checkmark		
Flags			
Natl Aggregated	\checkmark		
Natl Measures	\checkmark		
Patient List	\checkmark		
Referrals	\checkmark		
Rem Aggregated	\checkmark		
Reminders			

Figure 4-10: Panel View in User Preferences

Select the tab you wish to have as your Starting Tab when you open a panel. All tabs default to **Show**. Deselect any tab to hide it. The **Definition Details** tab will always display if the panel definition indicates.

Select an option button for the view size when opening the iCare Panel View: **Normal** or **Maximized**.

4.3.2 Manage Templates

Views can be modified through Manage Templates or via the **Layouts** button. Every view in iCare has a Default view Template. Each view can be modified either by customizing the view, modifying the default template, or creating a new template via Manage Templates. Click the Layout button to display the Layout window.

🖳 Visits This Calendar Year - Patient List Layout				×
Template: Patient Default	•	C Customize This Pane	I C System Default	
Available Columns:		Display Columns:	Italicized columns are required	
Patient	Add > < Remove	Patient Name HRW Sex Age DOB Designated PCP Community Active DX Tags		Up Down
Available Sorts:		Sort Columns:		
Patient Demographics Age Community DOB HRW Sex Other Patient Data Active DX Tags Designated PCP	Add > < Remove	Patient Name ASC		Up Down Switch Sort Direction
			Reset OK	Cancel

Figure 4-11: Layout window

Users can choose to keep the Template default view, customize the view for this panel only, or revert to the System Default if the layout has been changed.

-			
Template:	Patient Default	-	C Customize This Panel C System Default

Figure 4-12: Views

You can pick from any selection of templates that exist for that view.

🚽 Appts Diabetic Clinics - Patient List Layout					×
© Template: Patient Default patient view	•	C Customize This Pan	el C System Defau	ult	
Available Columer patient list-	019 09:20:07	Display Columns:	Italicized colum	nns are required	
	Add >	HRN			Up
	< Remove	Sex Age			Down
		DOB			
		Community			
		Active DX Tags			
Available Sorts:	1	Sort Columns:			
Patient Demographics	Add >	Fatient Name ASC			Up
- Age Community	< Remove				Down
- DOB					Switch Sort
Sex					Direction
Other Patient Data Active DX Tags					
Designated PCP					
Designated PCP					

Figure 4-13: Template selection

There are four boxes you can use to change data:

- Available Columns (data element columns available to view)
- Display Columns (data element columns already selected for the view)
- Available Sorts (data element columns available to sort the data by)
- Sort Columns (data elements already selected for sorting)

See Appendix A for a list of the data element columns available for display for all layout views.

Use the **Add** and **Remove** buttons to move data elements back and forth from the Available Columns and Display Columns boxes and from the Available Sorts and Sort Columns. They will be enabled if the user selects the **Customize This Panel** option button.

Add > < Remove	Add > < Remove
Add > < Remove	Add > < Remove

Figure 4-14: Add and Remove buttons

Customizing the view is only for this specific panel. If the layout is changed to template or system default, the customized view will be gone.

Users can always revert back to the System Default or a template.

Up	
Down	
Up	
Down	
Switch Sort Direction	

Figure 4-15: Up, Down, and Switch Sort Direction buttons

The **Up** and **Down** buttons will move the selected data elements up or down in the Display Columns or Sort Columns boxes. The **Switch Sort Direction** button changes the order of the sort from the default Ascending (A–Z) to Descending (Z–A).

If you click on the column heading to change the sort, it will automatically change the value in the Sort Columns box.

			;	×	Community
 Customize This Panel 	C System Default				
Display Columns:	Italicized columns	are required	1		
Patient Name			Up		
Sex			Down	1	ALBUQUERQUE
Age			Down		B CYPRESS RE
бов					BICKLETON
Designated PCP Community					BIG CABIN
Active DX Tags					CIRCLEVILLE
					CORRALES
					EVEREST
					EVEREST
					FALLS CITY
Sort Columns:					FALLS CITY
Community ASC			Up	-	FALLS CITY
			Down		FALLS CITY
			Switch Sort Direction		FALLS CITY
					FALLS CITY
					FALLS CITY
					FALLS CITY
					FALLS CITY
	Reset	ОК	Cancel		FALLS CITY
				-	FALLS CITY
М	29 YRS				FALLS CITY
F	63 YRS				GEORGIA UNK
М	57 YRS				HASKELL INST
F	55 YRS				HASKELL INST
М	57 YRS				HIAWATHA

Figure 4-16: Changing the Sort Column

When leaving the panel, if the you have changed the column order or sort order, you will be asked if you want to save the changes.



