



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Release of Information Disclosure System

(BRN)

Installation Guide and Release Notes

Version 2.0
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Preface

This is the installation guide for the Release of Information Disclosure System v2.0. Included are release notes that should be shared with all users of the system and instructions for installing the package.

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1.0 Release Notes

1.1 General Information

The Release of Information (ROI) SYSTEM (Version 2.0) is a Nationally certified RPMS Software application. This new version replaces the previous 1.0 Distribution under the AZXA Namespace and is now in the new BRN Namespace.

The ROI is designed to assist Users in the automatic recording and tracking and maintenance of all Requests for Patient Medical Information Data at the IHS field facility. This package assists in the compliance process of the Privacy Act of 1974 and the new requirements of the Health Insurance Portability and Accountability Act (HIPAA) privacy standards.

Each Disclosure entered into the system is automatically assigned a Sequential Disclosure Number preceded by the ASUFAC Number for that particular site. Multiple Site Parameters can be created under the Management Menu option for tracking individual field Site requests.

The Program tracks the following information:

- Requesting Party;
- Disclosure Record Status (Open/Closed/Hold);
- Type of Disclosure (Medical Record, Other);
- Purpose of the Disclosure (Further Medical Care, Insurance, Attorney,
- Personal, School, Tort, FOIA, Subpoena, Other);
- Detailed Description/pertinent information/Medical Record Date Range;
- Request Priority (Non-Critical, Stat);
- Field Staff Assignment;
- FOIA Requests
- Receiving Parties.

1.2 Enhancements and Modifications

1.2.1 New Reports

- DDL PATIENT Detail Disclosure Log (Cumulative)

- 2ND Print All Disclosures W/2nd and/or 3rd Requests
- CNT Count Closed Disclosures By Purpose/Date Range
- RPW Print Requesting Party Workload by Date Range
- FOIA Print Total Number First Party Requests
- PAGE Print Reproduction Page Costs (By Date Range)
- SUSP Print SUSPEND Disclosures Only (For Date Range)

In addition to the above new reports, a number of the existing reports have been refined to include the patients' Health Record Number and the Confidential Statement Policies.

1.2.2 New Data Entry Features:

- AREQ Enter Additional Request Receipt Dates (2nd/3rd)
- CHG Change Spelling of Requesting Party
- EDT Edit Disclosure Date Initiated Only
- SUDT Enter or Edit Beg/End SUSPEND Dates
- ADDR Enter Patient Address (If different from Pt Reg)

The data entry process now accommodates the population of reproduction costs (Number of pages/cost) and the ability to Suspend Disclosures from printing (based upon a tickler date range). In addition, the data entry process has been refined for easy manipulation and with HIPAA privacy Standards. The reports module has been significantly improved to accommodate these new data entry features.

New Disclosure Request Status are automatically tagged as "Open". Upon complete dissemination of Records to all 'Receiving Parties' the Request Status is automatically tagged as "Closed". All Disclosures are tagged with a Request Priority of "Non-Critical". Selected Records can, then, be tagged later as "Stat", allowing quick and easy access to selected higher-level priority disclosures. Each Disclosure request can also be assigned to a specific field staff, allowing balanced staff workload distribution and tracking.

The ROI Reports Module is designed to assist Users with the management, control, and maintenance of all incoming/completed requests. Utilizing a variety of reports, the User can quickly inquire to the status of a particular Request, obtain a list of all Disclosures for a selected patient or group of patients; Print a list of all 'Open' Disclosures; Print a list of staff workload (By the User who created) and for a particular timeframe; Print all Disclosures by Request Priority; Print Closed Disclosures, etc.

2.0 Installation Notes

Prefix: BRN

Current Version: 2.0

Warning: Read entire notes file prior to attempting any installation.

2.1 General Information

- Make a copy of this distribution for offline storage.
- Print all notes/readme files.
- It is recommended that the terminal output during the installation be captured using an auxport printer attached to the terminal at which you are performing the software installation. This will insure a printed audit trail if any problems should arise.

Special Note: For those sites running the previous version 1.0 (which was in the AZXA Name spacing convention), upon installation of the new 2.0 Package (which is in the BRN Name spacing convention), all existing data will be moved over to the new package through a post init conversion at install.

