



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Electronic Health Record

(EHR)

Patch Guide

Version 1.0 Patch 19
August 2016

Office of Information Technology (OIT)
Albuquerque, New Mexico

Table of Contents

1.0	Introduction.....	1
1.1	Orientation	1
1.1.1	Features	1
1.1.2	Buttons	2
1.1.3	Check Boxes	3
1.1.4	Columns	3
1.1.5	Problem Details Window	4
2.0	IPL Tasks.....	6
2.1	Adding an Integrated Problem List (IPL).....	6
2.2	Adding Visit Instructions/Goal Notes/Care Plan Activities.....	14
2.3	Editing an Integrated Problem List (IPL)	18
2.3.1	Problem Status	21
2.4	Deleting an Integrated Problem List (IPL).....	21
3.0	Status Tabs	22
3.1	Tabs.....	22
3.1.1	Core Problems Tab	22
4.0	Date of Onset	24
5.0	Purpose of Visit (POV)	25
5.1	Update POVs.....	25
5.2	Asthma Control Prompt	25
6.0	Using the PickList Button	36
6.1	Selecting Problems from a PickList	36
6.2	Managing PickLists.....	38
6.2.1	Edit PickList Button.....	48
6.2.2	Updating a PickList.....	56
7.0	IPL Cleanup.....	58
7.1	Updating Problems to Chronic, Routine/Admin, and Social/Environmental Status.....	58
7.1.1	Status Update Selection Descriptions	58
7.2	Instructions for Setup of Automated Inactivation of Episodic Status.....	58
7.2.1	Set EHR Parameter.....	59
7.2.2	Execute the APCD EPISODIC CLEANUP TASK	59
8.0	Parameters.....	61
8.1	BGO IPL INACTIVATE TIMEFRAME	61
8.2	BGO IPL Eye DX	61
	Contact Information	62

Preface

This manual is designed to inform Integrated Problem List (IPL) users with the changes that have been implemented in EHR Patch 19.

1.0 Introduction

This manual is designed to inform Integrated Problem List (IPL) user with the changes that have been implemented in EHR Patch 19.

The IPL enables the convenient viewing of Problem List data on a main display, including:

- Status
- Onset Date
- Priority
- Provider Narrative
- Comments
- If the problem was added to the patient's personal history
- If the problem is pregnancy related
- If the problem was used for an inpatient
- ICD code

1.1 Orientation

At the top of the Problem List window of the IPL component are the following features, buttons, check boxes, and columns, which have the following functionality:

Status	Onset Date	Priority	Provider Narrative	Comments	Pfx	PIP	IP	POV	ICD
Episodic	01/31/2014	1	Pregnancy and insulin-dependent diabetes mellitus text here	normal pregnancy					648.00 250.01
Episodic			Wheezing						786.07
Chronic	05/27/2014	1	Pain please get lots of rest	this is the second comment					780.96
Episodic			Appendicitis						541
Episodic			Scalp laceration						873.0
Sub-acute			Facial laceration						873.40
Episodic			Laceration of hip						890.0
Episodic			Chart evaluation by healthcare professional						.9999
Chronic			Ketoacidosis in type II diabetes mellitus						250.10
Sub-acute	08/25/2013	1	Acute gastritis provider text						535.00

Figure 1-1: IPL Problem List Main Window

1.1.1 Features

- An asterisk in the Provider Narrative column indicates problems that are not SNOMED are encoded.
- Briefly rest the mouse pointer over the code in the ICD column to view a window of the map source advice, based on the SNOMED CT code.

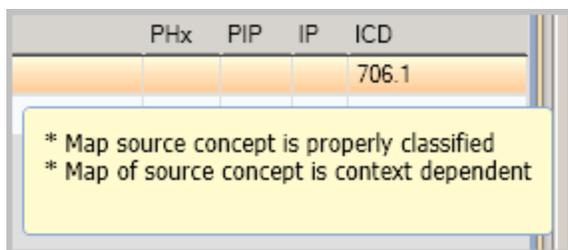


Figure 1-2: Map Source

- For problems with a non-coded SNOMED code, the Edit and POV buttons are disabled.
- Viewing Problem Details – Double-click anywhere in a line item to view the Problem Details window.
- Right-Click Menu – Right-click anywhere on a line item to open the right-click menu. Select from:
 - **Delete:** To delete the line item.
 - **Edit:** To edit the line item. Opens the Edit Problem dialog box.
 - **Get SCT:** To update a historical ICD 9 entry. Opens the SNOMED CT Lookup dialog box.
 - **POV:** To flag an outpatient problem as POV and to flag an inpatient problem as used for inpatient.
 - **Change Status:**
 - Chronic
 - Episodic
 - Sub-acute
 - Personal History
 - Inactive
 - Social/Env

1.1.2 Buttons

- Expand All/Collapse All button: Enables the user to expand or collapse all problems to view the care planning activity.
- Ed button: Click this button for a direct link to MedlinePlus.
- Clinical Decision Support button: Click this button for a direct link to UpToDate.
- Get SCT button: Click this button to look up the SNOMED CT code.
- POV button: Click the POV button to mark the problem as the purpose of visit and to add visit, care plan, or goal activity data.

- Pick List button: Click the Pick List button to select SNOMED CT descriptions by defined pick lists.
- Add button: Click this button to add a problem.
- Edit button: Click this button to edit an existing problem.
- Delete button: Click this button to delete a selected problem.

1.1.3 Check Boxes

Select a check box (or multiple check boxes) to filter the problem list(s) associated with that status.

- Chronic
- Social/Env
- Episodic
- Inactive
- Sub-acute
- Current/Most Recent Inpatient

1.1.4 Columns

Columns on the main display window can be sorted by clicking the column heading, added or removed by the user, made wider or narrower by dragging the column heading, and set as personal setting.

The default sort for columns is by default to Priority, Status, and then ProviderNarrative. The default sort can be recalled by clicking the + column header.

Status	Onset Date	Priority	Provider Narrative	Comments	Freq	Phx	PIP	IP	POV	ICD
Chronic			Pain at rest due to peripheral vascular disease pain	adding a comment :	5					I73.9 R52
Episodic	03/21/2016		Chart evaluation by healthcare professional		6					Z02.9
Episodic			Fracture dislocation of foot joint		4					Z22.999
Episodic			Secondary hypertension		2					I15.9
Episodic			Elevated blood-pressure reading without diagnosis of hypertension		1					R03.0
Episodic			Essential hypertension complicating AND/OR reason for care during puerperium		1					O10.03

Figure 1-3: IPL Columns Window

- Plus or Minus Sign: Clicking this sign opens the Care Planning information.
- Status Column: Contains one of the following statuses, as selected by the user.
 - **Chronic**
 - **Social/Env**
 - **Episodic**

- **Inactive**
- **Sub-acute**
- **Current/Most Recent Inpatient**
- Onset Date Column: Contains the date of the problem's onset, as input by the user (optional).
- Priority Column: Contains the priority level, as set by the user.
- Provider Narrative Column: Contains the data input by the user in the Provider Text field.
- Comments Column: Shows any comments typed by the user.
- Freq Column: Displays the frequency or number of times
- PHx Column: A check mark in the PHx column indicates if the Personal History option was selected and the problem was added to the patient's personal history.
- PIP Column: A check mark in the PIP (Pregnancy Issues and Problems) column indicates if the Pregnancy Related option was selected.
- IP Column: A check mark in the IP column indicates if the Use for Inpatient option was selected.
- POV Column: If the problem is used as POV (purpose of visit) by clicking Save as POV, a red check mark displays in the POV column.
- ICD Column: Indicates the mapped ICD code from the selected SNOMED term.

1.1.5 Problem Details Window

Double-click anywhere in the IPL window to open the **Problem Details** dialog box. This dialog box is informational only and provides problem data.



Figure 1-4: Problem Details Window

2.0 IPL Tasks

2.1 Adding an Integrated Problem List (IPL)

To add an IPL to a patient record, complete the following steps:

1. On the main IPL screen, click the **Add** button. The **Add Problem** dialog box opens.

Figure 2-1: Initial Add Problem Dialog Box

Notes: A visit is not required to view the IPL details; however, a visit must be selected to enable the Add button.

The Problem ID field is system populated.

2. Select the **Pregnancy Related** check box, if applicable. The Pregnancy Related check box is only available for female patients.
3. Select the **Use for Inpatient** check box, if applicable. The Use for Inpatient check box is only available for inpatients.
4. Select the **Use as POV** check box, if applicable. The POV check box is available only for outpatients.

Note: If Use as POV is selected, and if any fields have been changed or added, an information message appears, advising the user that the problem has been stored, if new, or updated, if edited. The problem is stored as Reviewed and Updated in the V Reviewed/Updated file and a red check mark appears in the POV column of the IPL main window. Inactive problems may be POV.

5. Populate the **SNOMED CT** field using one of the following methods:

SNOMED CT Field

- a. Type a term in the **SNOMED CT** field, and then press Enter or click the Ellipsis (⋮) button. The **SNOMED CT Lookup** dialog box opens with your term populated in the **Search** field and a list of IHS SNOMED terms.

- b. If you want to search all SNOMED terms, in the initial **Add Problem** dialog box, leave the **SNOMED CT** field blank and click the Ellipsis button. The **SNOMED CT Lookup** dialog box opens.

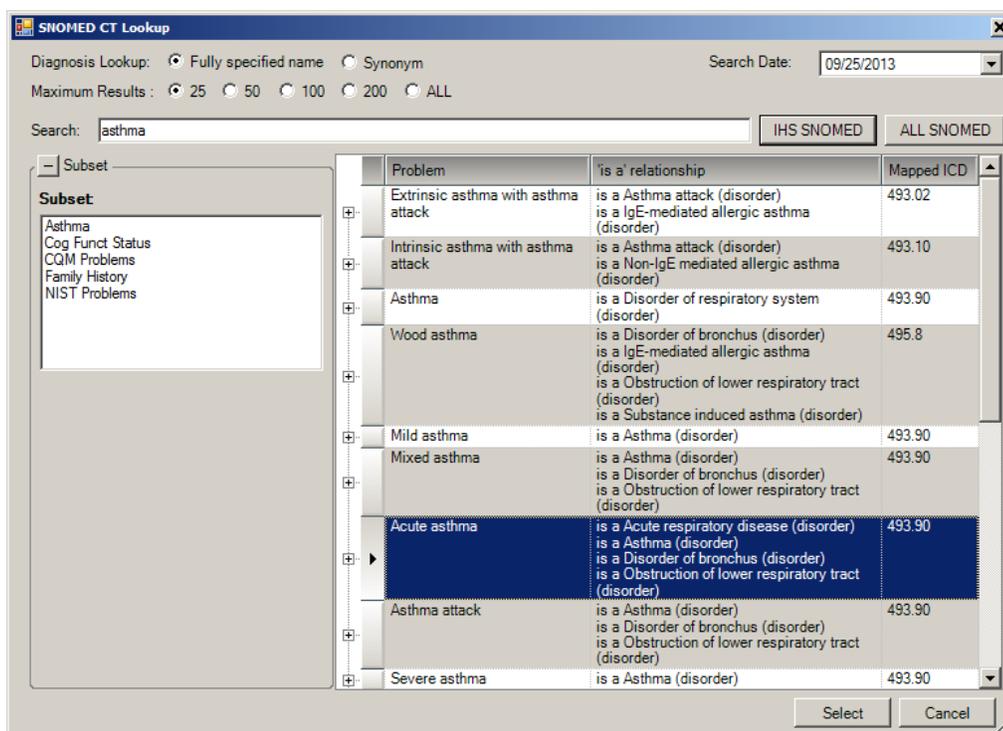


Figure 2-2: SNOMED CT Lookup Dialog Box

- c. In the **SNOMED CT lookup** dialog box, in the **Diagnosis Lookup** section, select either the **Fully-specified name** or **Synonym** option button.
- Fully specified name returns a collapsed list of SNOMED CT terms. Click the Expand button (⊕) next to the term to expand and view the child entries.
 - Synonym returns the full list of SNOMED CT terms.
- d. In **Maximum Results**, click one of the following option buttons to limit the number of results (or click **ALL**):
- **25**
 - **50**
 - **100**
 - **200**
 - **ALL**
- e. In **Search**, type the term to search.
- f. In **Subset**, you can select a subset to search for, if needed.

- g. In **Search Date**, the field defaults to the current date. Click the drop-down arrow to open the calendar and select a different date to search, if needed.
- h. Click either the **IHS SNOMED** or **ALL SNOMED** button. The list of SNOMED CT terms is populated.
- i. Select and highlight a term, and then click the **Select** button. The **SNOMED CT** field of the **Add Problem** dialog box refreshes with the selected SNOMED CT term you selected.

Get SCT Button

1. Click the **Get SCT** button to open the **ICD 10 to SNOMED CT Lookup** dialog.

Pick List Button

2. Click the **Pick List** button to open the **Pick List** dialog box.

After you populate the SNOMED CT code, the **Add Problem** dialog box expands with additional fields.

Figure 2-3: Expanded Add Problem Dialog Box with Asthma

3. In **Priority**, use the up and down arrows to select a priority level.
4. For pregnant patients, the **Pregnancy Related** check box is auto-selected if a problem was created in the Pregnancy and Issues component and saved as POV. A red check mark appears in the PIP column of the IPL main screen in these cases.

5. If primary problem, select the **Primary** check box.

Note: The Primary check box is only visible if the POV has been completed.

6. In **Status**, click the applicable option button:

- **Chronic**
- **Sub-acute**
- **Episodic**
- **Social/Environmental**
- **Inactive**
- **Personal Hx**
- **Routine/Admin**

Note: Chart Review is triggered if you are editing a problem in IPL and the Status of a problem is changed and saved.

7. In **Provider Text**, type any applicable text. (Optional, 60-character limit.)

Note: You can briefly rest your mouse pointer over this field to view an information pop-up.

8. In **Severity**, select one or more of the following:

- **Fatal**
- **Life Threatening**
- **Mild**
- **Mild to Moderate**
- **Moderate**
- **Moderate to Severe**
- **Severe**

9. Click the **Clinical Course Ellipsis** to populate the **Clinical Course** field. The **Select Clinical Courses** dialog box opens.

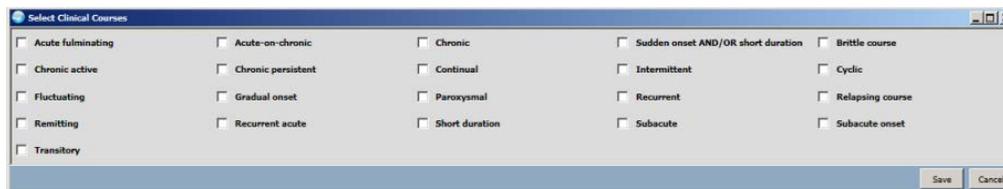


Figure 2-4: Select Clinical Courses Dialog Box

- a. Select one or more courses.
- b. Click **Save**. The **Clinical Course** field updates with your selections.

Note: If you selected an Asthma Subset or the mapped ICD is in the Asthma taxonomy, the Asthma Classification drop-down menu appears below the Qualifiers section.

10. In **Episodicities**, select one of the following from the drop-down menu:

- **First episode**
- **New episode**
- **Old episode**
- **Ongoing episode**
- **Undefined episodicity**

11. Select the applicable Asthma Classification from the drop-down menu.

Notes: The Asthma Classification drop-down menu only appears if an Asthma Subset is selected or the mapped ICD is in the Asthma taxonomy, AND the Use as POV check box was selected.

Only one Asthma Control entry is allowed per visit.

12. In the **Date of Onset** field (optional), type a date in xx/xx/xxxx format or click the Ellipsis button. The **Select Date** dialog box opens. Do one of the following:

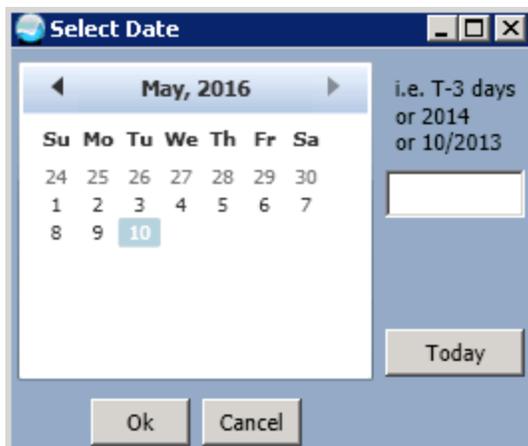


Figure 2-5: Select Date

- Select a date from the calendar, and then click **OK**. The date selected populates in the **Date of Onset** field.
 - Click the **Now** button and then click **OK**. The Date of Onset populates with today's date.
 - In the blank field, type **T-X**, with X indicating number of days passed. The Date of Onset populates with the current date minus the number of days indicated.
13. If applicable, select the **Is Injury** check box. The **Injury** section opens in the **Add Problem** (or **Edit Problem**) dialog box.

Note: The Use as POV check box must be selected for the Is Injury check box to appear. If the problem ICD code points to an injury taxonomy or if an injury-related SNOMED CT is selected, the Is Injury check box is automatically selected and the Injury section expands when the Use as POV check box is selected.

Figure 2-6: Injury Section

- Select either the **First Visit** or **Re-visit** option button, as applicable.
- In **Injury Date**, the date defaults to the current date. Click the Ellipsis button to open the calendar and select a new date or type a new date in the field.
- In **Place**, select a location for where the injury occurred:
 - **Home – Inside**

- **Home – Outside**
 - **Farm**
 - **School**
 - **Industrial Premises**
 - **Recreational Area**
 - **Street/Highway**
 - **Public Building**
 - **Resident Institution**
 - **Hunting/Fishing**
 - **Other**
 - **Unknown**
- d. In **Associated With**, select one of the following from the drop-down menu:
- **Hospital Acquired**
 - **Alcohol Related**
 - **Battered Child**
 - **Employment Related**
 - **Domestic Violence Related**
- e. To populate the **Cause by** field, type an injury term in the field, and then click the Ellipsis button. The **Injury Causes** dialog box opens, showing only E coded items.

Injury Causes

Lookup Option: Lexicon ICD

Search Value:

Select from one of the following items

Code	Description
E815.0	MV COLL W OTH OBJ-DRIVER
E815.1	MV COLL W OTH OBJ-PASNGR
E815.2	MV COLL W OTH OBJ-MOCYCL
E815.3	MV COLL W OBJ-MCYCL PSGR
E815.4	MV COLL W OBJ-ST CAR
E815.5	MV COLL W OBJ-ANIM RIDER
E815.6	MV COLL W OBJ-PED CYCL
E815.7	MV COLL W OBJ-PEDEST
E815.8	MV COLL W OBJ-PERS NEC

Figure 2-7: Injury Causes with E Codes Dialog Box

- i. In **Lookup Option**, click either the **Lexicon** or **ICD** option button.
 - ii. In **Search** value, type a different search value if your initial search did not return the applicable injury item, and then click **Search**. The returned results list shows a list of E Code items with their description.
 - iii. In the returned results list, select the applicable item, and then click **OK**. Your selection shows in **Caused By** in the Injury section.
14. Type a comment in the **Comments** section, if needed.
 15. If the Use as POV check box was selected, the **Add Visit/Care Plan/Goal Activities** button is active. To add data, click the **Add Visit/Care Plan/Goal Activities** button. The **Add Visit Instructions/Care Plan Activities** dialog box opens.
 - Entries in this section preceded by an S indicate the Goal Note, Care Plan, or Visit Instructions have been signed. Entries preceded by a U indicate the entry is unsigned.
 16. Click **Save** in the top-right of the **Add Problem** dialog box. Your data is saved to the Integrated Problem List grid.

Note: Selecting the Use as POV check box (outpatients only) also saves (stores) the problem in the V Reviewed/Updated file.

2.2 Adding Visit Instructions/Goal Notes/Care Plan Activities

When Adding or Editing an Integrated Problem List, if the Use as POV check box is selected, the Add Visit/Care Plans/Goal Activities button is enabled for adding, inactivating, or deleting visit instructions, goals, or Care Plan information.

Add Visit Instructions / Care Plans / Goal Notes / Care Planning Activities

Visit Instructions

Date: 10/31/2013
FUNCTIONAL ASSESSMENT

Goal Notes

Date: 10/31/2013
Type Goal Notes here.

Care Plans

Date: 10/31/2013
Type Care Plan notes here.

Patient Education provided

Disease Process Nutrition
 Exercise Lifestyle Adaptation
 Medications Prevention

Comprehension Level: FAIR
Length: 30 (min)
Readiness to Learn: EAGER TO LEARN

Treatment/Regimen/Follow-up

Current Visit - Care Planning Activities

Treatment/Regimen/Follow-up

Follow-up 1 day
Follow-up 4-6 months

Education Provided

Had DISEASE PROCESS Education.
Comprehension Level: FAIR
Length: 30 mins
Readiness to Learn: EAGER TO LEARN

OK Cancel

Figure 2-8: Add Visit Instructions/Care Plan/Goal Notes/Care Planning Activities Dialog Box

1. In the Visit Instructions, Goal Notes, or Care Plans sections:
 - a. In the Visit Instructions, Goal Notes, or Care Plans field, type a free-text comment, or click the Template button () to select a template. The Templates List opens.

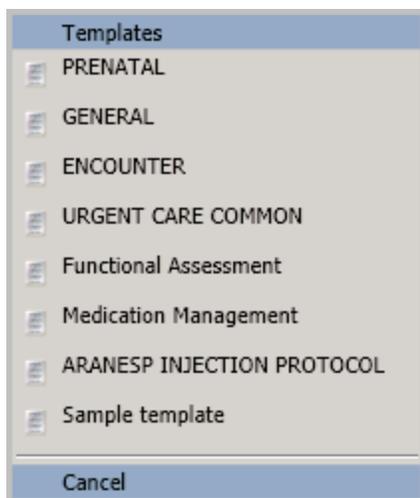


Figure 2-9: Templates List

- b. Select a template. The template window opens. Make any necessary changes, and then click **OK**. Your selected template name appears in the Visit Instructions, Goal Notes, or Care Plans field, as selected.

Note: You can also click the Preview button to view how the template will appear. The Medication Management Template in the Visit Instructions is shown as an example, below.

Figure 2-10: Medication Management Template

- c. Repeat steps a and b for the other fields, as needed.
2. In the **Patient Education** provided section, complete the following:
 - a. Select one or more of the education check boxes.
 - b. In **Comprehension Level**, select one of the following from the drop-down menu:
 - **Poor**
 - **Fair**
 - **Good**
 - **Group-No Assessment**
 - **Refused**
 - c. In **Length**, type the length in minutes.
 - d. In **Readiness to Learn**, select one of the following from the drop-down menu:
 - **Distraction**

- **Eager to Learn**
- **Intoxication**
- **Not Ready**
- **Pain**
- **Receptive**
- **Severity of Illness**
- **Unreceptive**

Your selections show in the Education Provided section.

3. If treatment, regimen, or follow-up is needed, click the **Treatment/Regimen/Follow-up** button. The **Treatment/Regimen** dialog box opens.



Figure 2-11: Treatment/Regimen Dialog Box

- a. Click the Expand button (+) on an item in the list to expand the list.

Note: The Treatment/Regimen dialog contains multiple TREG pick lists, organized alphabetically.

- b. Select one or more treatment, regimen, or follow-up items.
- c. Click **OK**. Your selections show in the Treatment/Regimen/Follow-up section.
4. Click **OK**. The **Review/Sign Changes for Patient Name** opens, showing a list of the items you added or changed. Sign by adding your Electronic Signature.

Note: Click **Cancel** from the Add Visit Instructions/Care Plan/Goal Notes/Care Planning Activities Dialog Box or the Review/Sign Changes dialog box to delete your changes.

Figure 2-12: Review/Sign Changes for Patient Name

The Add/Edit screen for IPL contains the same functionality.

Add, Replace/Edit, Inactivate, and Delete are actionable for Goal Notes and Care Plans. Only Add and Delete are actionable for Visit Instructions. User is not allowed to inactivate a visit instruction. Only the Chief MIS and the owner of the note can delete.

2.3 Editing an Integrated Problem List (IPL)

To edit an IPL, follow these steps:

1. Select a visit.
2. Select a problem from the **Problem List** on the main IPL screen.

Note: A visit and a problem must be selected in order for the Edit button to become active.

- Click the **Edit** button. The **Edit Problem** dialog box opens.

Figure 2-13: Integrated Problem Maintenance - Edit Problem Dialog Box

Note: Users can enter an imprecise date for the Injury Date via PCC Data Entry Staff menu. The imprecise date displays as just the month and year. Once an imprecise date is entered, the user cannot change it.

If the problem currently exists in the patient's Problem List, the problem will open in the Add/Edit dialog box.

- Edit fields as applicable.

Note: A SNOMED CT code must be selected in order to save your changes.

- In the Comments section, you can add or delete comments.
 - To add comments:

- i. Click the **Add** button. The **Add Comment** dialog box opens.

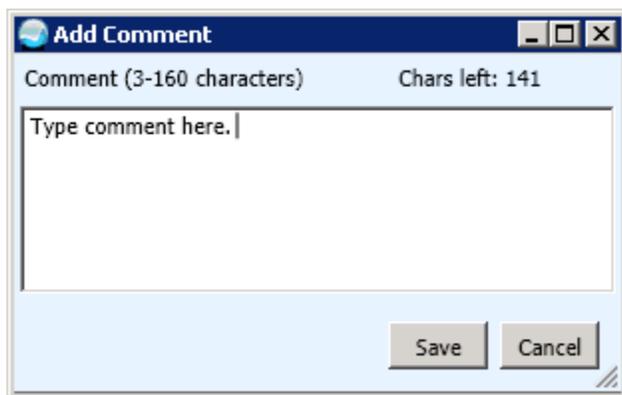


Figure 2-: Add Comment Dialog Box

- ii. In the **Comment** field, type a comment of 3-160 characters.
- iii. Click **Save**. Your comment appears in the Comments section, with a number automatically assigned and shown in the # column, your comment in the Narrative column, the date entered in the Date column, and the logged in user name in the Author column.

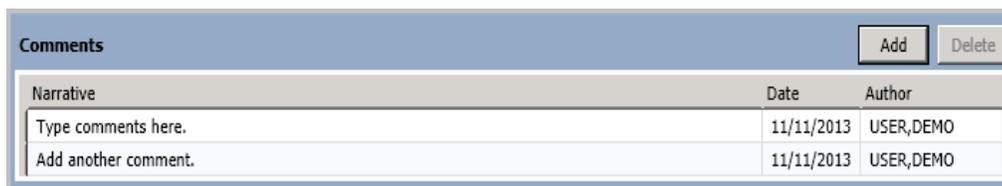


Figure 2-14: Comments List

- b. To delete comments:
 - i. Select one or more comments you want to delete. The line items are highlighted and the Delete button becomes active.
 - ii. Click the **Delete** button. The following message appears:

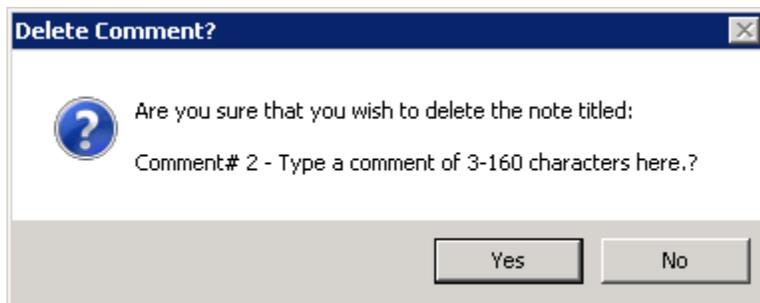


Figure 2-15: Delete Comment Confirmation Message

- iii. Click **Yes**. Your comment no longer appears in the list.

6. Click **Save** in the top-right of the **Add Problem** dialog box.

Notes: Clicking the Use as POV check box (outpatients only) also saves (stores) the problem in the V Reviewed/Updated file. If data in any fields has been updated, a message displays warning that the problem has been stored if new, or updated if edited.

When editing a problem, clicking Save or selecting the Use as POV check box saves (stores) the problem only if any fields have been changed.

2.3.1 Problem Status

The status stored for a new problem, or edited Inactive problem, shall be inherited from default status for the selected SNOMED term set in Digital Terminal Status (DTS).

For an Active problem, a dialog box displays telling the user what the default status is. The user can click Yes to approve or No if the user does not approve. The system will store the SNOMED term without changing the problem status.



Figure 2-16: Problem Status Dialog

2.4 Deleting an Integrated Problem List (IPL)

Only the Chief MIS or author can delete a problem.

- The visit must be unlocked.
- Problems with any Goal Notes, Care Plan, Visit Instructions, or Treatment/Regimen entries may not be deleted. However, they can be inactivated.
- Problems cannot be deleted if marked as Use as POV or Use as Inpatient.
- Problems may be deleted by one of the following methods:
 - Right-clicking the line-item and then selecting **Delete** from the right-click menu.
 - Selecting the line item and then clicking the **Delete** button on the main screen.

The problem is cleared from the Integrated Problem List grid.

3.0 Status Tabs

3.1 Tabs

Tabs display based on the status of the patient's existing problems. For example, if a problem of Sub-acute exists in the problem list, then the Sub-acute tab displays. The two exceptions are Core Problems and Inactive. Those tabs always display.

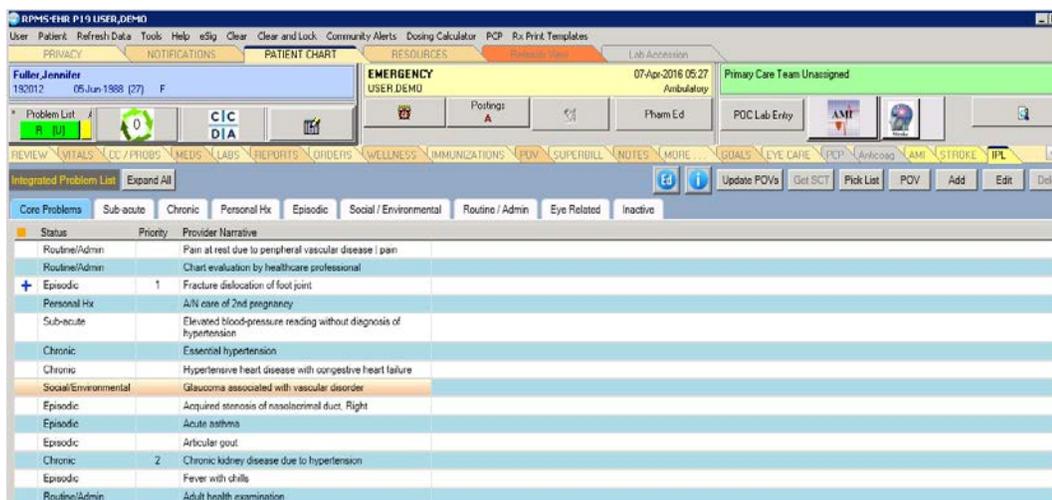


Figure 3-1: Complete List of IPL Tabs

3.1.1 Core Problems Tab

User has the ability to customize the Core Problems tab by selecting what status they want to see. Right-click the **Core Problems** tab to view the Customization menu.

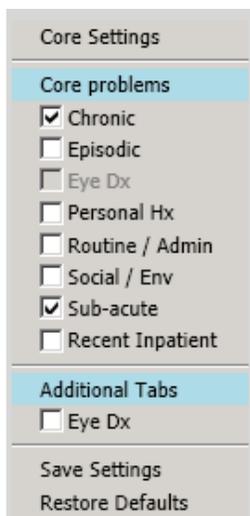


Figure 3-2: Core Settings List

Right-clicking the orange box on the Core tab enables users to customize the columns along the column bar. These settings apply to all tabs and remain in effect after the user logs off.



Figure 3-3: Orange Box Column Settings

4.0 Date of Onset

The Date of Onset field displays the date the first time a symptom became evident.

In the optional Date of Onset field, type a date in xx/xx/xxxx format or click the Ellipsis button. The **Select Date** dialog box opens. Do one of the following:

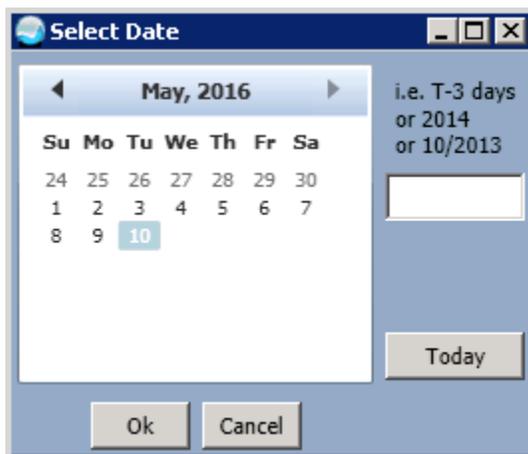


Figure 4-1: Select Date Dialog

- Select a date from the calendar, and then click **OK**. The date selected populates in the **Date of Onset** field.
- Click the **Now** button, then click **OK**. The Date of Onset populates with today's date.
- In the blank field, type **T-X**, with X indicating number of days passed. The Date of Onset populates with the current date minus the number of days indicated.

5.0 Purpose of Visit (POV)

These instructions are for the POV button on the main screen to store the SNOMED CT code for an outpatient visit or inpatient discharge diagnosis marked as Primary.

Note: The POV button is only active for problems without an associated SNOMED CT code. The POV button is not active for problems with an INACTIVE ICD 10 code. Inactive problems may be POV.

5.1 Update POVs

Click the Update POVs button. This brings up all problems that are currently marked as POV for the visit.



Figure 5-1: POV Dialog

Note: If there are no problems marked as POV for the visit, the button is dim and cannot be selected.

5.2 Asthma Control Prompt

Asthma Control can now be selected on the POV dialog for asthma type problems.

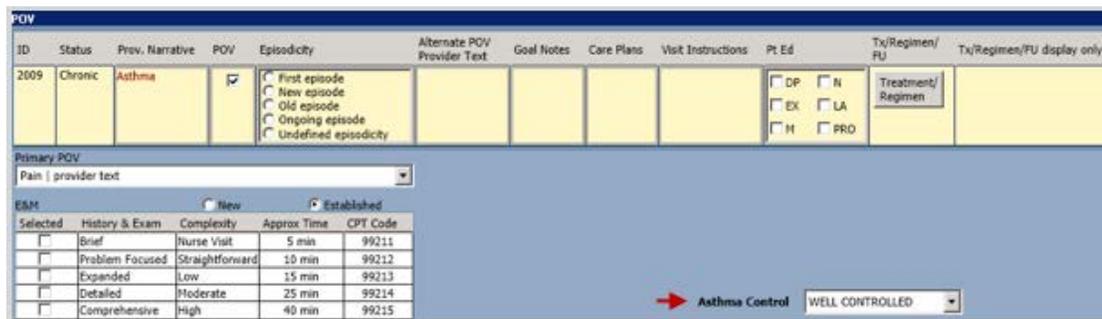


Figure 5-2: Asthma Control Prompt on POV Dialog

Note: An unlocked visit must be selected.

- From the main screen, select one or more problem line-items, and then click the POV button. The POV dialog box opens, which shows the selected problems.

Notes: A red triangle in the upper-right corner of a column indicates there are multiple entries. Click in the column to expand and view the entries.

In instances where there is no existing primary POV, and the POV check box was not selected, the problem is automatically made a primary POV (not secondary POV).

Figure 5-3: POV Dialog Box

- The ID column shows a system-generated ID.
- The Status column shows the selected status for the problem.
- The Prov. (Provider) Narrative column contains SNOMED concept description and provider text.
- The next column either shows a POV or INPT column and check box to indicate if the problem is POV or for an inpatient. Clear the check box if you no longer want to set the problem as POV or use for inpatient.

Note: The POV check box can only be selected if a SNOMED CT code has been applied to the problem.

- The Episodicity column contains the following option buttons. Select or clear them as applicable:
 - **First episode**
 - **New episode**
 - **Old episode**
 - **Ongoing episode**
 - **Undefined episodicity**
- The following columns have a right-click menu:

- **Alternate POV Provider Text**
- **Goal Notes**
- **Care Plans**
- **Visit Instructions**

8. Right-click in the column to view the following options:

Note: Only the available options for a particular column are active in the right-click menu, depending on the column selected. Various examples are provided below.



Figure 5-4: POV Right-Click Menu

- **Add:** The **Add** dialog box opens. Type your text and click **OK**. The text shows in the column.

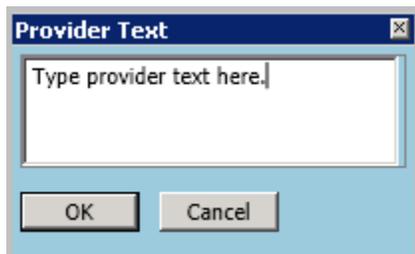


Figure 5-5: Provider Text Dialog

- **Replace:** The Replace function is used to edit existing text. A dialog showing the original text opens. Type the edited text in the **Replacing Text** field and click **OK**. The edited text displays.

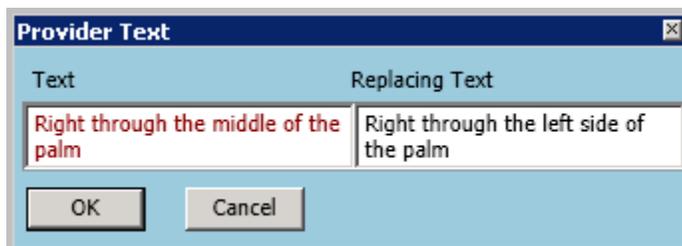


Figure 5-6: Replace Dialog Box

- **Sign:** The **Review/Sign** dialog box opens with a list of the items you added for you to sign. Type your electronic signature, and then click **OK**.

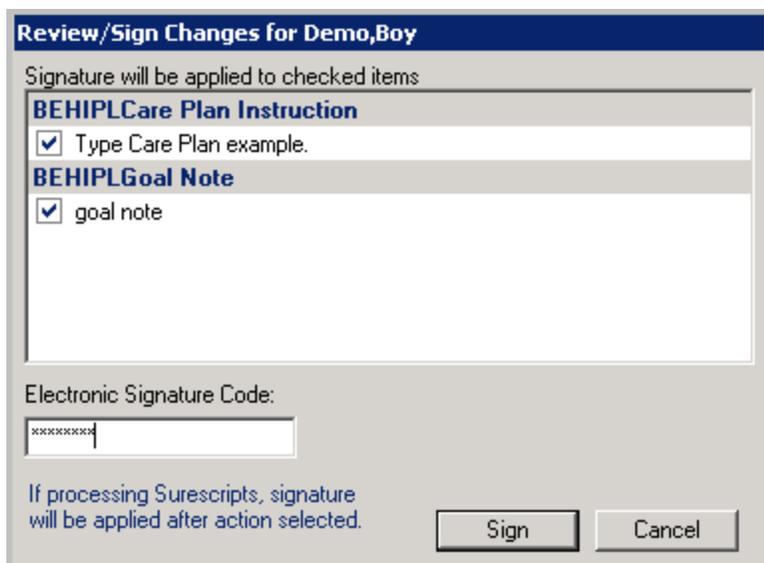


Figure 5-7: Review/Sign Changes for Patient Name for POV

- Inactivate:** This functionality is intended to inactivate the existing goal or care plan, and initiate a new one. Use this if you want to retain the information for future reference. It will not be seen in the general IPL display, but can be displayed on an RPMS report. Type a comment, and then click **Yes**.

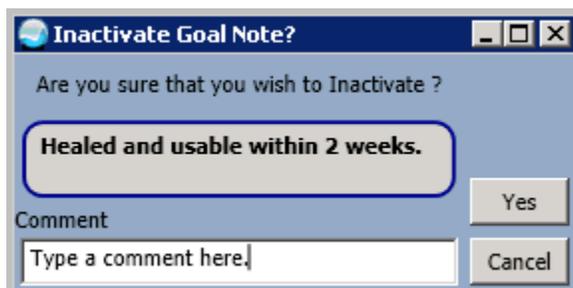


Figure 5-8: Inactivate Item Dialog Box

- Delete:** The **Delete** dialog box opens to confirm your deletion. Click **OK**.

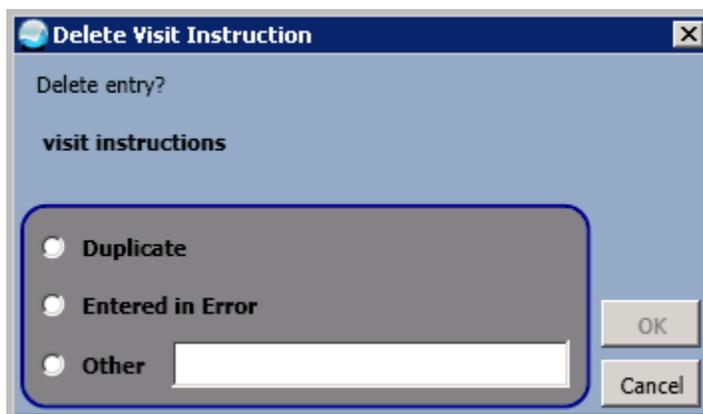


Figure 5-9: Delete Confirm Dialog Box

9. Add any free-text information in the **Prov. (Provider) Text** field by selecting **Add** from the right-click menu. The **Provider Text** dialog box opens:

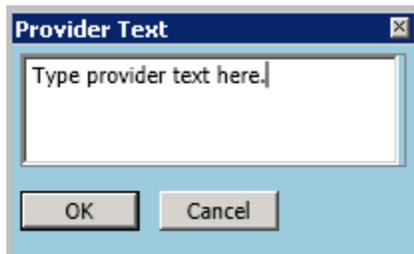


Figure 5-10: Provider Text Dialog Box

- a. Type provider text to include more detail regarding the problem for TODAY'S ENCOUNTER only. So the provider text here is stored only to the Provider Text for the Visit Diagnosis provider narrative.
 - b. Click **OK**. If Provider Text already exists, the Replace item will be active in the right-click menu. The Provider Text dialog box with (existing) Text and Replacing Text fields opens:
 - i. Type the new provider text in the **Replacing Text** field.
 - ii. Click **OK**. Your change shows in the **Prov. Text** column.
10. The **Goal Notes** column contains goals set for the patient to improve the problem, for example to reduce their cholesterol. You can add a Goal Note by selecting **Add** from the right-click menu. The **Goal Note** dialog box opens.

- Click the Template button () to select a template, if needed.

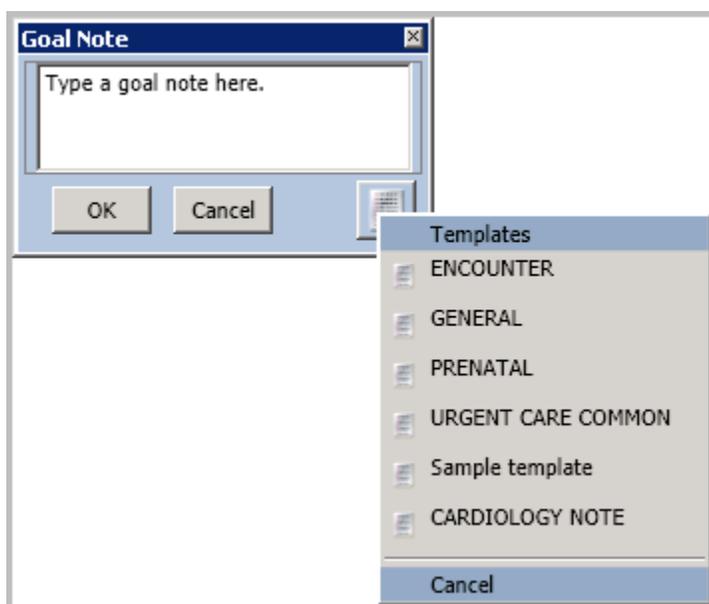


Figure 5-11: Goal Notes Dialog Box with Templates Menu

- You can also type over an existing Goal Note by clicking in (or selecting) the text and making your changes.
11. The **Care Plans** column contains instructions for the patient, for example, walk three times per week, and so on. You can add a Care Plan by selecting **Add** from the right-click menu. The **Care Plan** dialog box opens.
- Click the Template button () to select a template, if needed.

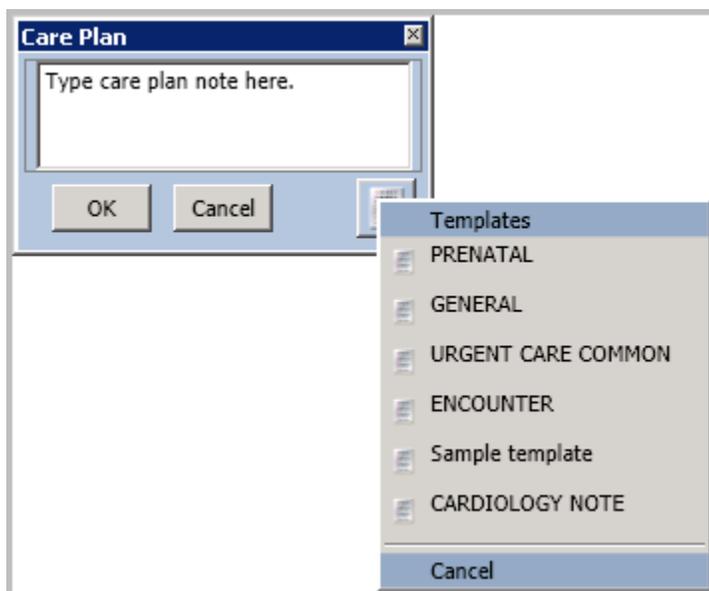


Figure 5-12: Care Plan Dialog Box with Templates Menu

- You can also type over an existing Care Plan by clicking in (or selecting) the text and making your changes.
12. The Visit Instructions column contains patient visit instructions for the selected visit. You can add a Visit Instruction by selecting **Add** from the right-click menu. The **Visit Instruction** dialog box opens. Click the Template button () to select a template, if needed.

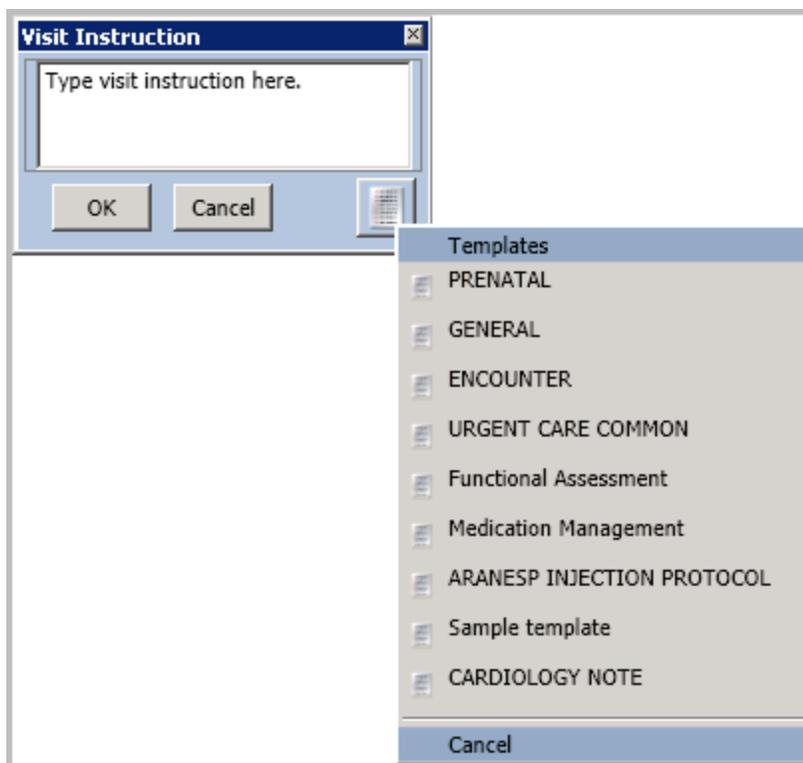
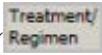


Figure 5-13: Visit Instruction Dialog Box with Templates Menu

- You can also type over an existing Visit Instruction by selecting the text and making any changes.
13. The Pt Ed (Patient Education) column contains the following Subtopic check boxes. Select one or more, as applicable:
- **DP (Disease Process)**
 - **EX (Exercise)**
 - **MED (Medication)**
 - **N (Nutrition)**
 - **LA (Lifestyle Adaptation)**
 - **P (Prevention)**
14. When a Pt Ed check box is selected, the following fields appear below the column. Select the applicable item from the drop-down list or type in the field, as applicable:
- Comprehension Level:
 - **Poor**
 - **Fair**

- **Good**
 - **Group-No Assessment**
 - **Refused**
 - Length (minutes): Type the length of the education in minutes.
 - Readiness to Learn:
 - **Distraction**
 - **Eager to Learn**
 - **Intoxication**
 - **Not Ready**
 - **Pain**
 - **Receptive**
 - **Severity of Illness**
 - **Unreceptive**
15. The Tx/Regimen/FU column contains the Treatment/Regimen button. Click the **Treatment/Regimen** button () to open the **Treatment/Regimen** dialog box:
- a. Click the Expand (⊕) button next to the applicable list heading to view the options. Other is shown in the example below.

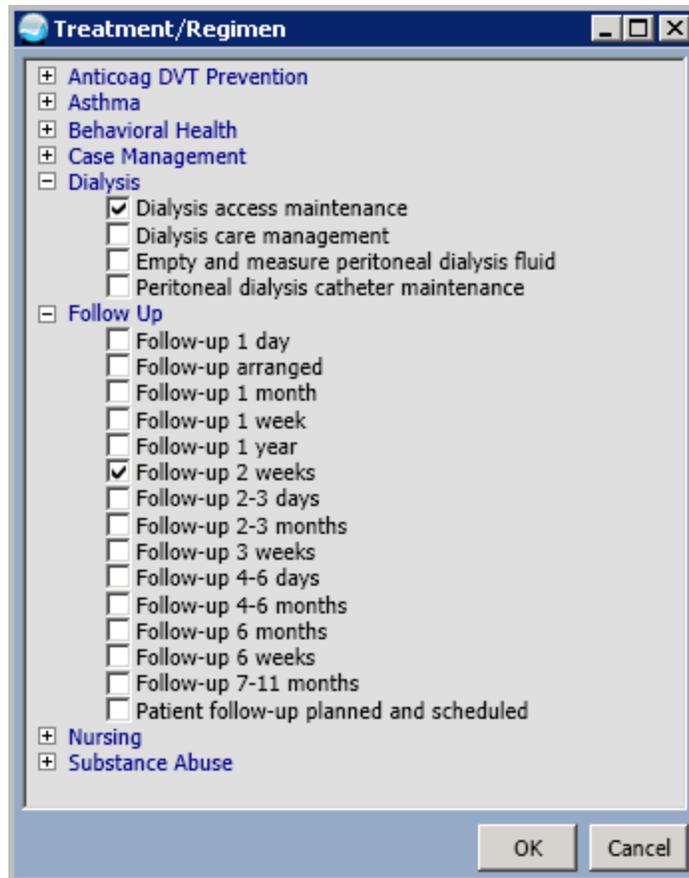


Figure 5-14: Treatment/Regimen Dialog with Alcohol Abuse Expanded

- b. Select one or more check boxes to indicate the Treatment or Regimen for the patient.
 - c. Click **OK**. The Tx/Regimen/FU Display Only column updates with your selection.
16. The Tx/Regimen.FU display-only column shows the Visit Instructions, Patient Education, and Tx/Regimen/FU information.
 17. For example, Given a Visit Instruction: exercise three times per week, Had Disease Process education, Follow-up: arranged. If data is added to any of these items, for example, an additional Patient Education is selected, the Tx/Regimen/FU display only column updates with the new data.
 18. The Primary POV drop-down menu contains a list of the patient's POVs. Select the POV that you want to make the Primary from the drop-down menu.

Note: If a POV was previously set for the visit as primary, it displays in the drop-down menu, but can be changed by the user.

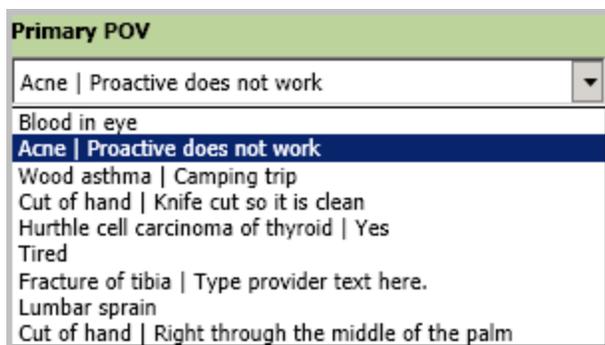


Figure 5-15: Primary POV Drop-Down Menu

19. The E&M (Evaluation and Management) table contains all CPT codes defined to office visit per visit type defined by the E&M component. The user is able to select the Evaluation and Management code for the visit within the Select PVs/Update Problems dialog box. The list changes the CPT code displayed depending which option button is selected, New or Established.

E&M				
<input type="radio"/> New <input checked="" type="radio"/> Established				
Selected	History & Exam	Complexity	Approx Time	CPT Code
<input type="checkbox"/>	Brief	Nurse Visit	5 min	99211
<input type="checkbox"/>	Problem Focused	Straightforward	10 min	99212
<input checked="" type="checkbox"/>	Expanded	Low	15 min	99213
<input type="checkbox"/>	Detailed	Moderate	25 min	99214
<input type="checkbox"/>	Comprehensive	High	40 min	99215

Figure 5-16: E&M Table

20. Click **Save**. A red check mark appears in the POV column of the IPL main window and the eSig tool button may be clicked to sign.

The Problem List window updates with your changes. If an outpatient, the POV shows in the Visit Diagnosis component.

If you click Cancel, the Rollback Operations Already Executed dialog box opens. If needed, select the Rollback check box to indicate that a care planning instruction was created. Then click **OK**.

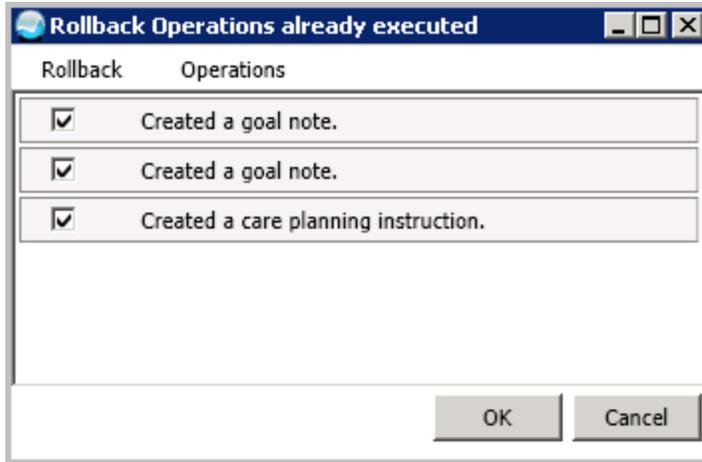


Figure 5-17: Rollback Operation Already Executed Dialog Box

6.0 Using the PickList Button

The PickList button opens the PickList dialog box where the user can choose SNOMED CT descriptions by defined picklists. PickList entries may include associated qualifiers.

Note: If the PickList button is clicked from the main IPL screen, more than one item from a picklist can be selected. If the PickList button is clicked from the Add an Integrated Problem List or the Edit an Integrated Problem List window, only one item from the PickList can be selected.

The PickList button is enabled and picklists can be managed if no visit is selected.

6.1 Selecting Problems from a PickList

To select problems from a defined PickList, follow the steps below:

1. Click the **PickList** button from the IPL main screen or from the **Add Problem** or **Edit Problem** dialog box. The **PickList Selection** dialog box opens.

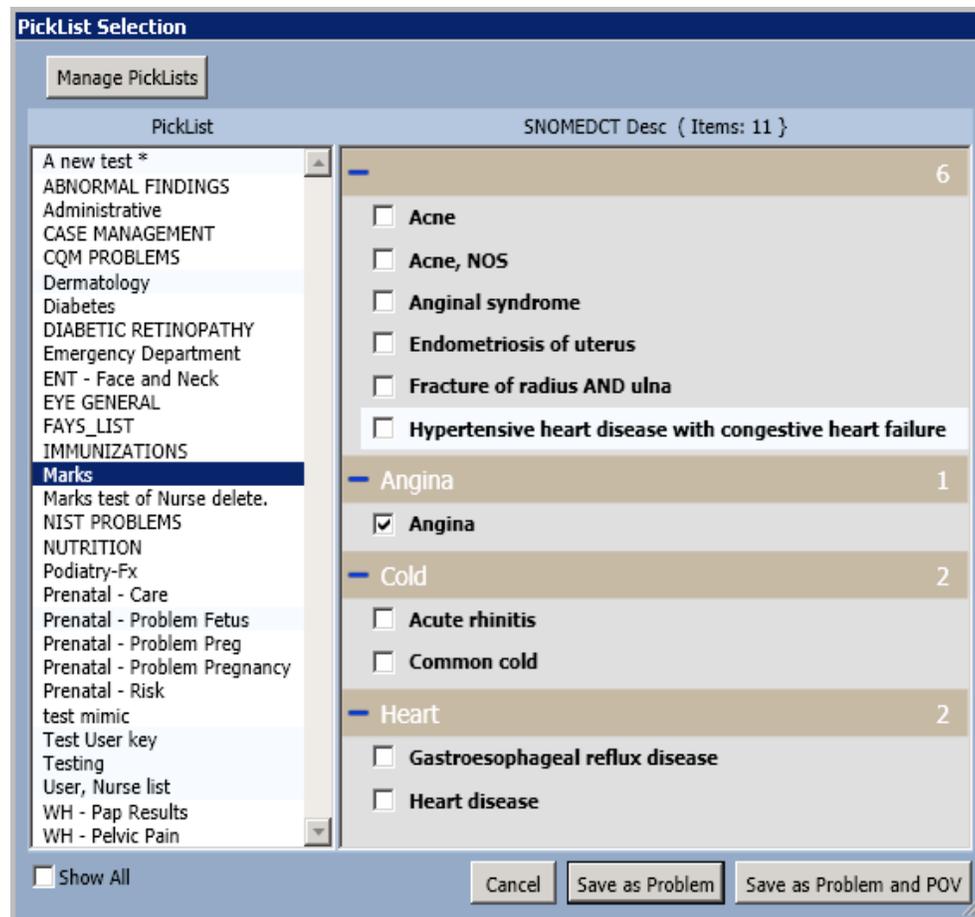


Figure 6-1: PickList Dialog Box

Problems requiring laterality display a drop-down list to the left of the problems. The user must select a laterality, for example Left, Right, Bi-lateral, or unspecified.

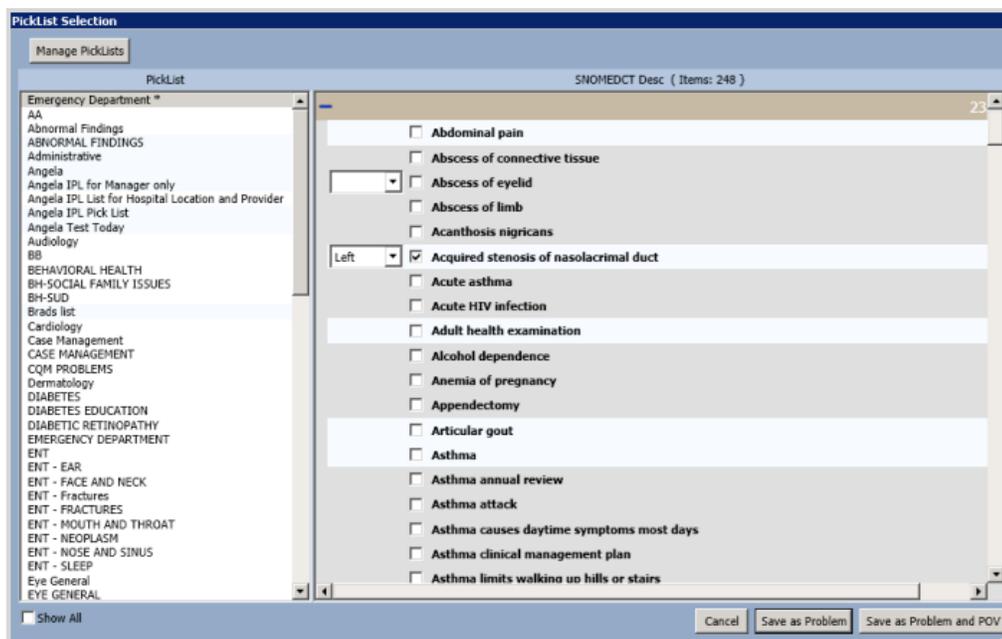


Figure 6-2: Laterality Dialog

The laterality is retained on the **POV** dialog and the **Add/Edit** dialog.

2. In the **PickList** column:

- One or more picklists can be selected if the PickList button from main IPL screen is used.
- Only one picklist can be selected if the PickList button from the Add or Edit an Integrated Problem List screen is used.
- Scroll up or down to view the entire list, if needed.
- Select the **Show All** check box to view any picklists for which the logged-in user is not manager or owner. Users who hold the BGOZ CAC key can view and edit all picklists.
- Picklists with light blue shading indicate an existing problem for the patient. Only new data related to the problem will be saved.
- Both the Save as Problem and the Save as Problem and POV buttons are active for these picklists if the picklist was stored with the May Store as POVs during configuration in managing the picklist. Refer to the Edit PickList Button section for details.
- An Enabled to set problem to POV message appears when the cursor is rested on picklists with light blue shading.

- Picklists with white shading indicate new problems for the patient and are saved as such.
1. In the **SNOMED CT Desc** column:
 - The SNOMED CT Description column refreshes with the items related to the picklists you selected in the PickList column.
 - Problems with light blue shading in the SNOMED CT Desc column indicate existing problems for the patient. If selected, only new data related to the problem will be saved.
 - Both the Save as Problem and the Save as Problem and POV buttons are active for these picklists if the picklist was stored with the May Store as POVs during configuration in managing the picklist. Refer to the Edit PickList Button section for details.
 - An Item already in Problem List (Save will Edit problem) message appears when the cursor is rested on picklists with light blue shading.
 - Problems with white shading indicate new problems for the patient and are saved as such.

Note: Both the picklists and their items are in alphabetical order. The top-right corner of the dialog box indicates the number of SNOMED CT descriptions associated with the selected picklist.

3. Click the **Save as Problem** or **Save as Problem and POV** button, as applicable.
 - If the Save as Problem button is clicked, new picklist items display as newly added problems and Chart Review is triggered. The picklist does not add the problem again for a problem that is a duplicate and already on the patient's problem list; only edits to the problem are retained.
 - If the Save as Problem and POV button is clicked, the POV dialog box opens.

6.2 Managing PickLists

You can manage picklists by performing the following steps for the associated problems.

To manage picklists, users must hold the BGOZ CAC key.

1. Click the **Manage PickLists** button from the **PickList Selection** dialog box. The **Manage Quick Picks** dialog box opens.
2. From the **PickList** drop-down menu, select a picklist to manage. The PickList Items list refreshes with the problems associated with that picklist.
3. Select a problem or select multiple problems by clicking the problem while holding down the Ctrl key. The problem displays highlighted in orange.

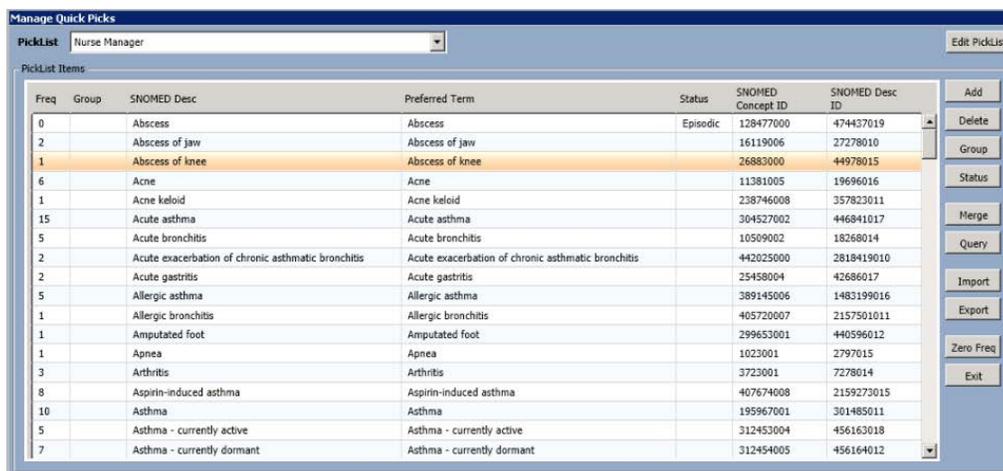


Figure 6-3: Manage Quick Picks Dialog Box

4. Click any of the following buttons to perform the necessary actions:

Adding

- a. Click the **Add** button from the **Manage Quick Picks** dialog box. The **SNOMED CT Lookup** dialog box opens.

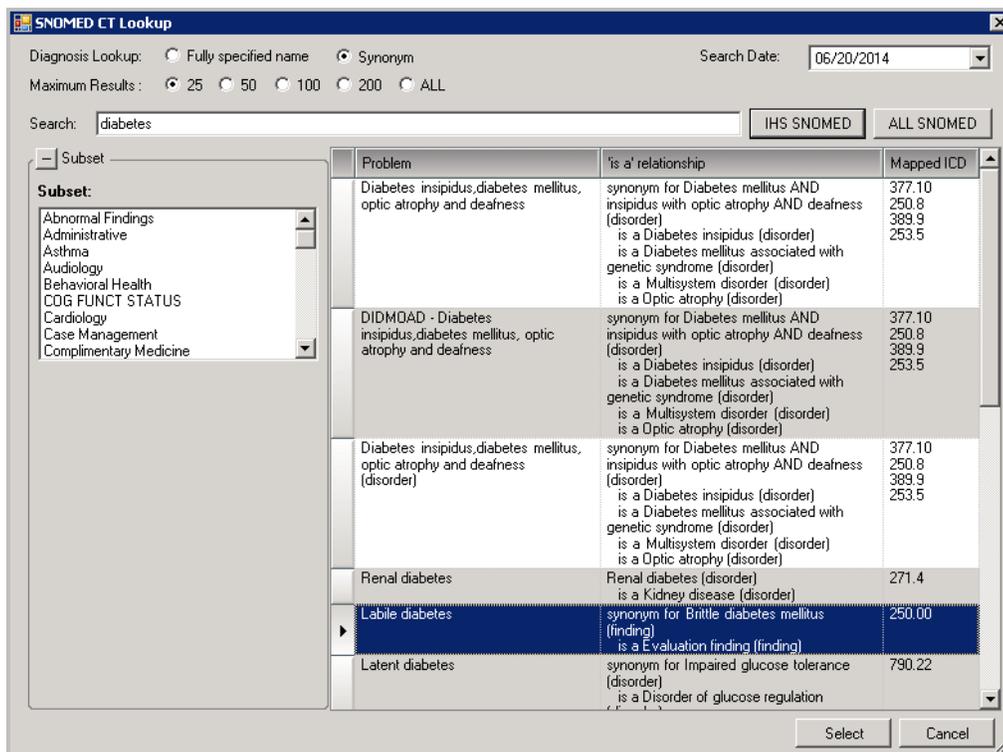


Figure 6-4: SNOMED CT Lookup Dialog Box

- b. In the **Diagnosis Lookup** section, select either the **Fully Specified Name** or **Synonym** option button.

- Fully specified name returns a collapsed list of SNOMED CT terms. Click the Expand button (⊕) next to the term to expand and view the child entries.
 - Synonym returns the full list of SNOMED CT terms.
- c. In **Maximum Results**, click one of the following option buttons to limit the number of results (or click ALL):
- **25**
 - **50**
 - **100**
 - **200**
 - **ALL**
- d. In **Search**, type the term by which you want to search.
- e. In **Subset**, you can select a subset in which to search, if needed.
- f. In **Search Date**, the field defaults to the current date. Click the drop-down arrow to open the calendar and select a different date to search, if needed.
- g. Click either the **IHS SNOMED** or **ALL SNOMED** button. The list of SNOMED CT terms is populated.
- h. Select a problem from the list and then click **Select**. Your selection appears in the **PickList Items** of the **Manage Quick Picks** dialog box.
- The SNOMED Term column displays the description of the selected SNOMED (for example, the Fully-specified name or the Synonym).
 - When an item is added to the PickList, the values stored are SNOMED Concept ID and Description ID of the Fully-specified name, if the Preferred Term is selected. If a Synonym is selected, the SNOMED Concept ID of the Fully-specified name, and the Description ID of the synonym are stored.
 - The Descriptor field stores the SNOMED term preferred or synonym, depending on what was selected from the Apelon tool.

Deleting

- a. Click the **Delete** button from the **Manage Quick Picks** dialog box. The Delete 1 (or number selected) Items confirmation message appears.

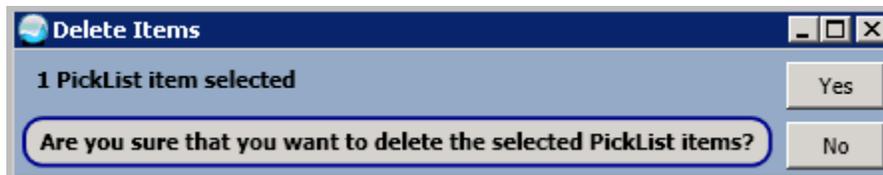


Figure 6-5: Delete PickList Item Confirmation Message

- b. Click **Yes** to Delete, **No** to cancel. If Yes is clicked, the item is removed from the picklist.

Changing Group

- a. Click the **Group** button from the **Manage Quick Picks** dialog box. The **Change the Group values for 1 (or number selected) PickList Items** dialog box opens.

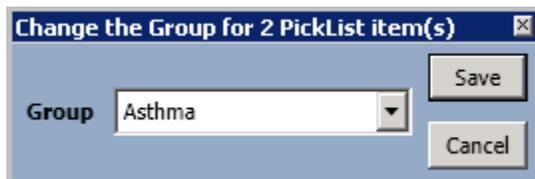


Figure 6-6: Change the Group Dialog Box

- b. In **Group**, select the group to which you want to move the item from the drop-down menu.
- c. Click **Save** to save the new Group.

Changing Status

- d. Click the **Status** button from the **Manage Quick Picks** dialog box. The **Change the Status values for 1 (or number selected) PickList Items** dialog box opens.



Figure 6-7: Change the Status Dialog Box

- e. In the Status drop-down, select a status to assign:
 - **Chronic**
 - **Sub-acute**
 - **Episodic**
 - **Social/Environmental**
 - **Inactive**
 - **Personal Hx**
- f. Click **Save**.

Merging

- a. Click the **Merge** button from the **Manage Quick Picks** dialog box. The **Merge PickList** dialog box opens.

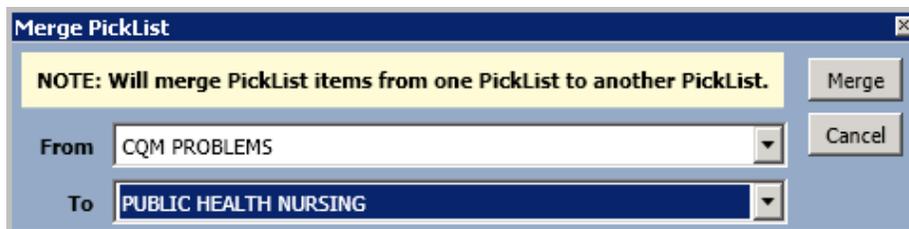


Figure 6-8: Merge PickList

- b. In **From**, select the picklist to merge the item or items from.
- c. In **To**, select the picklist to merge the item or items to.
- d. Click **Merge**.

Querying

- a. Click the **Query** button from the **Manage Quick Picks** dialog box. The **Query for PickList Items** dialog box opens.

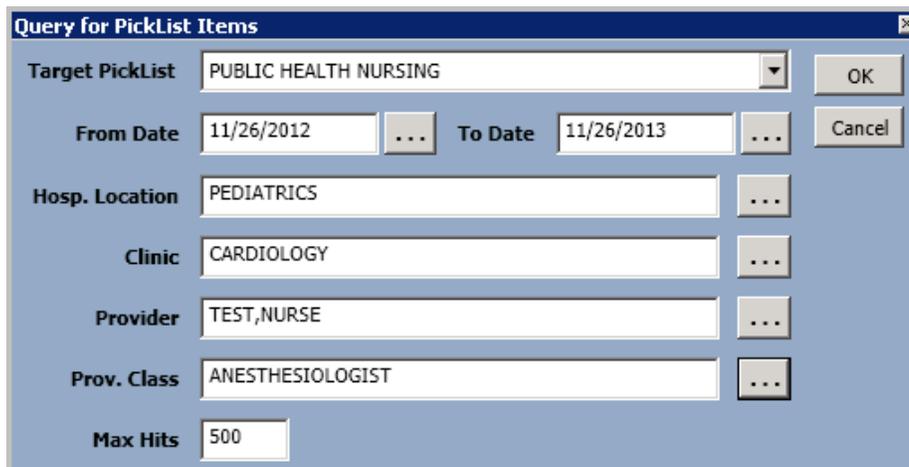


Figure 6-9: Query for PickList Items Dialog Box

- b. In **Target PickList**, select a picklist to query from the drop-down menu.
- c. In **From Date**, click the Ellipsis button to select a date from the calendar.
- d. In **To Date**, click the Ellipsis button to select a date from the calendar.

Note: The From and To date defaults to the current date.

- e. In **Hosp. Location**, click the Ellipsis button to select a location. The **Select a Location** dialog box opens.

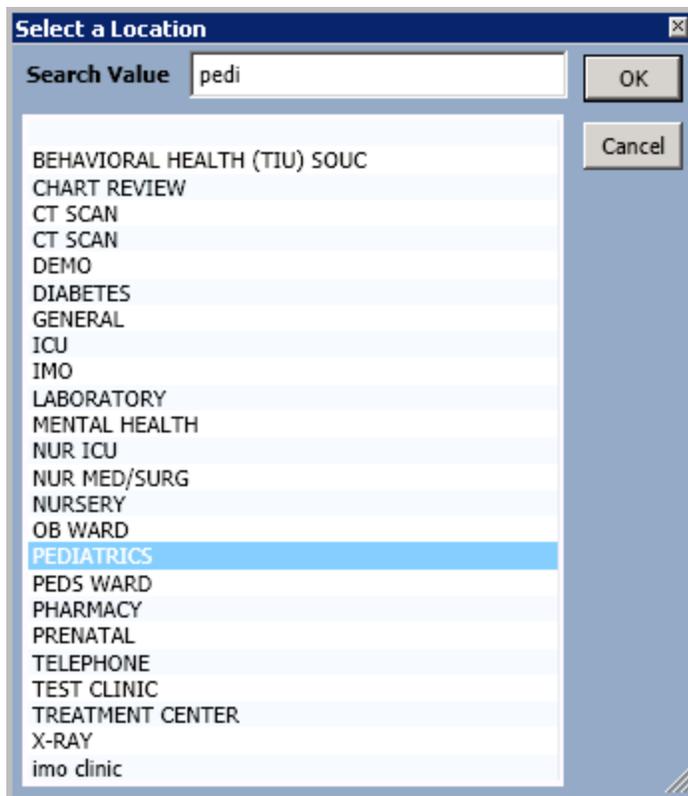


Figure 6-10: Select a Location Dialog Box

- i. In **Search Value** begin typing the first few letters of the location name. The list refreshes with your location.
 - ii. Click to select the location, and then click **OK**. Your selection is populated in the **Hosp. Location** field.
- f. In **Clinic**, click the Ellipsis button to select a clinic. The **Select a Clinic** dialog box opens.

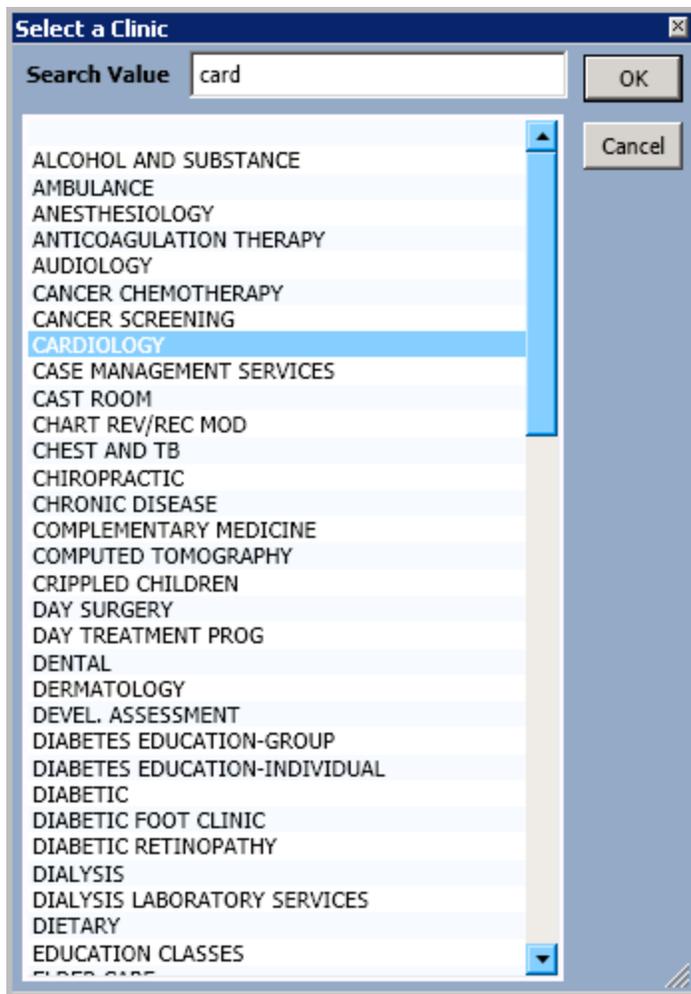


Figure 6-11: Select a Clinic Dialog Box

- i. In **Search Value** begin typing the first few letters of the clinic name. The list refreshes with your clinic.
 - ii. Click to select the clinic, and then click **OK**. Your selection is populated in the **Clinic** field.
- g. In **Provider**, click the Ellipsis button to select a provider. The **Select a Provider** dialog box opens.

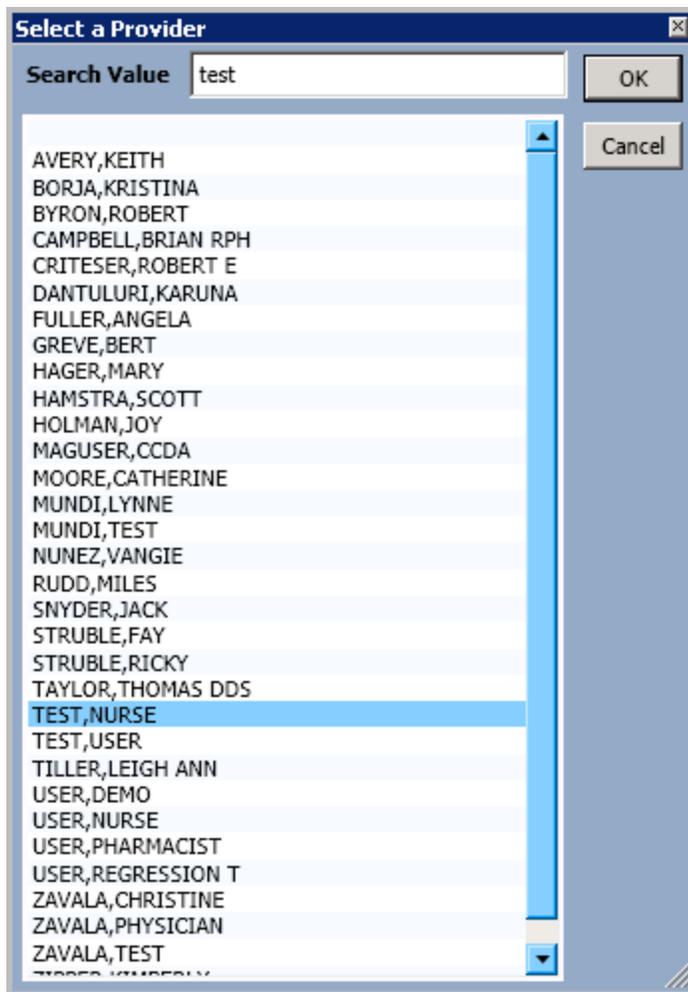


Figure 6-12: Select a Provider Dialog Box

- i. In **Search Value** begin typing the first few letters of the provider name. The list refreshes with providers.
- ii. Click to select the provider, and then click **OK**. Your selection is populated in the **Provider** field.
- h. In **Prov. Class**, click the Ellipsis button to select a provider class. The select a **Provider Class** dialog box opens.

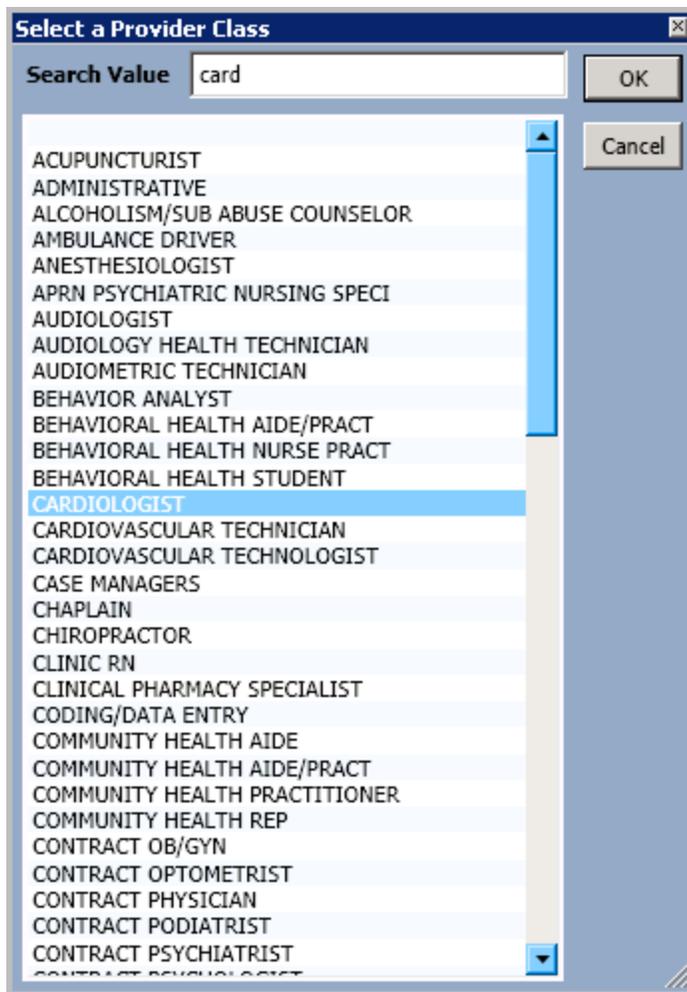


Figure 6-13: Select a Provider Class Dialog Box

- i. In **Search Value** begin typing the first few letters of the provider's class. The list refreshes with provider classes.
 - ii. Click to select the provider class, and then click **OK**. Your selection is populated in the **Prov. Class** field.
- i. In Max hits, 500 is the default. Type a number of hits to return if you want to change the number of hits returned.
 - j. Click **OK** on the **Query for PickList Items** dialog box. An information message appears, showing the number of returned records.

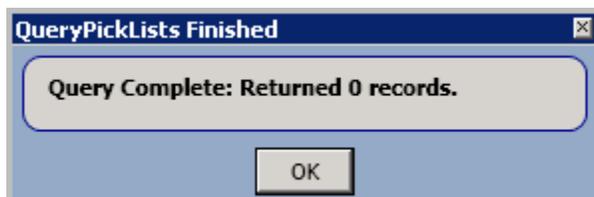


Figure 6-14: Query PickLists Finished Information Message

Importing

- a. Click the **Import** button from the **Manage Quick Picks** dialog box. The **Import SNOMED PickLists** dialog box opens.

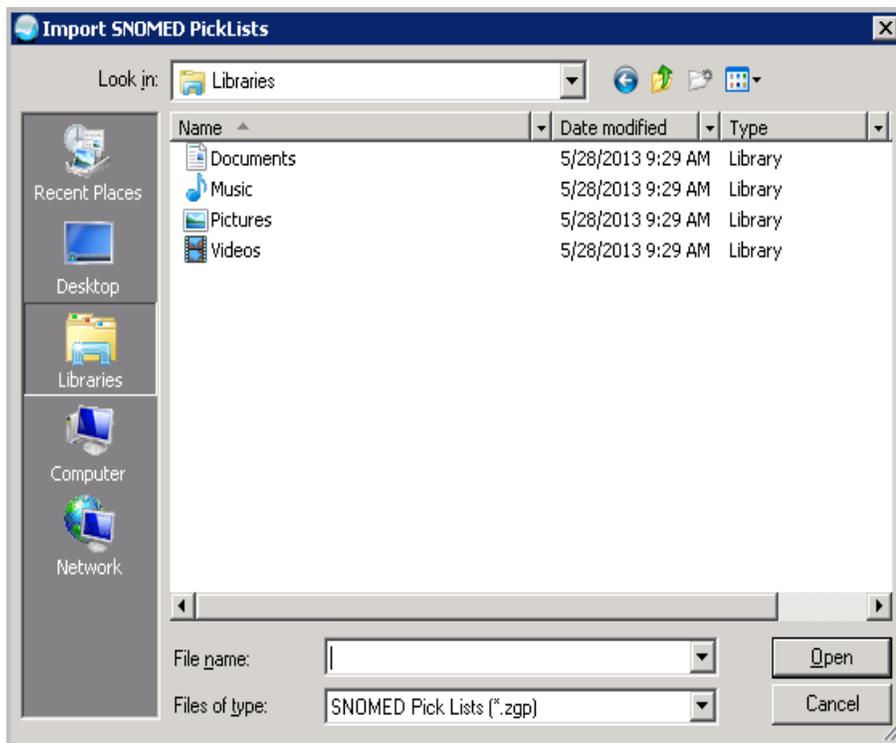


Figure 6-15: Import SNOMED PickLists Dialog Box

- b. In **Look in**, select a location from which to import.
- c. Locate the file you want to import. The Files of Type defaults to SNOMED PickLists (*.zgp).
- d. Click **Open**. Your file is imported.

Exporting

- a. Click the **Export** button from the **Manage Quick Picks** dialog box. The **Save As** dialog box opens.

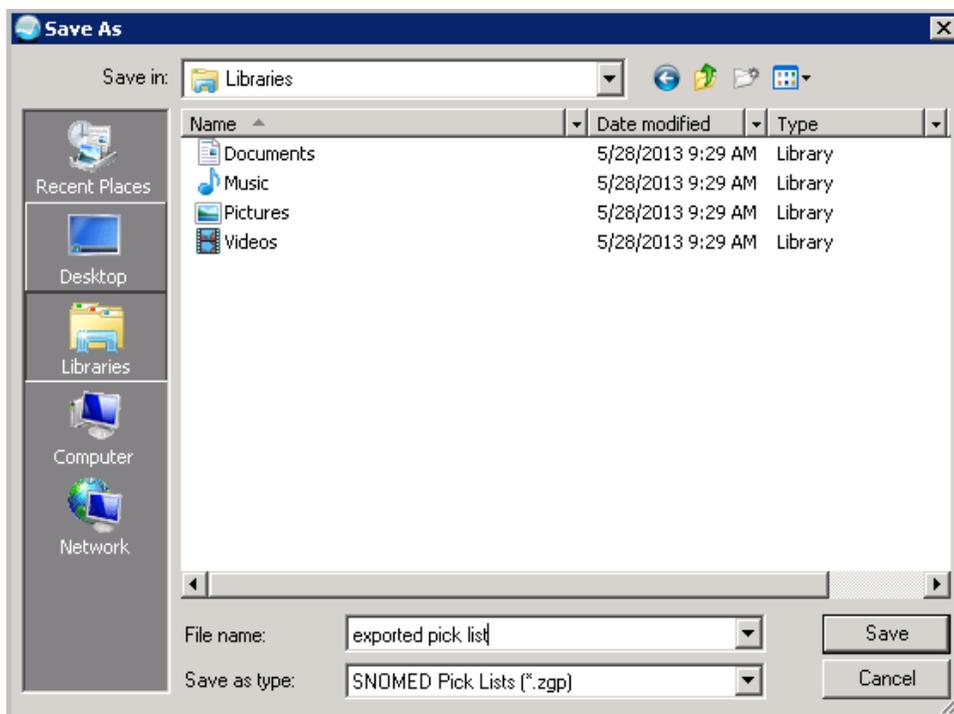


Figure 6-16: Save As (Export PickList) Dialog Box

- b. Select a location to save and type a file name and then click Save. Your SNOMED picklist is saved as .zgp file type, ready for exporting.

Marking Zero Freq(ueency)

- Click the **Zero Freq** button from the **Manage Quick Picks** dialog box. A frequency of zero (0) is assigned to the picklist item.
5. Click **Exit** to close the **Manage Quick Picks** dialog box.

6.2.1 Edit PickList Button

From the **Manage Quick Picks** dialog box, click the **Edit PickList** button to add, edit, delete, or import a subset to an existing picklist.

1. Click the **Edit PickList** button. The **Edit PickList** dialog box opens.

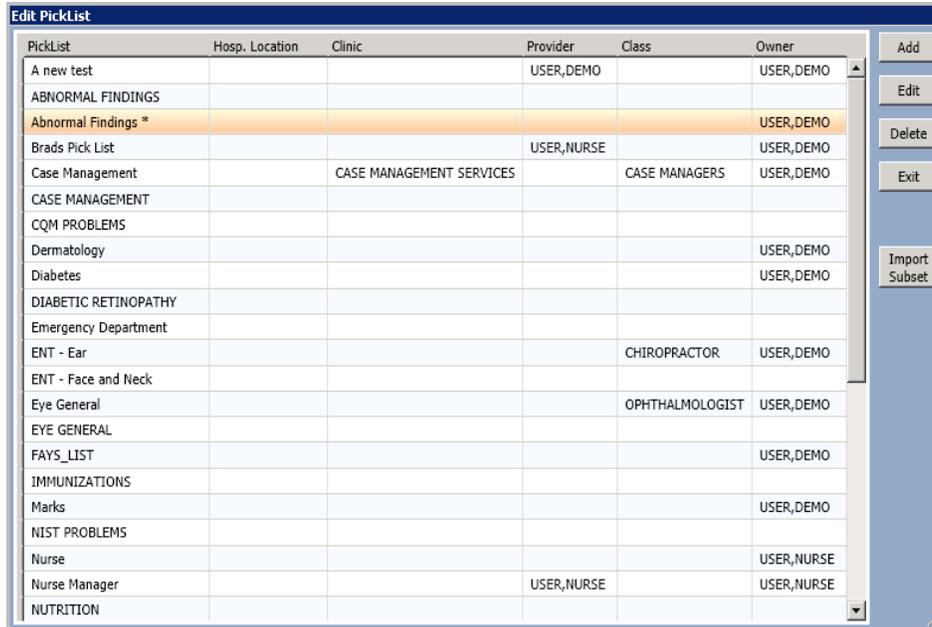


Figure 6-17: Edit PickList Dialog Box

2. Select a **PickList** from the list, and click one of the following buttons:

Add Button

- a. Click **Add** from the **Manage PickLists** dialog box. The **Add PickList** dialog box opens.

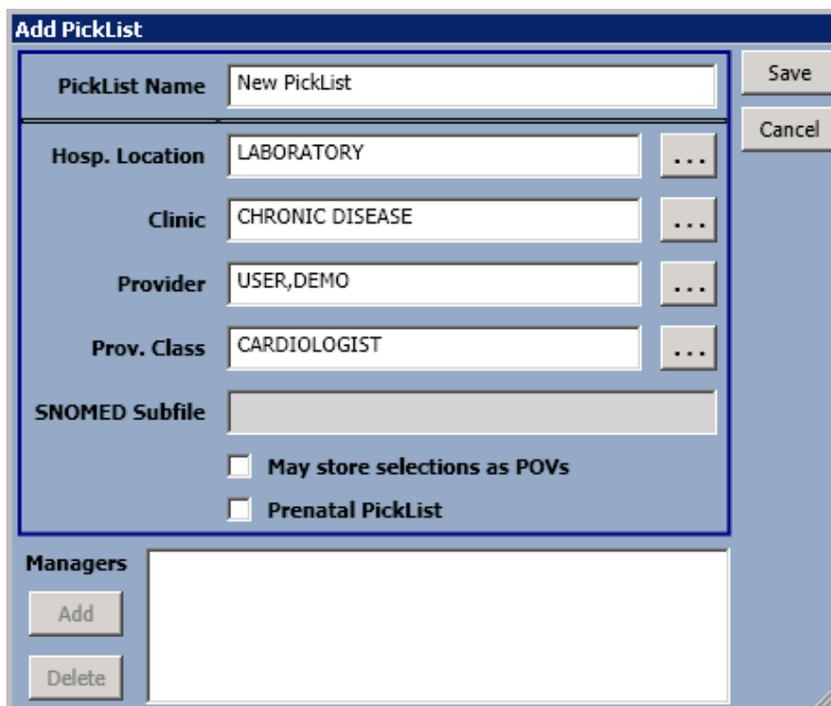


Figure 6-18: Add PickList Dialog Box

- b. In **PickList Name**, type a name for the picklist.
- c. In **Hosp. Location**, click the Ellipsis button to select a location. The **Select a Location** dialog box opens.

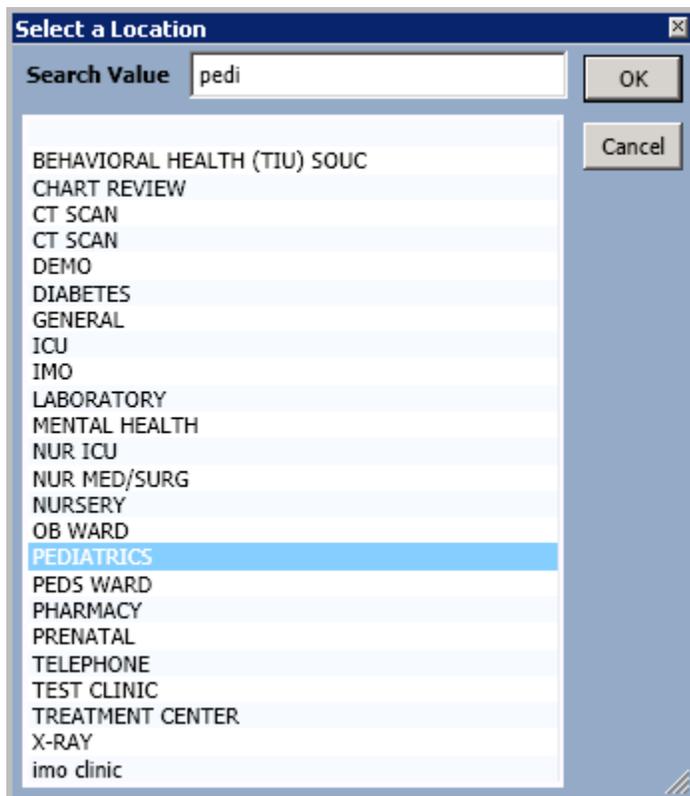


Figure 6-19: Select a Location Dialog Box

- i. In **Search Value**, begin typing the first few letters of the location name. The list refreshes with your location.
 - ii. Click to select the location, then click **OK**. Your selection is populated in the **Hosp. Location** field.
- d. In **Clinic**, click the Ellipsis button to select a clinic. The **Lookup Clinic** dialog box opens.

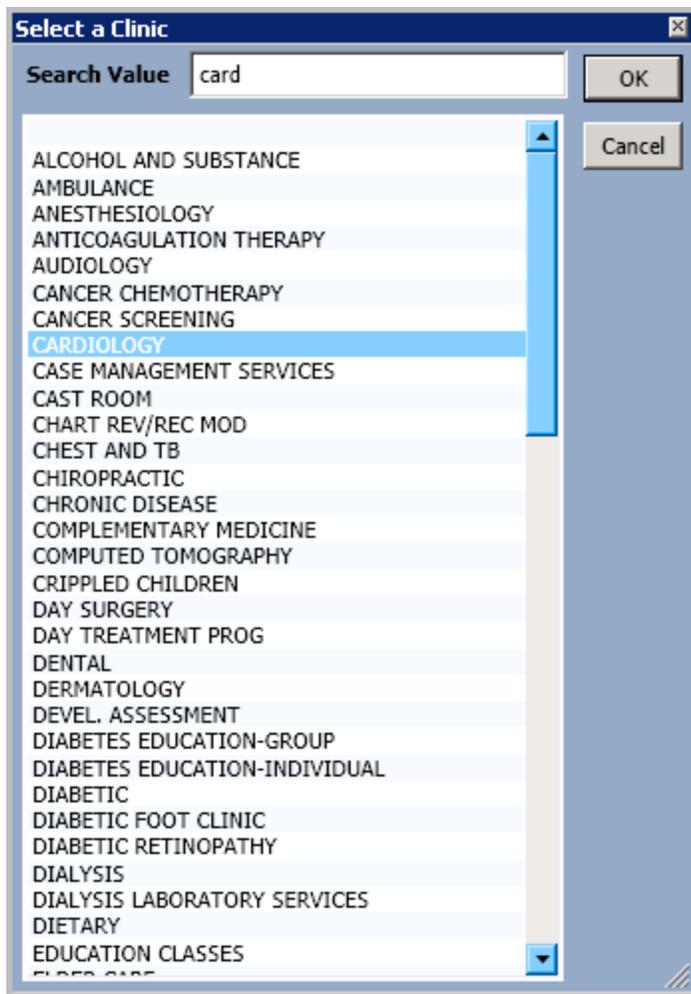


Figure 6-20: Lookup Clinic Dialog Box

- i. In **Search Value** begin typing the first few letters of the clinic name. The list refreshes with your clinic.
 - ii. Click to select the clinic, and then click **OK**. Your selection is populated in the **Clinic** field.
- e. In **Provider**, click the Ellipsis button to select a provider. The **Lookup Provider** dialog box opens.

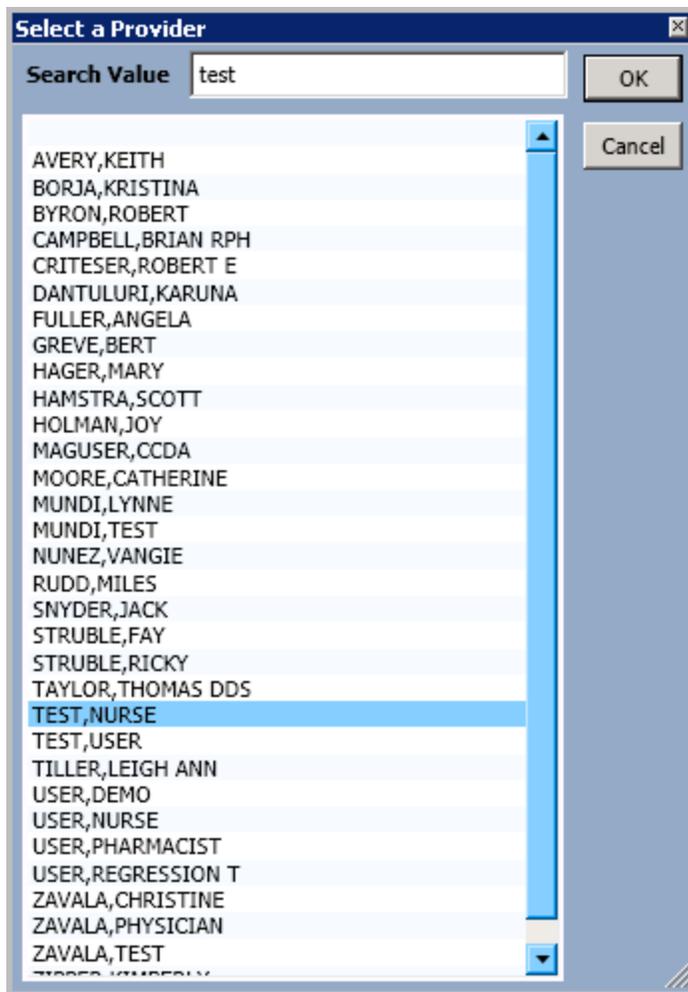


Figure 6-21: Lookup Provider Dialog Box

- i. In **Search Value** begin typing the first few letters of the provider name. The list refreshes with providers.
 - ii. Click to select the provider, and then click **OK**. Your selection is populated in the **Provider** field.
- f. In **Prov. Class**, click the Ellipsis button to select a provider class. The **Lookup Provider Class** dialog box opens.

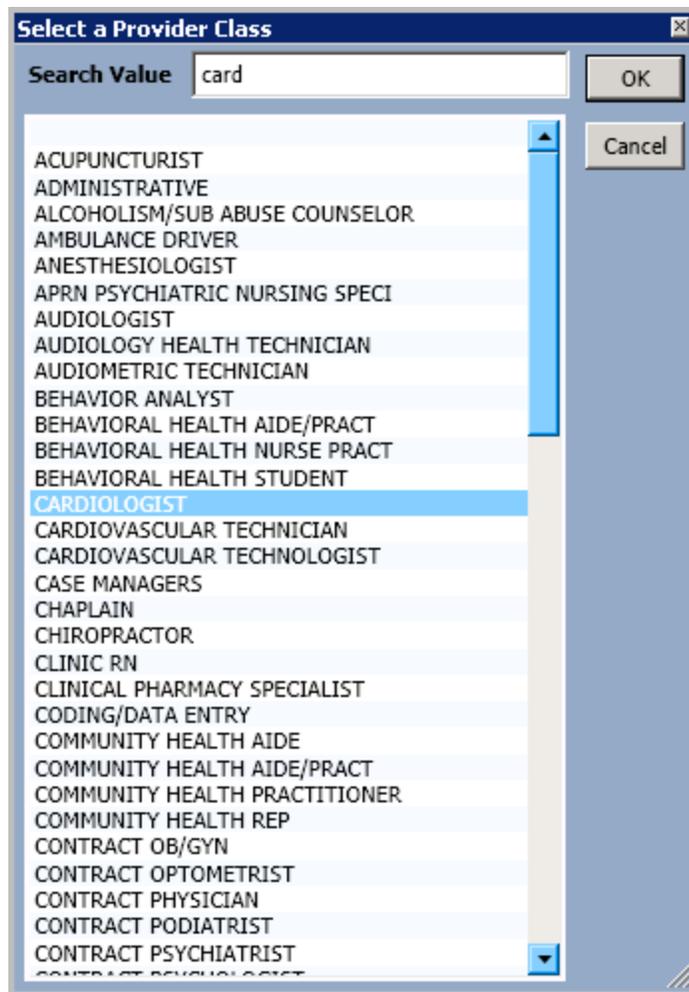


Figure 6-22: Lookup Provider Class Dialog Box

- i. In **Search Value** begin typing the first few letters of the provider's class. The list refreshes with provider classes.
- ii. Click to select the provider class, and then click **OK**. Your selection is populated in the **Prov. Class** field.

The SNOMED Subfile field is not editable, but shows the file the list is based from. For example, if a subset was imported, that subset shows in the SNOMED Subfile field.

The Managers section is inactive until a picklist is created and edited. Refer to the Edit section below.

- g. If applicable, select the May store selections as POV's checkbox. The problems in the picklist can be saved as POV and this enables the **Save as Problem** and **POV** button on the **PickList Selection** dialog box. See the Selecting Problems from a PickList section, above.
- h. If applicable, select the **Prenatal PickList** checkbox.

- i. Click **Save**. Your entries show in the **Manage PickLists** dialog box.

Edit Button

- a. Click to select a picklist to edit from the **Manage PickList Dialog** box. The **Edit PickList** dialog box opens.

The screenshot shows the 'Edit PickList' dialog box. The title bar reads 'Edit PickList'. The main area contains the following fields and controls:

- PickList Name:** Text box containing 'Abnormal Findings *'. To its right is a 'Save' button.
- Hosp. Location:** Text box containing 'TEST CLINIC' with a dropdown arrow button to its right.
- Clinic:** Text box containing 'DIABETIC' with a dropdown arrow button to its right.
- Provider:** Text box containing 'TEST,NURSE' with a dropdown arrow button to its right.
- Prov. Class:** Text box containing 'CLINIC RN' with a dropdown arrow button to its right.
- SNOMED Subfile:** Text box containing 'PICK Abnormal Findings'.
- May store selections as POVs:** A checked checkbox.
- Prenatal PickList:** An unchecked checkbox.
- Managers:** A text box containing 'USER,DEMO' with 'Add' and 'Delete' buttons below it.
- Save/Cancel:** 'Save' and 'Cancel' buttons are located on the right side of the dialog.

Figure 6-23: Edit PickList Dialog Box

- b. Make any necessary changes to the **Edit PickList** dialog entries. Refer to the Add PickList steps above for details on completing the fields.
- c. If applicable, click the **Add** button in the **Managers** section to add a PickList manager. The **Select a Manager** dialog box opens.

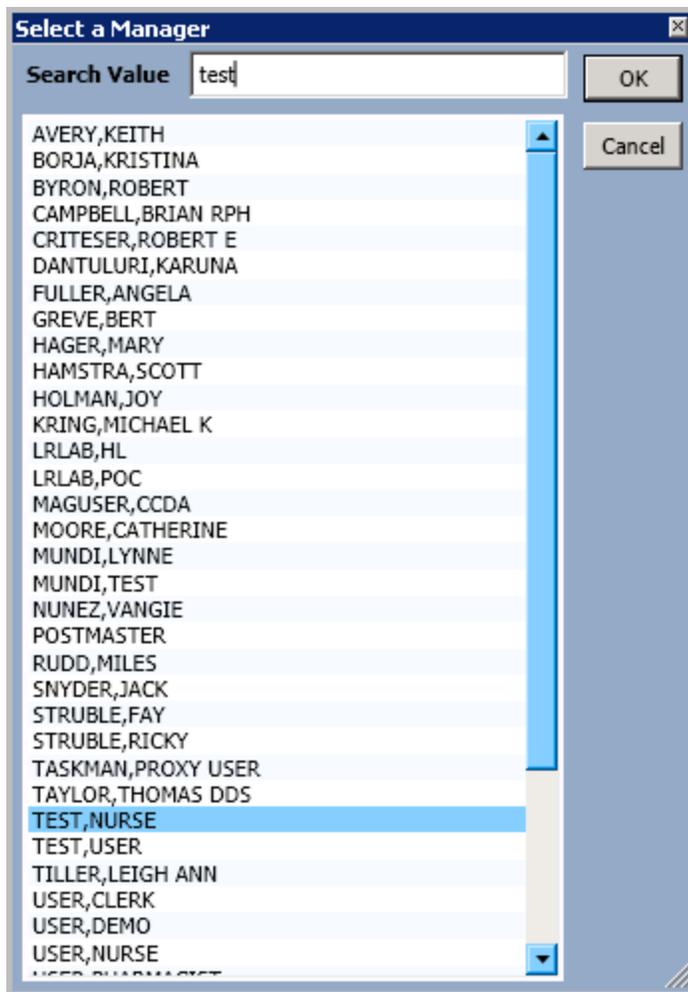


Figure 6-24: Select a Manager Dialog Box

- d. In **Search Value** begin typing the first few letters of the person's name. The list refreshes with your selection.
- e. Click the name, then click **OK**. The **Managers** field populates with your entry.
- f. Click **Save** on the **Edit PickList** dialog box.

Delete Button

- a. Click to select a picklist to delete.
- b. Click the **Delete** button. A **Delete PickList** information message appears.

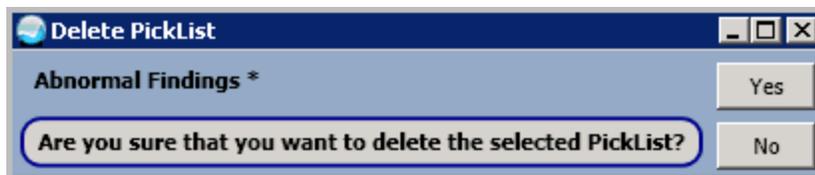


Figure 6-25: Delete PickList Information Message

- c. Click **Yes** to delete the list, or **No** to cancel. If Yes, the picklist is deleted from the list.

Import Subset Button

- a. Click to select a picklist, then click the **Import Subset** button. The **Import Subset** dialog box opens.

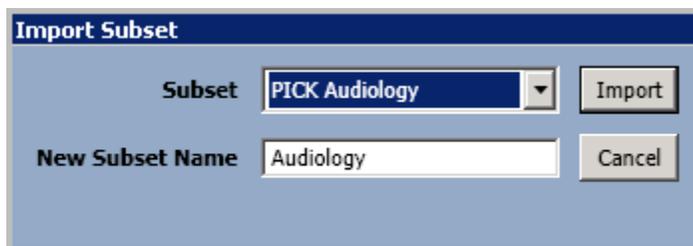


Figure 6-26: Import Subset Dialog Box

- b. In **Subset**, select a subset to import from the drop-down menu. The **New Subset Name** field populates with your selection.
 - c. Click **Import**.
3. Click **Exit** to exit the **Manage PickLists** dialog box.

6.2.2 Updating a PickList

There is an option available to authorized individuals to update all Pick Lists with statuses defaulted for SNOMED terms DTS. A CAC could run an option so all SNOMED terms in pick lists loop through DTS and update each entry with its default status from DTS.

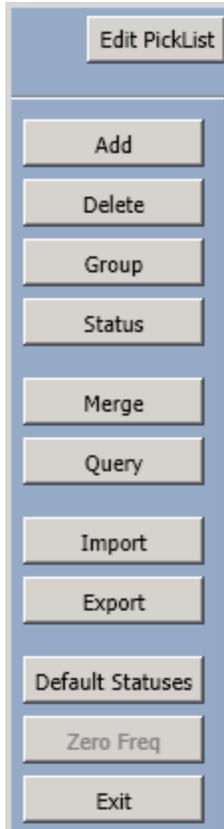


Figure 6-27: Updating a PickList Drop-Down List

When selecting a default status and then clicking **Yes**, all statuses are reset to their default status.

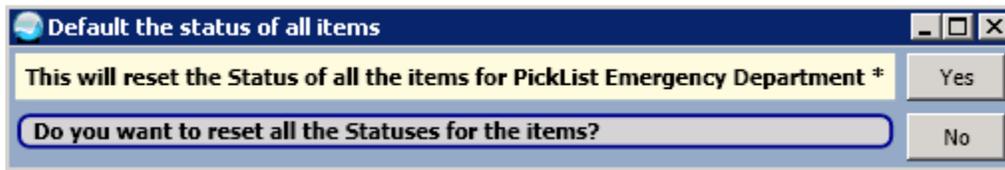


Figure 6-28: Default Status Dialog

7.0 IPL Cleanup

7.1 Updating Problems to Chronic, Routine/Admin, and Social/Environmental Status

The new option PLST Update Problem Status Based on SNOMED Default is used to update the problem list status based on the default status associated with the problem SNOMED term.

7.1.1 Status Update Selection Descriptions

- Update all Chronic: Loops through the problems on the IPL, and for any problem whose Concept ID is defaulted to Chronic in DTS, change to Chronic on IPL. Problems on the IPL with a status of inactive are skipped and the status is not changed.
- Update all Social/Environmental: Loops through the problems on the IPL, and for any problem whose Concept ID is defaulted to Social/Environmental in DTS, change to Social/Environmental on IPL. Problems on the IPL with a status of Inactive or Chronic are skipped and the status is not changed.
- Update all Routine/Admin: Loops through the problems on the IPL, and for any problem whose Concept ID is defaulted to Routine/Admin in DTS, change to Routine/Admin on IPL. Problems on the IPL with a status of Inactive are skipped and the status is not changed.

1. Log in to PCC
2. Go to PCC > DEU > SUP > PLST to update the Problem Status based on the SNOMED Default
3. Select one of the following:
 - C – Chronic Status Concept IDs
 - O – Social/Environmental
 - R – Routine/Admin
 - A – All Types
4. Enter your selection. The status update you chose executes.

7.2 Instructions for Setup of Automated Inactivation of Episodic Status

BJPC p16 includes a new task, executed using TaskMan, APCD EPISODIC CLEANUP. The task looks at the number of days entered in the new EHR parameter,

BGO IPL INACTIVATE TIMEFRAME Look Back for APCD EPISODIC CLEANUP. When the task is executed, episodic problems marked as POVs for visit dates older than the number of days entered in the parameter, are changed to inactive status.

7.2.1 Set EHR Parameter

1. Open PCC.
 - General Parameter Tools – [XPAR MENU TOOLS]
 - EP – Edit Parameter Values
2. Select PARAMETER DEFINITION NAME: BGO IPL INACTIVATE TIMEFRAME Lookback for APCD EPISODIC CLEANUP Value:

Enter number of days to look back for episodic problems used as POV. Look Back is used to determine how long before episodic problems that have not been used as a POV will be changed over to inactive status.

For example, an entry of 30 indicates that any problems with episodic status used as POV before 30 days back from today will be changed to inactive status.

7.2.2 Execute the APCD EPISODIC CLEANUP TASK

1. Execute the task in TaskMan Now.
 - a. Go to **TaskMan Management**.
 - b. Select **One Time Option Queue**.
 - c. Select OPTION NAME, and select APCD EPISODIC CLEANUP Inactivate Episodic Problems not used as POV.
 - d. Select the default at the following prompts below:

```
Does this option need a DEVICE? NO//
Enter Particular Volume set if needed:
Requested Start Time: NOW//
```

The task will execute.

2. Schedule a recurring or one-time task to execute at a later time.
 - In PCC kernel menu
 - TaskMan Managements
 - Schedule/Unschedule Options
3. Select OPTION to schedule or reschedule, and select APCD EPISODIC CLEANUP Inactivate Problems not used as POV.

```
QUEUED TO RUN AT WHAT TIME:   Enter the date/time you want this option
to run
DEVICE FOR QUEUED JOB OUTPUT:  enter
QUEUED TO RUN ON VOLUME SET:  enter
RESCHEDULING FREQUENCY:      enter how often you want the task to run.
Example:  30D
TASK PARAMETERS:  enter
SPECIAL QUEUEING:  enter
```

8.0 Parameters

8.1 BGO IPL INACTIVATE TIMEFRAME

It is **critical** that this is set AFTER the problem lists have been cleaned up using the utility to convert episodic problems to chronic, routine, social (PCC options). Otherwise problems mistakenly set as episodic may get inactivated.

8.2 BGO IPL Eye DX

If the parameter is set to Yes, the Eye Related tab displays if there are eye-related problems. All eye problems appear on that tab unless they are marked as POV. If marked as POV, they display on the Core tab.

Contact Information

If you have any questions or comments regarding this distribution, contact the OIT User Support (IHS) by:

Phone: (888) 830-7280

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

Email: <mailto:support@ihs.gov>