Figure 4-17: Panel Save? pop-up

Appendix A: Panel View Columns

A.1 Patient List

Default template for the Patient List tab is named Patient Default. Other tabs also have the **Required** and **Default** fields from this view as well as their specific column fields.

A.1.1 Address

Column	Information
Alt Phone	The OTHER PHONE number from patient registration
City	The city name of the patient's address
Email Address	The current email address of the patient
Home Phone	The PHONE NUMBER [RESIDENCE] from patient registration
Location of Home	A description of where the patient's home might be found
State	The state of the patient's address
Street Address	The mailing address of the patient
Work Phone	The WORK PHONE from patient registration

A.1.2 CRS Flag

Column	Information
CRS Active Clinical	A patient who had an AMBULATORY, DAY SURGERY, HOSPITALIZATION or OBSERVATION visit to a primary care clinic in the CRS report range
CRS DM DX Ever	If patient ever had a diabetes (DM) diagnosis recorded in RPMS using taxonomy SURVEILLANCE DIABETES
CRS DM DX Report Period	If the patient had a DM diagnosis in the Report Period
CRS First DM Dx	If the patient's First DM diagnosis was before Report Period
CRS One DM Visit	If the patient had 1 DM visit in Report Period
CRS Two DM Visits	If the patient had 2 DM visits in Report Period

A.1.3 Demographics

Column	Information
Beneficiary	The patient's CLASSIFICATION/BENEFICIARY from patient registration; e.g. INDIAN/ALASKA NATIVE, NON-INDIAN SPOUSE, etc.

Column	Information
CRS Pop	Whether the patient is identified as User Population (UP) or Active Clinical (AC) by CRS
Cause of Death	In PCC, the Underlying Cause of Death (UCD) is where this information can be entered.
Communication Preference	The method by which the patient has indicated they wish to be communicated with from patient registration - PHONE;EMAIL;LETTER;DO NOT NOTIFY
Date of Death	If the patient has been marked as deceased, the date of death from patient registration
Date/Time Added	The date/time the patient was added to the panel
Ethnicity	The ethnicity of the patient from patient registration
Father's Name	The name of the patient's father from patient registration
Manually Added	Identifies if the patient was manually added or removed from the panel, if blank then the patient was added via panel definition criteria
Mother's Name	The name of the patient's mother from patient registration
Other Tribes	Any other tribes that the patient is associated with besides the TRIBE OF MEMBERSHIP
Perf Met	If the patient is YES for all applicable CRS measures or not
Preferred Language	The language by which the patient prefers to communicate in
Tribe	The TRIBE OF MEMBERSHIP of the patient
Who Manually Added	The user who manually added a patient to the panel

A.1.4 Measurement

Any active measurement found in the Measurement Type (File #9999999.07). Measurement updates are released in AUM releases. The iCare Nightly Background job will determine which measurement is active and will add any new ones to the list.

Column	Information
Last measurement	Displays the date of the last measurement type

A.1.5 Other Patient Data

Column	Information
Active Insurance Coverage	Any active insurances that the patient has
Advanced Directives	If the patient has any advanced directives on file in RPMS
Allergies	If the patient has any allergies
Last Immunization Notification	The last recorded immunization notification in iCare

Column	Information
Last Reminder Notification	The last recorded reminder notification in iCare
Medicaid Number	If the patient has Medicaid, the Medicaid number
Specialty Providers	The active Provider category a patient could be assigned to; e.g. Case Manager