2.2 Contents of Distribution

- brn_0200.k contains all routines for Distribution
- brn_020i.pdf Release Notes and Installation Guide
- brn_020t.pdf Technical Manual
- brn_020u.pdf User Manual

2.3 Required RPMS Resources (Minimum Software)

Package	Minimum Version
Kernel	8.0 or higher
VA FileMan	21.0 or higher
XB Utilities	V3.0

3.0 Installation

For those sites running the previous version 1.0 (which was in the AZXA Name space), upon installation of the new 2.0 Package (which is in the BRN Name space). All existing data will be moved over to the new package through a post init conversion routine at time of install. The Site Parameter will be populated to document the conversion has been successfully completed for all sites. All old AZXA Menu Options will also be removed from the system. The AZXA Globals will remain in tact, should installation problems arise.

3.1 Installation Steps

1. If the ROI program (Version 1.0) in the AZXA Namespace was previously installed at your site, do the following:
 - a. Disable the AZXAMENU Menu option (Previous Namespace)
 - b. Do a Routine Save of all AZXA* routines – D ^%RS
 - c. Do a Routine Delete of all AZXA* routines – D ^%DEL
 - d. Do a Global Save of all ^AZXA* Globals - D ^%GS
2. If the ROI program (Version 2.0) in the BRN Namespace was previously installed at your site, do the following – If this is a first time install, ignore this step:
 - a. Disable the BRNMENU Menu option (Previous Namespace)
 - b. Do a Routine Save of all BRN* routines – D ^%RS
 - c. Do a Routine Delete of all BRN* routines – D ^%DEL
 - d. Do a Global Save of all ^BRN* Globals - D ^%GS
3. Under the Kernel Installation & Distribution System Menu [XPD MAIN], use option Load A Distribution:
 - a. Enter Host File: brn_0200.k
 - b. *Use option “Build File Print of KIDS Utilities submenu to print and review components of this distribution.
 - c. Install the Package:
 - d. Select Install Name: Release of Information Sytem 2.0
 - e. Want to DISABLE Scheduled Options, Menu Options & Protocols? YES//
NO
 - f. Device: Home//

- g. After the installation is complete, use option Install File Print of the KIDS Utilities submenu to print and review the installation process.

3.2 Sample Install

```
Select Installation Option: 1 Load a Distribution
Enter a Host File: /usr/spool/uucppublic/brn_0200.k

KIDS Distribution saved on Jan 30, 2003@08:12:39
Comment: RELEASE OF INFO SYSTEM VS 2.0

This Distribution contains Transport Globals for the following Package(s):
  RELEASE OF INFORMATION 2.0
Distribution OK!

Want to Continue with Load? YES//
Loading Distribution...

Build RELEASE OF INFORMATION 2.0 has an Enviromental Check Routine
Want to RUN the Environment Check Routine? YES// YES
  RELEASE OF INFORMATION 2.0
Will first run the Environment Check Routine, BRNPRE

Hello - Checking system requirements....
FileMan OK..
Kernel OK...

NEW INSTALL

Use INSTALL NAME: RELEASE OF INFORMATION 2.0 to install this Distribution.

Select INSTALL NAME: RELEASE OF INFORMATION 2.0          Loaded from Distribution
  Loaded from Distribution 1/30/03@08:42:36
  => RELEASE OF INFO SYSTEM VS 2.0 ;Created on Jan 30, 2003@08:12:39

This Distribution was loaded on Jan 30, 2003@08:42:36 with header of
  RELEASE OF INFO SYSTEM VS 2.0 ;Created on Jan 30, 2003@08:12:39
It consisted of the following Install(s):
RELEASE OF INFORMATION 2.0
Checking Install for Package RELEASE OF INFORMATION 2.0
Will first run the Environment Check Routine, BRNPRE

Hello - Checking system requirements....
FileMan OK..
Kernel OK...

NEW INSTALL
Install Questions for RELEASE OF INFORMATION 2.0

Incoming Files:

  90264      ROI LISTING RECORD

  90264.1    ROI LISTING REC PARTY

  90264.2    ROI LISTING PARAMETER

  90264.3    ROI LISTING DEPARTMENT

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES// NO
Enter the Device you want to print the Install messages.
```

```
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//
RELEASE OF INFORMATION 2.0

  Install Started for RELEASE OF INFORMATION 2.0 :
        Jan 30, 2003@08:45:28

Build Distribution Date: Jan 20, 2003

Installing Routines:
        Jan 30, 2003@08:45:29

Running Pre-Install Routine:                25                50                75

Now checking dictionary names and data globals.
  Checking 90264
    Not in ^DIC or ^DD.  Removing from ^UTILITY("XBDSET").
  Checking 90264.2
    Not in ^DIC or ^DD.  Removing from ^UTILITY("XBDSET").
  Checking 90264.3
    Not in ^DIC or ^DD.  Removing from ^UTILITY("XBDSET").
  Checking 900264.1
    Not in ^DIC or ^DD.  Removing from ^UTILITY("XBDSET").

DONE

Installing Data Dictionaries:
        Jan 30, 2003@08:45:29

Installing PACKAGE COMPONENTS:

Installing SECURITY KEY

Installing PRINT TEMPLATE

Installing SORT TEMPLATE

Installing INPUT TEMPLATE

Installing PROTOCOL

  Located in the BRN (IHS RELEASE OF INFORMATION) namespace
  Located in the BRN (IHS RELEASE OF INFORMATION) namespace
  Located in the BRN (IHS RELEASE OF INFORMATION) namespace
  Located in the BRN (IHS RELEASE OF INFORMATION) namespace

Installing LIST TEMPLATE

Installing OPTION
        Jan 30, 2003@08:45:32

Running Post-Install Routine: ^BRNPOST

Conversion of Site Parameters Completed!
Conversion of Table File Completed!
Conversion of Record File Completed!

Conversion of all 3 Globals successfully Completed

I WILL NOW POPULATE THE File Conversion Field of the ROI Site Parameters File.

END OF THE POPULATION OF THE CONVERSION DOCUMENTATION

I WILL NOW REINDEX THE AP CROSS REFERENCE
```