A.1.6 Visit Related

Column	Information
IPC Adolescent Qualify Dates	The dates that the patient should have had an immunization visit, if the patient was 13 yrs old during the IPC report period
IPC Depress Office Visit	If the patient had a depression office visit
IPC Flu Office Visit	If a visit that meets the IPC Influenza Immunization Status encounter criteria
IPC Last Office Visit	The last office visit per IPC requirements which is usually has a specific visit CPT code
Last 3 Visit Clinics	The clinics of the last 3 visits that the patient had (no visit type filter)
Last 3 Visit Dates	The dates of the last 3 visits that the patient had (no visit type filter)
Last 5 Visit Clinics	The clinics of the last 5 visits that the patient had (no visit type filter)
Last 5 Visit Dates	The dates of the last 5 visits that the patient had (no visit type filter)
Last Appt Clinic	The clinic of the last appointment of the patient
Last Appt Date	The date of the last appointment of the patient
Last PC Visit Location	The last location of encounter for the last ambulatory visit whose clinic is a primary care clinic
Last PC Visit POV Narrative	The Purpose of Visit narrative of the last ambulatory visit whose clinic is a primary care clinic
Last PC Provider Narrative	The provider's narrative of last ambulatory visit whose clinic is a primary care clinic
Last Primary Care Visit Clinic	The clinic of the last ambulatory visit which is a primary care clinic
Last Primary Care Visit Date	The date of the last ambulatory visit whose clinic was a primary care clinic
Last Primary Care Visit Provider	The provider of the last ambulatory visit whose clinic was a primary care clinic
Last Visit Clinic	The clinic of the last visit that the patient had (no visit type filter)
Last Visit Date	The date of the last visit that the patient had (no visit type filter)

Column	Information
Last Visit Date w DPCP	The date of the last ambulatory or hospitalization visit where the assigned primary care provider was listed as a provider
Last Visit Date/Time	The date/time of the last visit that the patient had (no visit type filter)
Last Visit Location	The location of encounter for the last visit that the patient had (no visit type filter)
Last Visit POV Narrative	The Purpose of Visit narrative of the last visit that the patient had (no visit type filter)
Last Visit Provider	The provider of the last visit that the patient had (no visit type filter)
Last Visit Provider Narrative	The provider's narrative of last visit that the patient had (no visit type filter)
Next 3 Appt Clinics	The clinics of the next 3 appointments that the patient is scheduled for
Next 3 Appt Dates	The dates of the next 3 appointments that the patient is scheduled for
Next 5 Appt Clinics	The clinics of the next 5 appointments that the patient is scheduled for
Next 5 Appt Dates	The dates of the next 5 appointments that the patient is scheduled for
Next Appt Clinic	The clinic of the next appointment that the patient is scheduled for
Next Appt Date	The date of the next appointment that the patient is scheduled for
Next Appt Date/Time	The date and time of the next appointment that the patient is scheduled for
Next Appt Provider	The name of the default provider defined for the clinic of the next appointment that the patient is scheduled for
Number of No Shows	The number of no show appointments that the patient has had in the past 12 months
Number of Patient Cancels	The number of appointments that the patient cancelled in the past 12 months

A.2 Reminders

There are five (5) categories of Reminders; Health Summary, EHR Clinical Reminders, IZ Forecaster, Care Management, and CMET. The default Reminders template displays the default Health Summary reminders.

Each night, the iCare Nightly Background job checks to see if reminders have been inactivated or if new reminders have been found (or activated). A notification message may be sent to you information you of a newly added or newly deactivated/deleted reminder.

Status	Received	From	Notification Text	Body
	Mar 27, 2019 08:11 AM		Reminder [DTAP,NOS] has been newly added. You may want to update your panel Reminder View layouts.	

A.2.1 Default Health Summary Reminders

The default Health Summary Reminders belong to category General. Health Summary Reminders can be activated or inactivated from the **Health Summary Maintenance** Menu | **Health Maintenance Reminders** | **Activate/Inactivate a Health Maintenance Reminder** menu option.

Column
BLOOD PRESSURE
BREAST EXAM
DENTAL EXAM
DIABETES SCREENING
HEIGHT
HIV SCREENING
PELVIC EXAM
PHYSICAL EXAM
WEIGHT

A.2.2 Optional Health Summary Reminders

A.2.2.1 Behavioral Health

Column
ALCOHOL USE SCREENING
DEPRESSION SCREENING
DOMESTIC VIOLENCE/IPV SCREENING

A.2.2.2 Cancer-Related

Column
COLORECTAL CA-SCOPE/XRAY
MAMMOGRAM
PAP SMEAR
RECTAL

Column

TOBACCO USE SCREENING

A.2.2.3 CVD-Related

Column	
CHOLESTEROL	

A.2.2.4 Elder

Column
FALL RISK ASSESSMENT
TONOMETRY
VISUAL ACUITY EXAM

A.2.2.5 Pediatric

Column
EPSDT Screening
HCT/HGB
HEAD CIRCUMFERENCE
HEARING TEST
NEWBORN HEARING TEST
PPD - TUBERCULOSIS
URINALYSIS

A.2.3 EHR Clinical Reminders

EHR Clinical Reminders are divided into two types: National reminders and Local reminders. National reminders are reminders that are released to all facilities and Local reminders are reminders that are created within a specific facility. Typically national reminders start with **IHS-**, and local reminders will start with a local variation such as the initials of the facility.

Only those reminders that are active will be displayed in iCare. Reminders can be activated or inactivated using the **Reminder Definition Management** | **Activate/Inactivate Reminders** menu option. Reminders with the same name will show up looking like a duplicate reminder. During the iCare Nightly Background job, if such duplicate reminders are found, a notification message will be sent any user designated as an iCare Package Manager (security key BQIZMGR).

Status	Received	From	Notification Text	Body
	Jun 27, 2019 11:44 AM		Duplicate EHR reminders found	The following duplicate EHR reminders are active. Please contact the EHR Reminder CAC to go to the Reminder Definition Management menu and inactivate the incorrect duplicate reminders. DM Foot Exam [IHS-DIAB FOOT EXAM 2013] DM Foot Exam [IHS-DIAB FOOT EXAM 2015]

A.2.4 IZ Forecaster Reminders

IZ Forecaster or Immunization reminders are those reminders found to be due by the Forecaster interface. There may be other immunization reminders in Health Summary or EHR Clinical Reminders, but they are not included in iCare.

Some example Immunization Forecaster immunizations are:

Column
DTaP (IZ)
FLU,NOS (IZ)
HEP A,NOS
HEP B,NOS
HIB,NOS
HPV,NOS
MMR
Men-B,NOS
MenCV4,NOS
PCV-13
POLIO,NOS
Td-ADULT
Tdap
VARICELLA
ZOS-Shgrx

A.2.5 Care Management Reminders

Currently, the only specialized Care Management Reminders are for HIV patients and are a part of the HIV Management System (HMS).

Detailed information about these reminders can be found in Appendix B of the *HIV/AIDS Management User Manual*.

A.2.6 CMET Reminders

Every event in the Care Management Event Tracking becomes a reminder if it was used as a Follow-up event.

A.3 National Measures

There are five (5) categories of National Measures: National GPRA, Non National, Other, IPC, and Developmental. The default Performance template displays the National GPRA measures.

Each night, the iCare Nightly Background job checks to see if a new version of IHS CLINICAL REPORTING (CRS) has been installed at your facility and will automatically update the list of measures. A notification will be sent when the new measures are updated.

Status	Received	From	Notification Text	Body
	Mar 14, 2019 08:10 AM		CRS Updated	The RPMS Clinical Reporting System (CRS) has been updated on your facility's server. This update may affect your iCare Natl Measures view, because of new or inactivated performance measures. Please review your Natl Measures layout and update as needed. CRS UPDATE job scheduled to run MAR 14, 2019 20:00. Your Natl Measures data will not be up-to-date until this job has completed.

A.4 CMET

Please refer to the *Care Management Event Tracking (CMET) User Manual* for the details on this tab.

A.5 Care Management

The current Care Management groups are Asthma, COPD, Diabetes, DM Audit, Hep C, HIV/AIDS, Immunizations, Pediatric, Prenatal, and Employee Health. Employee Health is only accessible if you have the appropriate security key. The access to Employee Health group should only be given to a small group of users who would be monitoring employees.

Each group has their own list of columns. The DM Audit group is based on the current release of the Diabetes Audit (BDM). When a new DM Audit is installed in RPMS, the iCare Nightly Background job will determine if there are any new columns to be added or columns that should be inactivated.