FINSIHED WITH CROSS REFERENCE!

The preinit for this package will delete all options, templates (sort, input, list, and print), forms, bulletins, functions, protocols, and help frames namespaced 'AZXA' that are currently in this UCI.

Do you want to continue? Yes// (Yes)

Now deleting `AZXA' namespaced SORT TEMPLATES...

- AZXA CONGRESSIONAL SORT
- AZXA CONGRESSIONAL SORT 2
- AZXA CONGRESSIONAL/STATUS
- AZXA DISCLOSURE DATE
- AZXA GS ACCOUNTING SORT
- AZXA GS AGING RPT
- AZXA GS MASTER LOG SORT
- AZXA JCK DISCLOSURE RECORD
- AZXA JTP DISCLOSURE SORT
- AZXA JTP LOG
- AZXA JTP SORT 2
- AZXA OPEN STATUS
- AZXA SORT DT/USER INITIATED
- AZXA SORT REQ REC PARTY
- AZXA TIME FRAME

Now deleting `AZXA' namespaced PRINT TEMPLATES...

- AZXA DISCLOSURE INFO
- AZXA DT RANGE
- AZXA DTRANGE
- AZXA GS ACCOUNTING HEADER
- AZXA GS ACCOUNTING RECORD
- AZXA GS AGING RPT
- AZXA GS PRINT DISCLOSURE LOG
- AZXA GS RPT DISCLOSURE LOG
- AZXA JCK DICLOSURE
- AZXA JCK DISCLOSURE LOG
- AZXA JCK SORT
- AZXA JTP ADDRESS LOG
- AZXA JTP DISCLOSURE
- AZXA JTP DISCLOSURE #2
- AZXA JTP DISCLOSURE 2
- AZXA PRIORITY REQUEST
- AZXA RPT CONGRESSIONAL
- AZXA RPT DISCLOSURE
- AZXA TONI DISCLOSURE
- AZXA USER

Now deleting `AZXA' namespaced LIST TEMPLATES...

- AZXA RECORD DISPLAY

Now deleting `AZXA' namespaced INPUT TEMPLATES...

- AZXA BRANCH 3
- AZXA DELETE DISCLOSURE
- AZXA DISCLOSURE INPUT
- AZXA GS INPUT DATA
- AZXA INPUT ALL DATA
- AZXA J DISCLOSURE RECORD
- AZXA JCK BRANCH
- AZXA REQ REC INPUT
- AZXA REQUEST STATUS
- AZXA SITE PARAMETER

Now deleting `AZXA' namespaced FORMS...

Now deleting `AZXA' namespaced OPTIONS...