A.5.1 Asthma

Column	Information
Asthma Severity	Most recent Severity, documented in Problem List Classification field. Values are: 1-Intermittent; 2-Mild Persistent; 3-Moderate Persistent; 4- Severe Persistent
Asthma Tag Status	Most recent diagnostic tag status for Asthma only, if any
Last Asthma Visit	Date of most recent Asthma visit, defined as a face-to-face visit with ANY of the following asthma-related data elements documented: Severity, Control, Symptom Free Days, Work/School Missed, and/or Patient Education
Best Peak Flow	Most recent Best Peak Flow value from Measurements file
Last Peak Flow	Most recent Peak Flow value from Measurements file, obtained from a peak flow meter during a visit
Asthma Control	What the designated asthma control is - WELL CONTROLLED;WELL CONTROLLED;VERY POORLY CONTROLLED
FEV1/FVC	Most recent FEV1/FVC values from Measurements file, obtained from spirometry measurements during a visit
Last Action Plan	Date of most recent Action Plan provided to this patient. Action Plans are available from the PCC Patient Wellness Handout
Last Flu Shot	Date of most recent Influenza immunization
Last Asthma ER/UC Visit	Date of most recent visit to the ER or Urgent Care (clinic codes 80 or 30) with Asthma as the primary POV
Last Asthma Hospital Visit	Date of most recent hospitalization (service category H) with Asthma as the primary POV
Last Tobacco Health Factor	Most recent Tobacco Health Factor
On Controller Meds	Is this patient currently prescribed with Asthma Controller medications?
On Inhaled Steroids	Is this patient currently prescribed with Inhaled Steroid medications?
On Reliever Meds	Is this patient currently prescribed with Asthma Reliever medications?
Asthma Quality of Care	All of the following key elements documented: Asthma Severity value ever; Asthma Control and Peak Flow or FEV1 measurement and Asthma Action Plan and Flu Shot in past year; and current Controller medication prescription if Severity is Persistent (2,3 ~or 4)
Symptom Free Days	Value of most recent Symptom Free Days documented in V Measurements
Work/School Days Missed	Value of most recent Work/School Missed documented in V Measurements
ASTHMA TRIGGERS	ASTHMA TRIGGERS from Health Factors broken out into each trigger separately; e.g. Air Pollutants, Dust Mites, etc.

A.5.2 COPD

Column	Information	
Oximetry	The most recent O2 measurement	

Column	Information
Spirometry	The most recent FVFC measurement
Pneumovax	The most recent pneumovax immunizations
Tobacco Assessed	When tobacco assessed
Tobacco Health Factor	The most recent tobacco health factor recorded
Active Inhaled Steroids	Checks if patient has an active medications from site-specified taxonomy BGP ASTHMA INHALED STEROIDS or BGP ASTHMA INHALED STEROIDS NDC
Abdominal Girth	The most recent abdominal girth measurement

A.5.3 Diabetes

Column	Information
DM Onset	The date of the onset of Diabetes for this patient and where the date is documented
Last Height	The last height measurement taken for this patient
Last Weight	The most recent weight measurement taken for this patient
BMI	The value of the BMI calculated from the most recent height and weight measurements for the patient
Tobacco User	NO = Not a current tobacco user. YES = Current tobacco user. Taken rom CRS measure Tobacco Use/Exposure Assessment 5+
HTN Diagnosed?	Has the patient been diagnosed with Hypertension?
On ACE Inhibitor?	Did the patient have an active ACE Inhibitor/ARB medication in the past year?
Aspirin Use/Anti- platelet	Patient had an active aspirin/anti-platelet medication in the past year
Last 3 BP (non ER)	The last three blood pressure measures for this patient in a non ER visit
Depression	If the patient has Depression on the Problem List, no depression screening is needed. Otherwise has the patient had a depression screening in the past year
DM Foot Exam	Has the patient had a foot exam in the past year?
DM Eye Exam	Has the patient had an eye exam in the past year?
Dental Exam	Has the patient had a dental exam in the past year?
Last Dietician Visit	The date of the patient's last visit to a dietician
Seasonal Flu	Returns the last recorded FLU immunization
Pneumovax	The last pneumovax immunization for this patient
TD (10 years)	Did the patient have a TD immunization in the past 10 years
Last TB Health Factor	Last tobacco health factor enter for the patient

Column	Information
HbA1c	The most recent HbA1c test result for this patient
Previous HbA1c	The previous result from the most recent HbA1c lab test for this patient
UACR (Quant A/C Ratio)	The most recent UACR (Quant A/C Ratio) lab test for this patient
Creatinine	The most recent Creatinine lab test for this patient
Estimated GFR	The most recent Estimated GFR lab test for this patient
Total Cholesterol	The most recent Total Cholesterol lab test for this patient
LDL Cholesterol	The most recent LDL Cholesterol lab test for this patient
HDL Cholesterol	The most recent HDL Cholesterol lab test for this patient
Triglycerides	The most recent Triglyceride lab test for this patient
Hep B Series Complete	If the patient has completed the Hep B series of immunizations
CVD Diagnosed?	Has the patient been diagnosed with CVD
Non-HDL Cholesterol	The most recent non-HDL Cholesterol lab test
Last Chest Xray	Date of the last Chest xray for the patient
Last Mammogram	If applicable, the date of the patient's last mammogram
Last Pap Smear	If applicable, the date of the patient's last pap smear
Last TB Test	Last TB test for this patient
Last Waist Circumference	The most recent waist circumference measurement taken for this patient
PPD Status	The status of a PPD test for the patient

A.5.4 DM Audit

See Appendix A in the 2019 Diabetes Audit User Addendum for definitions. The list of columns enabled for iCare are as follows and can change when a new DM Audit is installed in RPMS.

Column
DM Diagosis Date
DM Туре
Tobacco Use
Tob Cessation Counsel
Electronic Nicotine
Last Height
Last Weight
BMI
HTN Documented

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Column
Blood Pressure
DM Foot Exam
DM Eve Exam
Dental Exam
Depression (Active Problem)
Depression Screening
Diet Instruction
Physical Activity Instruction
DM Education
Insulin
Sulfonylurea
Glinide
Metformin
Acarbose
Pioglitazone
DPP4 inhibitors
Amylin Analogues
GLP-1 analog
Bromocriptine
Colesevelam
SGLT-2 inhibitor
ACE/ARB
Statin
CVD Documented
TB Test Done
TB Test Result
TB Result (Pos), Tx Complete
TB Result (Neg)
Seasonal Flu Vaccine
Pneumovax Ever
Td/TDAP (past 10 yrs)
Tdap (ever)
Hep B Series
HbA1c (most recent)
Total Cholesterol
HDL Cholesterol

Column
LDL Cholesterol
Triglycerides
CREATININE
Estimated GFR
UACR
Combined Measure
eGFR and UACR
ENDS Status
Hep C Dx Ever
Hep C Screened
LEAMP
Retinopathy DX

A.5.5 Hep C

Column	Information
HCV Antibody Test	The most recent lab test from site-specified taxonomy BQI HCV ANTIBODY TAX
HCV RNA Test	The most recent lab test from site-specified taxonomy BQI HCV RNA TAX
AST Test	The most recent lab test from site-specified taxonomy DM AUDIT AST TAX
ALT Test	The most recent lab test from site-specified taxonomy DM AUDIT ALT TAX
Platelet Test	The most recent lab test from site-specified taxonomy BQI PLATELET TAX
HCV Viral Load Test	The most recent lab test from site-specified taxonomy BQI HCV VIRAL LOAD TAX
HCV Genotype Test	The most recent lab test from site-specified taxonomy BQI HEP C GENOTYPE TESTS
HIV Test	The most recent lab test from site-specified taxonomy BGP HIV TEST TAX
Fibroscan	The most recent Fibroscan procedure from taxonomy BQI FIBROSCAN CPT PROC
Liver Ultrasound	The most recent Liver Ultrasound procedure from taxonomy BQI LIVER ULTRASOUND CPT
Нер В	Hepatitis B immunization series
Hep A	Hepatitis A immunization series
Other Lab Tests	The most recent other identified lab test from site-specified taxonomy BQI HCV OTHER LAB TESTS

Column	Information
Baseline Lab Tests	The baseline value (and date) and the most recent value (and date) for any lab test from site-specified taxonomy BQI HCV BASELINE LAB TESTS

A.5.6 HIV/AIDS

See Section 2.1 in the *HIV/AIDS Management User Manual* for listing and definitions.

A.5.7 Immunizations

Column	Information
Immunization Short name	Any active immunization found in the IMMUNIZATION File #9999999.14

A.5.8 Pediatric

Column	Information
Activity Level	The most recent ACTIVITY LEVEL health factor
Weight	The most recent weight measurement
Height	The most recent height measurement
BMI	The most recent body mass index measurement
BMI Percentile	The most recent body mass index percentile measurement
Head Circumference	The most recent head circumference measurement
Last Infant Feeding	The most recent entered infant feeding data
Infant Feeding 2mos	Patients who were screened for infant feeding choice at the age of two months (45–89 days)
Infant Feeding 6mos	Patients who were screened for infant feeding choice at the age of six months (165–209 days)
Infant Feeding 9mos	Patients who were screened for infant feeding choice at the age of nine months (255–299 days)
Infant Feeding 1yr	Patients who were screened for infant feeding choice at the age of 1 year (350–394 days)
Lead Screening	The most recent blood lead test from site-specified taxonomy BQI BLOOD LEAD TESTS
Last Dental Visit	The most recent dental visit
ADD/ADHD Dx	The most recent diagnosis from taxonomy BQI ADD/ADHD DXS
Last 3 Well Child Visits	The last three visits where the Purpose of Visit was from SNOMED subset PXRM BQI WELL CHILD VISIT
Last ASQ	All the most recent ASQ measurements

Column	Information
Last Hearing Screening	The most recent hearing exam
Last Vision Screening	The most recent eye exam or vision screening measurement

A.5.9 Prenatal

Column	Information
Currently Pregnant?	The value from the Reproductive Factors file
Definitive Delivery Date	The value from the Reproductive Factors file
Estimated Gestational Age	The Estimated Gestational Age measurement (EGA) from the V Measurement file
High Risk	Based on the prenatal problems that have been given a High priority in the prenatal package in EHR.
Gravida	The Total Number of Pregnancies field in the Reproductive Factors file
Estimated Delivery Date	Based on the most recent date of the EDD (LMP), EDD (ULTRASOUND), EDD (CLINICAL PARAMETERS) or EDD (METHOD UNKNOWN) dates from the Reproductive Factors file
Lab tests	The most recent lab tests entered in site-specified taxonomy BQI PRENATAL TAX

A.5.10 Employee Health

Column	Information
FLU	The most recent influenza immunization
HEP A	The most recent Hepatitis A immunization
HEP B	The most recent Hepatitis B immunization
PPD	The most recent PPD skin test
TDAP	The most recent TDAP immunization
ILI	The most recent Influenza Like Illnesses (ILI) diagnosis
MMR	The most recent MMR immunization
HEP A SERIES	Number of Hepatitis A immunizations to see if the series is complete
HEP B SERIES	Number of Hepatitis B immunizations to see if the series is complete
MMR SERIES	Number of MMR immunizations to see if the series is complete
TB Lab	The most recent TB blood lab test or refusal

A.6 Diagnostic Tags

Column	Meaning
Patient Name	Name of the patient
HRN	Patient's health record number
DOB	Patient's date of birth
Age	Patient's age today
Tag Name	Name of the diagnostic tag
Status	Current status of the tag for the patient. Values are PROPOSED, ACCEPTED, NO LONGER VALID, or SUPERCEDED.
Status Change Reason	Standard reasons why the tag status would have changed.
Status Comment	Comment entered by a user when updating a diagnostic tag.
Last Updated	Date that the tag was updated
Last Updated By	Who updated the tag. It could be a system process or a user who updated.

A.7 Flags

Column	Meaning
Flag Date	Date of the visit that meets the flag criteria
Patient Name	Name of the patient
HRN	Patient's health record number
Sex	F (for female), M (for male), U (unknown), gender of patient at birth
Age	Patient's age today
DOB	Patient's date of birth
Flag Type	Type of flag; can be Abnormal Lab, Emergency Room Visit,
Flag Description	Information about the visit the met the flag criteria; e.g. If not an Abnormal Lab then Provider, Purpose of Visit (POV) Narrative. If an Abnormal Lab, the lab, result, range, type of abnormal, and ordering provider
Designated PCP	The primary care primary to whom the patient has been assigned

A.8 Referrals

Column	Information
Referral Date	Date the referral was initiated
Referral #	The referral number
Referring Provider	Provider who is asking for the referral
Status	Status of the referral - ACTIVE;APPROVED;CLOSED- COMPLETED;CLOSED-NOT COMPLETED

Column	Information
Facility Referred To	The primary vendor
Patient Type	Whether Inpatient or Outpatient
Referral Type	Type of referral - CHS;IHS (ANOTHER FACILITY);OTHER;IN- HOUSE
Expected Begin Date	The expected date for the services to begin (i.e., admission date for a hospitalization)
Appointment Date	The date the services actually began
Purpose of Referral	Text of the purpose of the referral
# Visits Under Referral	The number of outpatient visits that occurred under the authority of this referral
Actual End Date	The date the services actually ended
Actual LOS Hospital	The actual length of stay for a hospital admission
CHS Status	If the referral type is CHS, the status - PENDING;APPROVED;DENIED;PENDING APPEAL
Case Manager	The person who is managing this case
Diagnostic Category	The ICD diagnostic category of the referral
Estimated LOS Hospital	The estimated length of stay for a hospital admission
Expected End Date	The last date services were provided under the authority of this referral
Notes to Scheduler	Notes to be seen by the appointment clerk or the person scheduling the appointment for the patient
Payor	The entity that is primarily responsible for paying for the treatment the patient will receive based on this referral
Priority	A value indicating the priority of this referral
Procedure Category	The CPT service category for which this patient is being referred
Requesting Facility	The facility requesting the referral
Schedule with # days	The Provider records how soon to schedule an appointment for this referral

A.9 Consults

Column	Information
Consult Date	Date of actual entry of consultation request into the file
To Service	The name of the service that will complete the consult
Status	Status of the consult
Sending Provider	The provider who originated the order
Request Type	Whether the order is a consult or procedure
Patient Type	If the service is to be rendered on an outpatient or inpatient basis

Column	Information
Attention To	The name of a person that is to be alerted about the new consult
Associated Results	The reason for requesting the Consult or Procedure request
Consult Number	The order number of the consult
From Location	The location that sent the order to the receiving location
Last Action	The last action taken on the consult
Location	The location of the patient when the consult/request order was placed
Ordering Facility	If a consult/request sent to another Institution, then this is the SENDING hospital/institution
Place of Consultation	The place of consultation: Bedside, Consultant's Choice, On Call, Emergency Room, EKG Lab
Provisional Diagnosis	The Provisional Diagnosis the ordering clinician would specify on the Consult Form
Urgency	The urgency for this order (STAT, ROUTINE, NEXT AVAILABLE, EMERGENCY, TODAY, WITHIN 24 HOURS, WITHIN 48 HOURS, WITHIN 72 HOURS, etc.)

Appendix B: Rules of Behavior

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

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

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

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

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

B.1 All RPMS Users

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

B.1.1 Access

RPMS users shall

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

RPMS users shall not

• Retrieve information for someone who does not have authority to access the information.

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

B.1.2 Information Accessibility

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

RPMS users shall

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

B.1.3 Accountability

RPMS users shall

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

B.1.4 Confidentiality

RPMS users shall

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

RPMS users shall not

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

B.1.5 Integrity

RPMS users shall

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

RPMS users shall not

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

B.1.6 System Logon

RPMS users shall

• Have a unique User Identification/Account name and password.

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

B.1.7 Passwords

RPMS users shall

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

RPMS users shall not

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

B.1.8 Backups

RPMS users shall

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

B.1.9 Reporting

RPMS users shall

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

RPMS users shall not

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

B.1.10 Session Timeouts

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

RPMS users shall

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

B.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

• Eat or drink near system equipment.

B.1.12 Awareness

RPMS users shall

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

B.1.13 Remote Access

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

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

Remote RPMS users shall

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

Remote RPMS users shall not

• Disable any encryption established for network, internet, and Web browser communications.
B.2 RPMS Developers

RPMS developers shall

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

RPMS developers shall not

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

B.3 Privileged Users

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

Privileged RPMS users shall

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

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

Privileged RPMS users shall not

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

Acronym List

Acronym	Meaning
CAC	Clinical Application Coordinator
CMET	Care Management Event Tracking
COPD	Chronic Obstructive Pulmonary Disease
CRS	Clinical Reporting System
CVD	Cardiovascular disease
DOB	Date of Birth
DPCP	Designated Primary Care Provider
EHR	Electronic Health Record
ER	Emergency Room
GPRA	Government Performance and Results Act
GUI	Graphical User Interface
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome
HRN	Health Record Number
IHS	Indian Health Service
IPC	Improving Patient Care
PC	Primary Care
POV	Purpose of Visit
RPMS	Resource and Patient Management System
SNOMED	Systematized Nomenclature of Medicine
SSN	Social Security Number
TIU	Text Integration Utility

Contact Information

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

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

- Web: <u>https://www.ihs.gov/itsupport/</u>
- Email: <u>itsupport@ihs.gov</u>