- AZXA DE ADD NEW RECORD

```
AZXA DE ADD REQUEST
AZXA DE DELETE RECORD
AZXA DE DISCLOSURE
AZXA DE INPUT ALL DATA
AZXA DE MENU
AZXA DE STATUS
AZXA GS AGING RPT
AZXA GS AGING1 RPT
AZXA GS MAST LOG
AZXA GS PATIENT ACCOUNTING REC
AZXA JCK DISCLOSURE
AZXA JCT NEXT DISCLOSURE
AZXA JTP AGING RPT
AZXA JTP DISCLOSURE ACCOUNTING
AZXA JTP MASTER LOG
AZXA MGT INPUT REQ/REC PARTY
AZXA MGT INQUIRE
AZXA MGT MENU
AZXA MGT PRINT REQ/REC PARTY
AZXA PATIENT ACCOUNTING REC
AZXA PT CUMMULATIVE RECORD
AZXA RPT CONGRESSIONAL REQUEST
AZXA RPT DISCLOSURE RECORDS
AZXA RPT INQUIRY
AZXA RPT MENU
AZXA RPT OPEN STATUS
AZXA RPT PRIORITY REQUEST
AZXA RPT USER WORKLOAD
AZXA SITE PARAMETER
AZXAMENU
```

Now deleting `AZXA' namespaced BULLETINS...

Now deleting `AZXA' namespaced HELP FRAMES...

Now deleting `AZXA' namespaced COMPUTED-FIELD FUNCTIONS...

Now deleting `AZXA' namespaced PROTOCOLS...

```
AZXA NEXT SCREEN
AZXA PREVIOUS SCREEN
AZXA QUIT
AZXA RECORD DISPLAY
```

Do you want to remove any 'Dangling Pointers' from your OPTION File? Y//**YES**

```
PLEASE WAIT while I check this out . . .
Option AKMOCORE points to missing option 16532
Your OPTION File is OK now (1 pointer fixed).
```

```
Be sure to give users a new primary menu option if one of the menu options
deleted within this namespace had been used as a primary menu option.
INSTALLATION OF THE ROI PROGRAM IS SUCCESSFULL
IF FIRST TIME INSTALL THE SITE PARAMETERS MUST BE COMPLETED PRIOR TO RUNNING
PROGRAM
```

Updating Routine file

Updating KIDS files

```
RELEASE OF INFORMATION 2.0 Installed.
      Jan 30, 2003@08:46:06
```

NO Install Message sent

Call MENU rebuild^[[1;1H

Rebuilding Menus

Starting Menu Rebuild: Jan 30, 2003@08:46:06

```
Collecting primary menus in the New Person file...

          Primary menus found in the New Person file
-----
OPTION NAME      MENU TEXT                # OF      LAST      LAST
                   USERS                USED      BUILT
AKMOEVE         IHS Kernel                8         09/12/02  01/29/03

Building the Common Options (XUCOMMAND)....
Building secondary menu trees....
Menu Rebuild Complete:  Jan 30, 2003@08:46:09
Install Completed
```

Figure 3-1: Sample install of BRN V 2.0

4.0 Post-Installation

Before continuing with this section, all steps identified in section 3.0 should have been successfully performed. Notify Users of the ROI package of this new RPMS Distribution.

4.1 Allocating Security Keys

The following security keys must be assigned. Assign access to the system to appropriate users. You should work with the staff when assigning these keys.

Security Key	Description
BRNZMENU	Main Menu Key
BRNZEDIT	Data Entry Key
BRNZDELETE	Delete Disclosure Key
BRNZMGR	Site Parameter Key

4.2 Update Site Parameters

The ROI Site Parameters file allows you to customize the ROI at your facility. Respond to the site parameter prompts that appear during the installation process. These parameters may be modified at a later time as needed. Information for each prompt is provided here. For more detailed information and instructions on modifying these parameters, please refer to the ROI User Manual.

```

Facility: Enter your site facility name

FACILITY NAME: CIBECUE// (No Editing)
DISCLOSURE COUNTER NUMBER: 0// (No Editing)
UNIVERSAL/SITE SPECIFIC: UNIVERSAL//
FILE CONVERSION COMPLETED: 1// (No Editing)
PROMPT FOR DEPARTMENT: This field will be utilized in future Distributions
                        **Do not populate, as Departments will not be entered**

```

Figure 4-1: Setting up site parameters

5.0 Contact Information

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

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov