



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **Electronic Health Record**

**(EHR)**

## **Addendum to EHR User Manual**

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## Preface

The following are Indian Health Service (IHS) components in the Resource and Patient Management (RPMS) Electronic Health Record (EHR).

- Activity Time
- Immunizations
- IPL
- Triage Summary

## 1.0 Activity Time

### 1.1 Activity Time Panel

The **Activity Time** panel refers to how much provider time was involved in providing and documenting the service or performing an activity. The activity is always recorded minutes. EHR calculates the total activity time for both the **Encounter Time** and **Travel Time** fields. Refer to the following figures:

- **Figure 1-1:** Activity Time Display in Small Pane–No Visit Selected
- **Figure 1-2:** Activity Time Display in Small Pane–Visit Selected
- **Figure 1-3:** Activity Time Normal View–No Visit Selected
- **Figure 1-4:** Activity Time Normal View–Visit Selected

If the area in EHR for the component’s placement is small, the component will only display manual **Encounter Time** or **Travel Time** data entry fields.

Figure 1-1: Activity Time Display in Small Pane–No Visit Selected

Figure 1-2: Activity Time Display in Small Pane–Visit Selected

Figure 1-3: Activity Time Normal View–No Visit Selected

Figure 1-4: Activity Time Normal View–Visit Selected

## 1.2 Manual Data Entry

To add values to the **Activity Time** panel (Figure 1-5), you can do one of the following:

- Click in the **Encounter Time** or **Travel Time** fields and directly type the time spent.
- Click the **Up** and **Down** arrows to adjust the value up or down in one-minute increments.

Total time sums up entered time values from both **Encounter Time** and **Travel Time**.

Figure 1-5: Manual Data Entry dialog

1. Select a **patient** and a **visit**.
2. Navigate to the **Activity Time** component.
3. Enter the **amount of time** in the **Encounter Time** field. The **Up** and **Down** arrows will change that value by + or - **1**.
4. Enter the **amount of time** in the **Travel Time** field. The **Up** and **Down** arrows will change that value by + or - **1**.
5. Click the **OK** button save the data or click the **Cancel** button to remove entered data.

### 1.3 Clock Data Entry

To add values to the **Activity Time** panel, you can either click in the **Encounter Time Clock** or **Travel Time Clock**.

Refer to the following figures:

- **Figure 1-6:** Single Click 1-Minute Increment
- **Figure 1-7:** Single Click in 1-Minute Increment–Then Double Click
- **Figure 1-8:** Single Click in 5-Minute Increment
- **Figure 1-9:** Single Click in 5-Minute Increment Then Double Click

You can select a specific minute or within a 5-minute increment to enter values. Total time sums up entered time values from both **Encounter Time** and **Travel Time**.

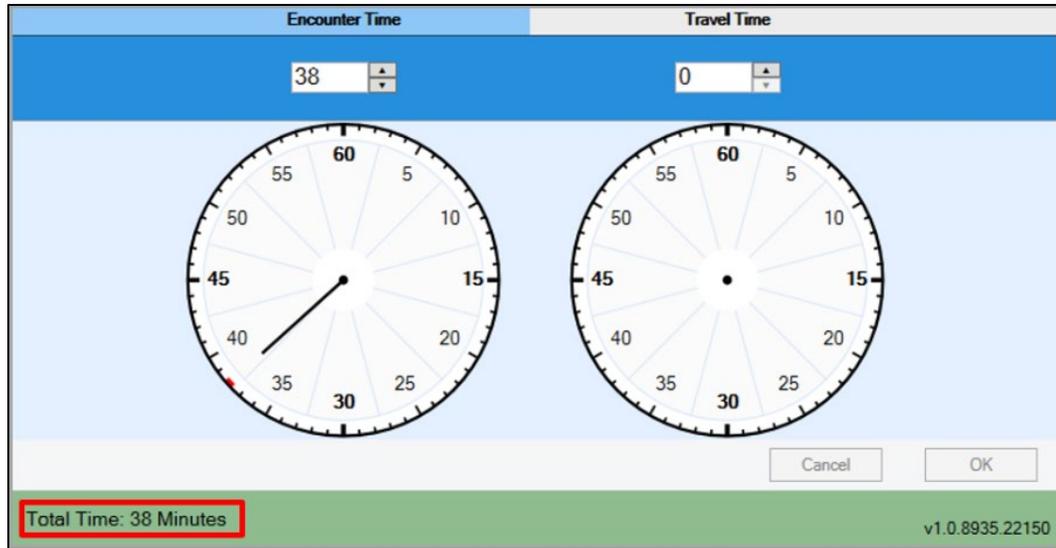


Figure 1-6: Single Click 1-Minute Increment

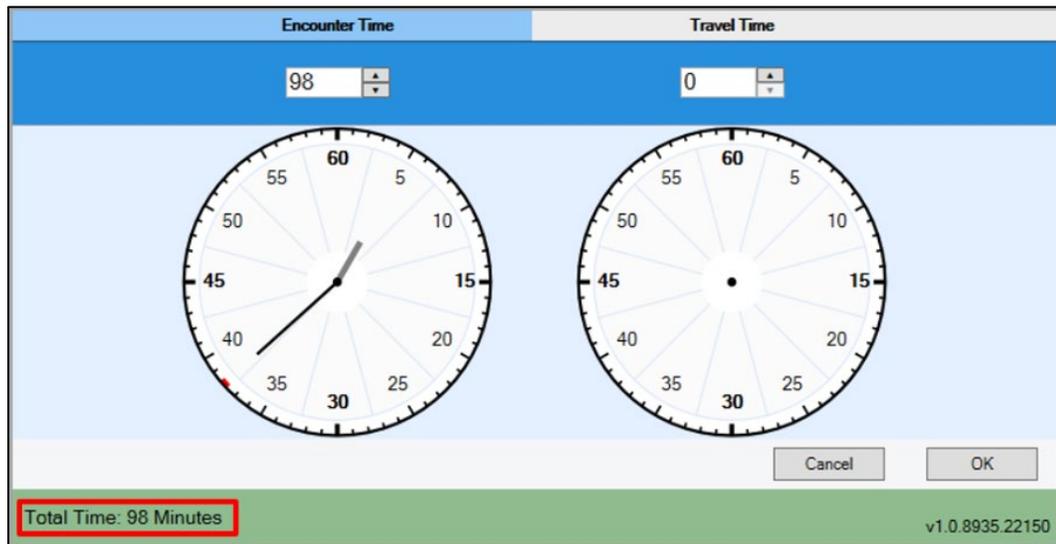


Figure 1-7: Single Click in 1-Minute Increment–Then Double Click

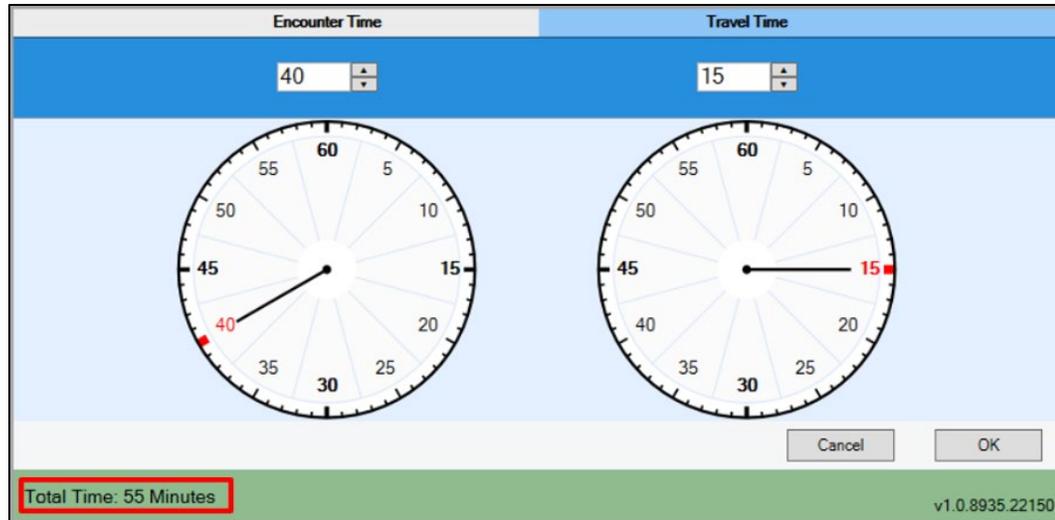


Figure 1-8: Single Click in 5-Minute Increment

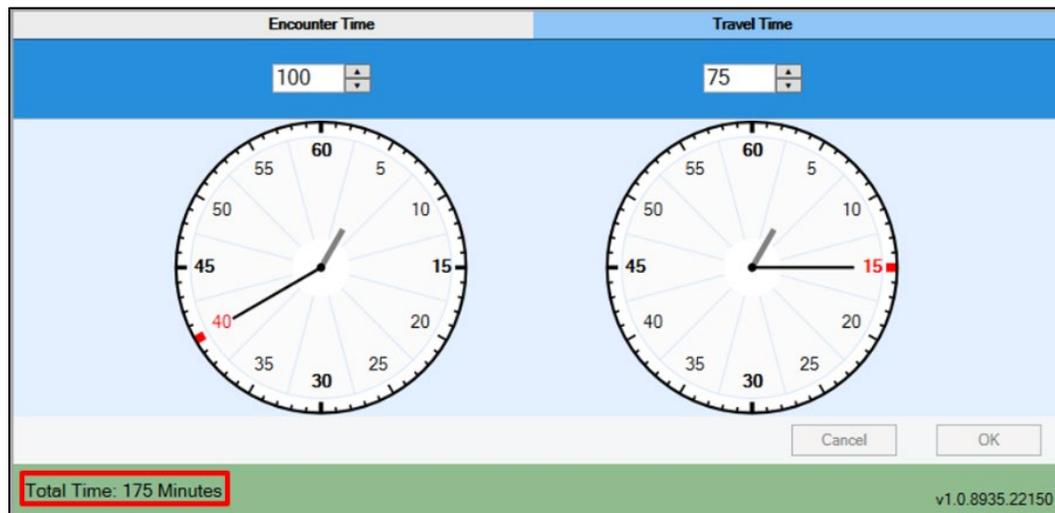


Figure 1-9: Single Click in 5-Minute Increment Then Double Click

1. Select a **patient** and a **visit**.
2. Navigate to the **Activity Time** component.
3. Single-click the **Encounter Time** clock. The clock is partitioned into 5-minute increments and displays 1-minute increments on the outer circle of the clock. Example, 40 (5 min) or 38 (1 min).
4. Double-click in same area of **clock**. Time field is updated with an addition 60 minutes. Each double-click adds an additional 60 minutes.
5. Click the **OK** button to save data or click the **Cancel** button to remove entered data.

## 2.0 Immunizations

### 2.1 Introduction

The **Immunizations module (IMM)** (Figure 2-1 and Figure 2-2) enables the viewing, editing, and adding of immunization information for patients into the Resource and Patient Management System (RPMS). It requires that **Version 8.0** or later of the **RPMS Immunization** package be installed.

This component enables the provider to see immediately which vaccines the patient has received, and which ones are needed. This component has been extensively redesigned to improve user experience.

Registry	CVX	Vaccine	Visit Date	Age@Visit	Location	Reaction	Volume	Inj Site	Lot	Manufacturer	VIS Date	Administered By	Vaccine Eligibility	Ordered By	VIS Presented	Admin Date	Admin Notes
RPMS ONLY	30	HBIG	08/21/2024	23 yrs	2017 DEMO CLINIC TEHR		0.05	Right Arm ID	BB123456	GLAXOSMITHKLINE	07/31/2024	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	08/26/2024	08/26/2024	
RPMS ONLY	114	Menactra	08/21/2024	23 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh IM	US567CA (KIDS)	SANOFI PASTEUR	08/06/2021	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	08/26/2024	08/26/2024	
RPMS ONLY	217	COV.PfAdo	07/29/2024	23 yrs	2017 DEMO CLINIC TEHR		0.3	Right Thigh SQ	PFTRIS217	PRIZER, INC	12/08/2022	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	07/29/2024	07/29/2024	
RPMS ONLY	33	PNEUMO-PS	07/08/2024	23 yrs	Other								Not Eligible			07/08/2024	Received from AZ State Registry
RPMS ONLY	88	FLU.NDS	04/24/2024	23 yrs	Walgreens								Not Eligible			04/24/2024	
RPMS-AZ	186	FLU-H4I	04/24/2024	23 yrs	Walgreens								Not Eligible			04/24/2024	
RPMS-AZ	141	FLU-HIV3	04/17/2024	23 yrs	Test								Not Eligible			04/17/2024	
RPMS-AZ	113	Td-ADULTp	04/24/2020	19 yrs	2017 DEMO CLINIC TEHR		0.5	Left Deltoid IM	XYZ321	SANOFI PASTEUR	04/11/2017	ALLEN,MIKE	Not Eligible			04/24/2020	Can you see this note?
RPMS-AZ	141	FLU-HIV3	12/08/2015	15 yrs	Sioux Falls Sanford								Am Indian/AK Native			12/08/2015	
RPMS-AZ	111	FLU-LAIV3	09/11/2012	12 yrs	St. Joe's		0						Not Eligible			09/11/2012	
RPMS-AZ	62	HPV-4v	04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	1261AA	MERCK & CO	05/03/2011	WHITEMOUSE.DAVID R	Am Indian/AK Native			04/05/2012	
RPMS-AZ	114	Menactra	04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	U4098AB	SANOFI PASTEUR	10/14/2011	WHITEMOUSE.DAVID R	Am Indian/AK Native			04/05/2012	
RPMS-AZ	115	Tdap	04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Left Deltoid IM	AC52B055AA	GLAXOSMITHKLINE	11/18/2008	WHITEMOUSE.DAVID R	Am Indian/AK Native			04/05/2012	
RPMS-AZ	141	FLU-HIV3	10/07/2011	11 yrs	St. Joe's		0						Not Eligible			10/07/2011	
RPMS-AZ	18	RABIES.IM	04/28/2011	10 yrs	2017 DEMO CLINIC TEHR								Not Eligible				
RPMS-AZ	62	HPV-4v	11/30/2010	10 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	0786Z	MERCK & CO	03/30/2010	SWENSON,MATT	Am Indian/AK Native			11/30/2010	

Figure 2-1: Immunizations Record window No Reconciliation Needed

Registry	CVX	Vaccine	Visit Date	Age@Visit	Location	Reaction	Volume	Inj Site	Lot	Manufacturer	VIS Date	Administered By	Vaccine Eligibility	Ordered By	VIS Presented	Admin Date	Admin Notes
RPMS ONLY	130	DTaP (KINRO)	08/22/2024	62 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh IM	43H3 (Kids)	GLAXOSMITHKLINE	07/24/2023	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	08/22/2024	08/22/2024	
RPMS ONLY	20	DTaP	08/01/2024	62 yrs	Vlarm Springs Health Cent		0.5	Left Thigh IM	43H3 (Kids)	GLAXOSMITHKLINE	07/24/2023	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	08/22/2024	08/22/2024	
RPMS-AZ	33	PNEUMO-PS	06/17/2024	62 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh SQ			10/30/2019	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	06/20/2024	06/20/2024	
RPMS-AZ	181	ZOS-Shgrx	04/05/2024	62 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh IM			02/04/2022	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	04/11/2024	04/11/2024	
AZ ONLY	228	COV.Modfct	04/04/2024	62 yrs	OTHER		0.25		MODSP234	SANOFI PASTEUR	08/06/2021	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	04/04/2024	04/04/2024	Moderna US, Inc
RPMS-AZ	115	Tdap	04/04/2024	62 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh SQ	CS12BA (Kids)	SANOFI PASTEUR	08/06/2021	STRUBLE.FAY	Not Eligible	STRUBLE.FAY	04/04/2024	04/04/2024	

Figure 2-2: Immunizations Record window with Reconciliation Needed

The **IMM** component continues with background features enabling RPMS to query the **State IIS** to retrieve and store IIS history and forecast data, making it available for any RPMS application. Potential settings for this capability may include:

- 2015 Certification requires that additional information received from a state registry be included and visible. This displays when the user clicks the **State Profile** button, and a site has established a state IIS connection.

- Querying the **State IIS** for all patients with an upcoming (e.g., next day) appointment.
- Querying the **State IIS** for a single patient upon check-in to a clinic.
- Querying the **State IIS** for a single patient on demand by the nurse or provider.

By comparing the local facility's immunization record and forecast with that from the state, users will have a more complete picture of the patient's immunization history, discover immunizations done elsewhere that should be added to the local record, and minimize the risk of over-immunization.

If the patient may have received immunizations at locations other than the local one, and the other location's system is set up for immunization exchange with one or more states, there may be information available in the State IIS that can be incorporated into the local RPMS system. This information can be viewed by accessing the **State Immunization Profile** drop-down menu. It displays the **State Immunization Exchanges** that are configured for the site and allows for additional information to be displayed and printed for the patient.

The **Immunization** component may be placed anywhere in the EHR. With the expanded functionality, it may need to be moved to a larger space in order to efficiently view and utilize all the functionality.

- **Forecast pane (upper left)**—Contains a list of immunizations that are **Due** or **Past Due**, as derived from the **ICE Forecasting System**. A user can enter a vaccine directly from this pane by double-clicking the row containing the vaccine name (refer to Section 2.4.1 for more information).
- **Immunizations From Outside Sources pane (upper right)**—Contains the **Refresh States** button that enables the user to display the latest information regarding outside vaccine sources (currently configured **State Registries** in RPMS), along with the date/time of the most recent query response from the state (refer to Section 2.2 for more information).
- **Contraindications pane**—Displays the patient's contraindications, such as a history of chicken pox or reactions to specific vaccines.
- **Immunization History pane**—Displays all immunizations that have been received from the state or entered into the RPMS. All columns can be sorted by left-clicking a column heading. If no vaccination information for a patient is present in RPMS, the grid is empty.

The **Immunization History** pane also allows the user to display a visit detail by right-clicking any item in the grid. Use this to display the **visit detail** for a selected record (refer to Section 2.9 for more information).

**Note:** This component can be configured so that a particular user or class, for example users assigned the **BGOZ VIEW ONLY** key, cannot add/edit the immunization record.

## 2.2 Immunizations From Outside Sources

The **Immunizations** module allows users to reconcile incoming vaccine state registry information that displays as **<State Only>**. These entries do not match up to any patient immunization record contained in EHR/RPMS.

The **Immunizations From Outside Sources** banner color (Figure 2-3) is orange and a message is presented in the text box, Immunizations need attention. The **Go to Reconciliation** button () is enabled.



Figure 2-3: Immunizations From Outside Sources banner

1. User clicks the **Go to Reconciliation** button.

A new dialog opens called **Immunization Reconciliation**.

- The system displays a drop-down list that allows the user to manage all states at one time or manage them individually by selecting a state. This is only applicable if the site is configured with a connection to more than one IIS registry.
- The system displays the **Add** button disabled and the **Edit** button disabled.
- The **Immunizations Reconciliation** dialog (Figure 2-4) displays two tables.
  - The top table is all the **State-Only** vaccines that need to be reconciled.
  - The bottom table is all the **RPMS only** and **RPMS + <State>** entries in the **V Immunization** file, excluding entries where the visit is locked.

**Immunization Reconciliation**

State Registries:

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
FLU-IV3	141	AZ ONLY	8 yrs	10/29/2008					OTHER
FLU-IV3	141	AZ ONLY	9 yrs	10/02/2009					OTHER
Td-ADULT	9	AZ ONLY	19 yrs	04/24/2020				XYZ321	OTHER

---

**RPMS Immunizations**  Filter to match selection

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
COV,PfrAdo	217	RPMS ONLY	23 yrs	07/29/2024	07/29/2024	0.3	PFIZER, INC	PFTRIS217	2017 DEMO CLINIC TEHRC
DTaP	20	RPMS+AZ	3 mths	12/12/2000					2017 DEMO CLINIC TEHRC
DTaP	20	RPMS+AZ	5 mths	02/13/2001				U0320A8	2017 DEMO CLINIC TEHRC
DTaP	20	RPMS+AZ	7 mths	04/16/2001					2017 DEMO CLINIC TEHRC
DTaP	20	RPMS+AZ	13 mths	10/16/2001				U0313AA	2017 DEMO CLINIC TEHRC
DTaP	20	RPMS+AZ	57 mths	06/28/2005		0.5		AC14A009BA	2017 DEMO CLINIC TEHRC
FLU,NOS	88	RPMS ONLY	23 yrs	04/24/2024	04/24/2024				Wagreens
FLU,NOS	88	RPMS+AZ	38 mths	11/19/2003					2017 DEMO CLINIC TEHRC
FLU,NOS	88	RPMS+AZ	5 yrs	10/27/2005					2017 DEMO CLINIC TEHRC
FLU-IV3	141	RPMS ONLY	23 yrs	04/17/2024	04/17/2024				Test

Figure 2-4: Immunization Reconciliation dialog

## 2.2.1 Add State Registry Vaccine as Historical Visit

- Select a **row** from the **State Registries** table.
  - Multiple rows can be selected, to allow for batch entry of immunizations.
  - The system highlights the selected row orange identifying it as being selected by the user. If there are partially matching items in the RPMS table, the table will adjust (filter) and display potential matches or removes all entries from view.
  - The system enables the **Add** button.
- Click the **Add** button (Figure 2-5).

The screenshot shows a window titled "Immunization Reconciliation" with an "Add" button that is highlighted in blue, indicating it is enabled. Below the title bar are two tables. The first table, "Immunization Reconciliation", has columns: Vaccine, CVX, Registry, Age@Visit, Visit Date, Administered On, Dose, Manufacturer, Lot Number, and Location. It contains one row: FLU-IV3, 141, AZ ONLY, 9 mts, 01/05/2006, (blank), (blank), (blank), UI764AA, OTHER. The second table, "RPMS Immunizations", has the same columns and includes a checkbox "Filter to match selection". It contains two rows: HEP B PED (8, RPMS-AZ, 1 mth, 05/21/2005, (blank), (blank), (blank), Mid Dak Med Center) and BOTULINUM (27, RPMS-AZ, 16 yrs, 04/13/2022, 04/13/2022, (blank), Adak Medical Center). At the bottom right are "OK" and "Cancel" buttons.

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
FLU-IV3	141	AZ ONLY	9 mts	01/05/2006				UI764AA	OTHER

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
HEP B PED	8	RPMS-AZ	1 mth	05/21/2005					Mid Dak Med Center
BOTULINUM	27	RPMS-AZ	16 yrs	04/13/2022	04/13/2022				Adak Medical Center

Figure 2-5: Immunization Reconciliation dialog Add Button enabled

The system opens the **Add External Immunization to Patient Chart** dialog (Figure 2-6 and Figure 2-7) prepopulated with data from State record. In lower right of dialog (if you selected more than one vaccine to add) you will see that it is displaying the first of two vaccines to be reconciled.

- Review the content and click the **OK** button.

Click the **Skip** button IF multiple vaccines were selected to be added, but the user decides to ignore a vaccine.

The screenshot shows a dialog box titled "Add external immunization to patient chart". It contains the following fields and controls:

- Add Historical Immunization** (Section Header)
- Vaccine:** Text box containing "FLU-IIV3".
- Documented By:** Text box containing "STRUBLE".
- Event Date:** Text box containing "04/17/2024 12:00 AM".
- Location:** Text box containing "OTHER".
- Lot:** Empty text box.
- Injection Site:** Empty text box.
- Volume:** Empty text box.
- Admin Notes:** Text area containing "Received from AZ State Registry query response on Sep 03, 2024@09:11:57".
- Buttons:** "OK" and "Cancel" buttons on the right side.

Figure 2-6: Add External Immunization dialog For Single Vaccine Add

The screenshot shows a dialog box titled "Add external immunization to patient chart". It contains the following fields and controls:

- Add Historical Immunization** (Section Header)
- Vaccine:** Text box containing "FLU-IIV3".
- Documented By:** Text box containing "STRUBLE".
- Event Date:** Text box containing "04/17/2024 12:00 AM".
- Location:** Text box containing "OTHER".
- Lot:** Empty text box.
- Injection Site:** Empty text box.
- Volume:** Empty text box.
- Admin Notes:** Text area containing "Received from AZ State Registry query response on Sep 03, 2024@09:11:57".
- Buttons:** "OK", "Skip", and "Cancel All" buttons on the right side.
- Page Indicator:** A green box at the bottom right containing "1 of 2".

Figure 2-7: Add External Immunization dialog for Multiple Vaccines Add

- To cancel the single or multiple adds, select the **Cancel** or **Cancel All** buttons.
- After all vaccines that were selected have been added, the State Registries table will remove those entries and add them to the RPMS table on the main **Immunization Reconciliation** dialog.
- On the main **Immunization Reconciliation** dialog, the user must click **OK** to finalize saved changes or the Cancel button to undo saved changes.

If the user selects the **Cancel** button, the system displays the **Cancel Reconciliation** dialog (Figure 2-8) with the following message:

“Are you sure you wish to cancel reconciliations in progress? # unsaved actions will be undone. (Where # is the number of unsaved actions.)”

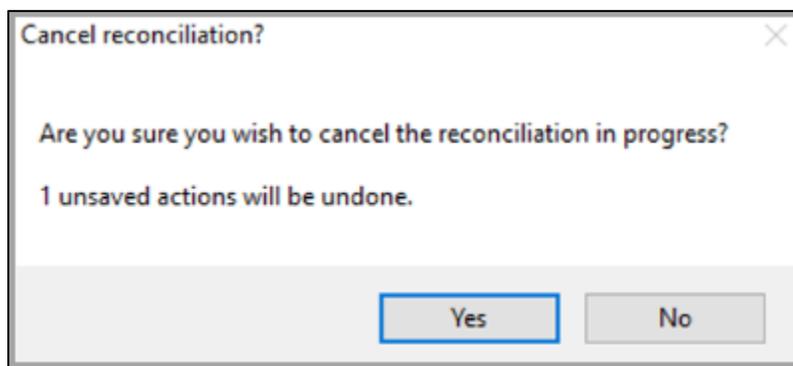


Figure 2-8: Cancel Confirmation dialog

If the user selects the **Yes** button, the **Immunization Reconciliation** dialog will close and return the user to the main Immunization module. The Immunization history table will now display those vaccines as **RPMS+<State>**.

## 2.2.2 Edit Existing EHR Immunization Entry with State Registry Vaccine

1. Select a row from the **State Registries** table.
  - The system enables the **Add** button.
  - The system highlights the selected row orange identifying it as being selected by the user. If there are partially matching items in the RPMS table, the table will adjust (filter) and display potential matches or removes all entries from view.
2. Select a row to update from the **RPMS Immunization** table.
  - The system enables the edit button (Figure 2-9).

**Immunization Reconciliation**

Add Edit

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
FLU-IIV3	141	AZ ONLY	9 mts	01/05/2006				U1764AA	OTHER

---

**RPMS Immunizations** \* Excludes locally-administered immunizations from locked visits  Filter to match selection

Vaccine	CVX	Registry	Age@Visit	Visit Date	Administered On	Dose	Manufacturer	Lot Number	Location
HEP B PED	8	RPMS+AZ	1 mth	05/21/2005					Mid Dak Med Center
BOTULINUM	27	RPMS+AZ	16 yrs	04/13/2022	04/13/2022				Adak Medical Center

OK Cancel

Figure 2-9: Immunization Reconciliation dialog Edit Button Enabled

3. Click the **Edit** button.

- The system opens the **Integrate External Immunization Into Existing Record** dialog (Figure 2-10), which is pre-populated with data from the RPMS record. The top of the dialog will display the difference between the State entry and the RPMS entry if the vaccine does not match.
- If the **Event** date does not match it will show the **RPMS Event** date and **State Registry Event** date in the event date section of the dialog.
- The system displays two option buttons, **RPMS** and the **Value**. This is the default but can be changed to the **External** option button and the **State Value**. The user needs to determine whether RPMS or External is the correct value to set and save the record.

Integrate external immunization into existing record

**Edit Historical Immunization**

Vaccine RPMS  HEP B PED  
External  FLU-IIV3

Documented By

Event Date RPMS   
External  01/05/2006

Location

Lot

Injection Site

Volume

Admin Notes  
Received from AZ State Registry  
query response on Sep 04,  
2024@10:46:08.

OK  
Cancel

Figure 2-10: Integrated External Immunization dialog

4. Review the **content** and make any appropriate changes (for example, if the option button default is not the desired value).
5. Click **OK**.
  - If the user wants to cancel the edit, click **Cancel**.
  - After the vaccine that was selected has been edited, the **State Registries** table will remove that entry and add that entry to the RPMS table on the main **Immunization Reconciliation** dialog.
  - On the main **Immunization Reconciliation** dialog, the user must click **OK** to finalize saved changes or **Cancel** to undo saved changes.
  - If **Cancel** is clicked, the system displays a **Cancel Reconciliation** confirmation dialog (Figure 2-11) with a message describing the number of unsaved actions that will be undone.

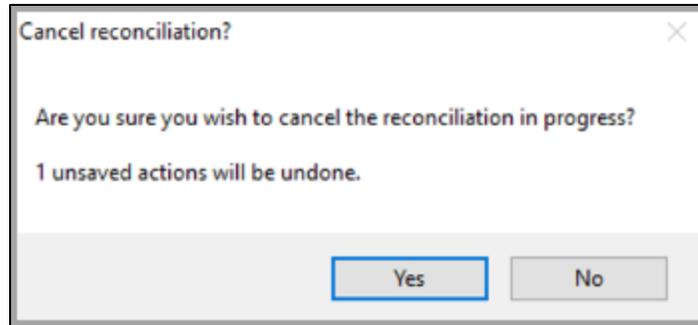


Figure 2-11: Cancel Reconciliation confirmation dialog

- If the user clicks the **OK** button, the **Immunization Reconciliation** dialog will close and return the user to the main **Immunization** module. The **Immunization History** table will now display those vaccines as **RPMS+<State>**.

## 2.3 Customizing the Immunization History Display

The **Immunizations** module allows users or sites to customize the **Immunization History** grid to improve usability. All changes will persist for a user but will not affect other users and can be removed later if desired without loss of data.

### 2.3.1 Sorting

- Each column can be sorted in multiple ways, as follows:
- Left-clicking sorts by age in the Age at Visit column.
- Left-clicking again reverses that sort.
- Left-clicking a third time returns the column to its original order.

Clicking the small **Funnel** icon () at the top of any column displays a check-box list of all items in the column. A check box can be selected so only those data display.

The **Small Funnel** icon () turns color to show that a filter is enabled (Figure 2-12).

Registry	Vaccine	Visit Date	Age@Visit	Location
RPMS ONLY	DTaP	10/16/2001	13 mths	2017 DEMO CL
RPMS ONLY	ACTHIB	10/16/2001	13 mths	2017 DEMO CL
RPMS ONLY	MMR	10/16/2001	13 mths	2017 DEMO CL
RPMS ONLY	IPV	10/16/2001	13 mths	2017 DEMO CL
RPMS ONLY	PCV-7	10/16/2001	13 mths	2017 DEMO CL
RPMS ONLY	VARICELLA	10/16/2001	13 mths	2017 DEMO CL

Figure 2-12: Selecting Just 13-Month-Old display example

### 2.3.2 Columns

When the component is installed, there are 17 columns initially displayed in the **Immunization History**. Some users may need to see all 17, but others may determine that not all columns are needed for their use. Columns can be hidden if desired, but the data is not removed, and this will not affect any other users.

To hide a column right-click any column header. Be aware that left-clicking a column sorts it. Right-click displays the list of all the columns that can be hidden.

**Note:** Some columns, such as **CVX Code**, **Vaccine**, **Registry**, and **Date**, do not appear on this list and cannot be hidden.

All columns selected with check marks will display. If a user does not want to see a particular column, such as manufacturer or volume, they can clear that check box and the column will no longer display (Figure 2-13) in their personal EHR. This setting will persist for future logins for that provider. Any of these check boxes can be cleared.

**Note:** To restore the original 17 columns, simply click **Restore Defaults**.

Hiding some columns may improve the display for the user, as follows:

Registry	CVX	Vaccine	Visit Date	Age@Visit	Location	Reaction	Volume	Inj Site	Lot	Manufacturer	VIS Date	Administered By	Admin Date	Admin Notes
RPMS ONLY 30	H8IG		08/21/2024	23 yrs	2017 DEMO CLINIC TEHR		0.05	Right Arm ID	BB123456	GLAXOSMITHKLINE	07/31/2024	STRUBLE	08/26/2024	
RPMS-AZ 114	Menactra		08/21/2024	23 yrs	2017 DEMO CLINIC TEHR		0.5	Left Thigh IM	U5567CA (KID5)	SANOFI PASTEUR	08/06/2021	STRUBLE	08/26/2024	
RPMS ONLY 217	COV.PkAdo		07/29/2024	23 yrs	2017 DEMO CLINIC TEHR		0.3	Right Thigh SQ	PFTR15217	PFIZER, INC	12/08/2022	STRUBLE	07/29/2024	
RPMS ONLY 33	PNEUMO-PS		07/08/2024	23 yrs	Other								07/08/2024	Received from AZ State Registry query response on Aug 26, 2024@08:29:03
RPMS ONLY 88	FLU-INDS		04/24/2024	23 yrs	Vadigrens								04/24/2024	
RPMS-AZ 186	FLU-cd4		04/24/2024	23 yrs	Vadigrens								04/24/2024	
RPMS-AZ 141	FLU-INV3		04/17/2024	23 yrs	Test								04/17/2024	
RPMS-AZ 113	T6-ADUL Tpf		04/24/2020	19 yrs	2017 DEMO CLINIC TEHR		0.5	Left Deltoid IM	XYZ321	SANOFI PASTEUR	04/11/2017	ALLEN	04/24/2020	Can you see this note?
RPMS-AZ 141	FLU-INV3		12/08/2015	15 yrs	Sioux Falls Sanford								12/08/2015	
RPMS-AZ 113	FLU-LAR3		08/11/2012	12 yrs	St. Joe's		0						08/11/2012	
RPMS-AZ 62	HPV-4v		04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	1281AA	MERCK & CO	05/03/2011	WHITEMOUSE	04/05/2012	
RPMS-AZ 114	Menactra		04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	U4028AB	SANOFI PASTEUR	10/14/2011	WHITEMOUSE	04/05/2012	
RPMS-AZ 115	Tdap		04/05/2012	11 yrs	2017 DEMO CLINIC TEHR		0.5	Left Deltoid IM	ACS2805AA	GLAXOSMITHKLINE	11/18/2008	WHITEMOUSE	04/05/2012	
RPMS-AZ 141	FLU-INV3		10/07/2011	11 yrs	St. Joe's		0						10/07/2011	
RPMS-AZ 18	RABIES-IM		04/28/2011	10 yrs	2017 DEMO CLINIC TEHR								04/28/2011	
RPMS-AZ 62	HPV-4v		11/30/2010	10 yrs	2017 DEMO CLINIC TEHR		0.5	Right Deltoid IM	0766Z	MERCK & CO.	03/30/2010	SWENSON	11/30/2010	
RPMS-AZ 141	FLU-INV3		11/22/2010	10 yrs	Childrens Specialty Clinic - Sanford		0						11/22/2010	

Figure 2-13: Immunization History Display with Less Columns

### 2.3.3 Group By

By left-clicking any column header and dragging the column up into the **Information History** label area, the following message appears:

“Drag a header here and drop it to group by that column”

The user releases the left-click and the **Immunization History Table** is now grouped by that column (Figure 2-14), already expanded with the data rows. This can be done for multiple columns. Clicking the **X** in each item will remove it from the grouping.

Registry	CVX	Vaccine	Visit Date	Age@Visit	Location	Reaction	Volume	Inj Site	Lot	Manufacturer	VIS Date	Administered By	Admin Date	Admin Notes
2017 DEMO CLINIC TEHR														
RPMS-AZ 48	ACTHB		10/16/2001	13 mths	2017 DEMO CLINIC TEHR				UA53DA					
RPMS-AZ 48	ACTHB		04/16/2001	7 mths	2017 DEMO CLINIC TEHR									
RPMS-AZ 48	ACTHB		02/13/2001	5 mths	2017 DEMO CLINIC TEHR									
RPMS-AZ 48	ACTHB		12/12/2000	3 mths	2017 DEMO CLINIC TEHR									
ACTHB														
COV.PkAdo														
2017 DEMO CLINIC TEHR														
RPMS ONLY 217	COV.PkAdo		07/29/2024	23 yrs	2017 DEMO CLINIC TEHR		0.3	Right Thigh SQ	PFTR15217	PFIZER, INC	12/08/2022	STRUBLE	07/29/2024	
DTaP														
2017 DEMO CLINIC TEHR														
RPMS-AZ 20	DTaP		06/28/2005	57 mths	2017 DEMO CLINIC TEHR		0.5	Right Thigh IM	AC14A009BA		07/30/2001	LANGERCOCK		
RPMS-AZ 20	DTaP		10/16/2001	13 mths	2017 DEMO CLINIC TEHR				U0313AA					
RPMS-AZ 20	DTaP		04/16/2001	7 mths	2017 DEMO CLINIC TEHR									
RPMS-AZ 36	DTaP		05/13/2001	6 mths	2017 DEMO CLINIC TEHR									

Figure 2-14: Immunization History Grouped window

### 2.3.4 Rearranging Columns

Columns can be rearranged for a particular user (Figure 2-15). A user may want to move registry information to the far right and display vaccines or dates on the left. To do this, simply grab the column by left-clicking, and drag it to the desired location. Again, this does not affect any other users’ displays.

Vaccine	Visit Date	Admin Date	Age@Visit
COV,Jsx	05/07/2021	05/07/2021	20 yrs
COV,ModBbv	12/27/2022	12/27/2022	22 yrs
COV,Pfr	01/31/2023	02/07/2023	22 yrs
DTaP	12/12/2000		3 mths
DTaP	02/13/2001		5 mths
DTaP	04/16/2001		7 mths
DTaP	10/16/2001		13 mths
DTaP	06/28/2005		57 mths
FLU,NOS	11/19/2003		38 mths
FLU,NOS	10/27/2005		5 yrs
FLU-IIV3	10/29/2008		8 yrs
FLU-IIV3	10/02/2009		9 yrs
FLU-IIV3	11/22/2010	11/22/2010	10 yrs

Figure 2-15: Columns Rearranged example

## 2.4 Selecting a Vaccine

When selecting a vaccine, there are two options:

- Selecting Items From the Forecaster Pane–Section 2.4.1 (Sorting)
- Selecting a Vaccine Not in Forecast Pane–Section 2.4.2 (Columns)

### 2.4.1 Selecting Items from the Forecaster Pane

To select from **Forecaster** pane, double-click the name of the vaccine and the **Vaccine Search** dialog displays with the vaccine information pre-populated.

The selection list on the **Vaccine Search** dialog (Figure 2-16) is initially populated by default with Show only active vaccines with a Lot number. This can be changed, if desired, by selecting the **Show All Active Vaccines** or **Show All Vaccines** option buttons (a new column to the far left in the records table displays whether the vaccine is active or inactive).

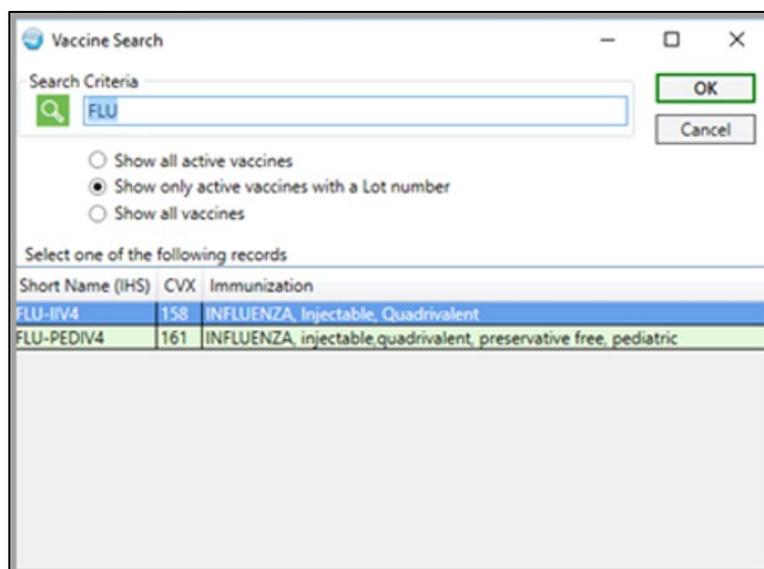


Figure 2-16: Vaccine Search dialog

**Note:** Only Lot Numbers designated to the facility to which the user is logged on display for selection.

Highlight the **correct entry** and click **OK**. This brings you to the **Add a Vaccine** field (refer to **Selecting a Vaccine** for more information).

## 2.4.2 Selecting a Vaccine Not in Forecast Pane

To add an immunization not displayed in the **Forecast Pane**, do the following:

1. Click the **Actions** drop-down list on the far right-side of the **Immunization History** pane.
2. Click **Add** from this list.
3. Search for the **vaccine**. The search value can either be the first few letters (not case sensitive) of an immunization name or the **CVX** code.
4. To select an entry, double-click the **vaccine name**, or highlight it and click **OK**. (Otherwise, click **Cancel**.)

This brings the user to the **Add a Vaccine** field (refer to Section 2.4 for more information).

**Note:** If you select an Inactive Vaccine, it will be marked as a historical vaccination entry.

## 2.5 Adding an Immunization

Select an immunization as detailed in Section 2.3.

If you choose to add an immunization for which the patient has a related contraindication, the application displays an alert (Figure 2-17) and asks if you want to continue.

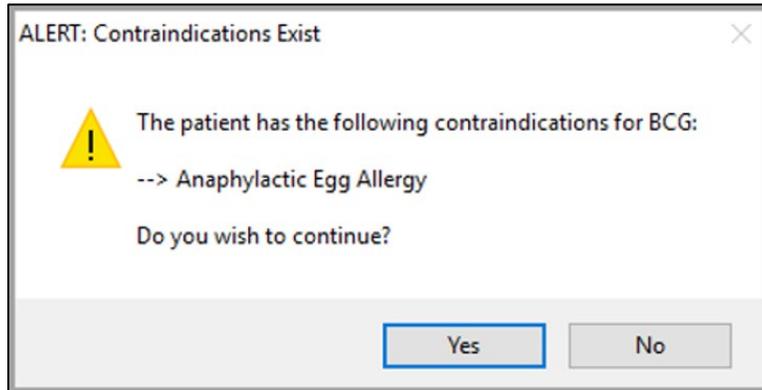


Figure 2-17: Contraindication Exist Alert dialog

The following option buttons address information about these functions:

- Current (Section 2.5.1)
- Historical (Section 2.5.2)
- Not Done (Section 2.5.3)

### 2.5.1 Current

There are several fields in the **Add Vaccine** dialog (Figure 2-18).

Figure 2-18: Add Vaccine dialog

The **Ordered By** field is defaulted with a provider assigned to the visit. The system first looks at the primary provider for the visit, and if they hold both **Provider** and **ORES** keys, defaults that user as the ordering provider.

If that user does not, it will then evaluate if the logged-in user is a visit provider with both keys. If user does not, the system will assign **Ordered By** the visit provider sequenced in the **Encounter Component**, as long as those providers hold both keys.

Users can change the **Ordered By** fields by clicking the **Magnifying Glass** icon (). The **Ordered By** search only returns values for users that hold both the **Provider** key and the **ORES** key.

The **Administered By** field defaults with the logged-in user and can be changed by clicking the **Magnifying Glass** icon (.

1. In the **Lot** field, select the applicable lot and manufacturer from the drop-down menu.

**Note:** Only **Lot Numbers** designated to the facility to which the user is logged on display for selection.

2. Select the **Injection Site** from the drop-down list.
    - For common vaccines, the application automatically loads default values for the **Volume** and **Vaccine Information Sheet**. The **VIS Presented** date defaults to the date of this visit. You can change any of these fields.
- Note:** If you select an expired lot number, a warning message is displayed in bold red lettering above the **Lot** field.
- The **Given** field contains the exact date and time that the immunization was administered. The default is the current date and time.
  - If you counseled the patient/family about the immunization, select the **Patient/Family Counseled** check box. Once saved, the EHR populates the **Vaccinations** component and the **Education** component with a record.
  - **Optional.** In the **Vac. Eligibility** field, users may click to select an applicable vaccination eligibility from the drop-down menu.
3. In the **Admin Notes** field, type any applicable notes.
  4. When the **Add Immunization** dialog is complete, click **OK** to add the vaccination to the **Immunization History** field. (Otherwise, click **Cancel**.)

**Note:** The **OK** button will be disabled until all required fields have been completed. There is a mouse-over tool tip letting the user know which fields must be completed.

## 2.5.2 Historical

Historical immunizations are those that were given in the past and typically would be for an outside facility or place. Adding a historic immunization causes a historic visit to be created that cannot be billed or exported.

**Note:** You can add a historical record by not selecting a visit and clicking the **Add** button on the **Vaccinations** group box. The **Add Historical Immunization** dialog displays.

To add a historical record:

1. Select the **Historical** option button () on the **Add Immunization** dialog to display the **Add Historical Immunization** dialog (Figure 2-19).

Figure 2-19: Add Historical Immunization dialog

2. Manually enter the **event date** (must be historical) or click the **calendar**.
3. Populate the **Location** field.
  - If the location is an official IHS facility, select the **IHS/Tribal Facility** option button ( IHS/Tribal Facility).
  - You can select the location from the **Lookup Location** dialog (Figure 2-20) by clicking the **Magnifying Glass** icon () and entering the first few letters of the location.

Figure 2-20: Lookup Location dialog

- If the location is not an official IHS facility, select the **Other** option button. Enter the non-official location (for example, **Dr. Name Example**).
4. In the **Admin Notes** field, type any notes, as needed.
  5. When the **Add Historical Immunization** dialog is complete, click **OK** to add the historic vaccination to the **Immunization History Table**. (Otherwise, click **Cancel**.)

**Note:** The **OK** button will be disabled until all required fields have been completed. There is a mouse-over tool tip letting the user know which fields must be completed.

### 2.5.3 Not Done

1. If an immunization is not done or is refused, select the **Not Done** option button ( Not Done) on the **Add Vaccine** dialog (Figure 2-21).

The screenshot shows the 'Add Vaccine' dialog box with the following details:

- Vaccine:** COVID-19 vaccine, vector-nr, rS-Ad26, PF, 0.5 mL
- Documented By:** DEMO,DOCTOR
- Event Date:** 03/03/2023
- Reason:** A dropdown menu is open, listing various reasons. 'Contraindicated' is highlighted in blue.
- Radio Buttons:** On the right side, the 'Not Done' radio button is selected, while 'Current' and 'Historical' are unselected.

Figure 2-21: Add Historical Immunization dialog

2. Select the **date** of this event and a reason from the drop-down list.

3. Click **OK** when the dialog is complete. This adds an **Immunization Refusal Record** to the **Immunization History** field, as well as adding a **Refusal to the Personal Health** component. (Otherwise, click **Cancel**.)

**Note:** The **OK** button will be disabled until all required fields have been completed. There is a mouse-over tool tip letting the user know which fields must be completed.

## 2.6 Editing a Vaccination

Make sure a visit is selected. Follow these steps to edit a vaccination:

1. Highlight a **vaccination record** on the **Immunization History** grid that you want to edit.

**Note:** Vaccinations can only be edited until the visit is locked.

2. Select **Edit** from the **Actions** drop-down list at the top right of the **Immunization History Table** or highlight and right-click the immunization to edit. The **Edit Immunization** dialog (Figure 2-22) displays.

If the visit is locked, the **Edit** option will be grayed out and cannot be selected. The existing information about the selected record displays.

Figure 2-22: Edit Immunization dialog

**Note:** You can edit the **Dose Override** field only if you have been assigned the **BIZ EDIT PATIENTS** security key.

The **Dose Override** field affects the forecasting. It ignores invalid doses and counts forced, valid doses. The field is used to force a dose as valid (if given a day or so early but will not affect school) or invalid (due to expired vaccine, and so on).

3. Enter a **reaction** by selecting from the drop-down list (Figure 2-23) for the **Reaction** field.

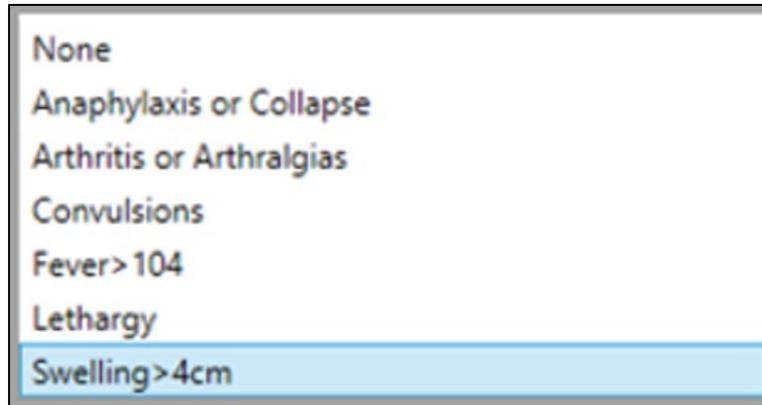


Figure 2-23: Reactions in drop-down list

If one of the following is selected, then a corresponding contraindication is automatically added.

- Anaphylaxis
- Convulsions
- Lethargy
- Fever >104

Otherwise, you are asked if it should be added as a contraindication for the patient (Figure 2-24). If you answer yes, a contraindication of **Other Allergy** is added.

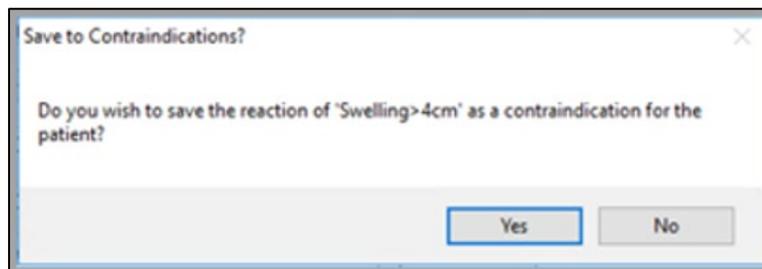


Figure 2-24: Information Message when Saving Refusal

4. Click **Yes** to save the reaction as a contraindication. (Otherwise, click **No**.)
5. When the **Edit Immunization** dialog is complete, click **OK** to change the information about the selected record. (Otherwise, click **Cancel**.)

## 2.6.1 Deleting a Vaccination

Follow these steps to delete a vaccination:

1. Highlight a **vaccination record** in the **Immunization History** that you want to delete.

Immunizations can only be deleted by the individual who entered them. Otherwise, the following message (Figure 2-25) displays:

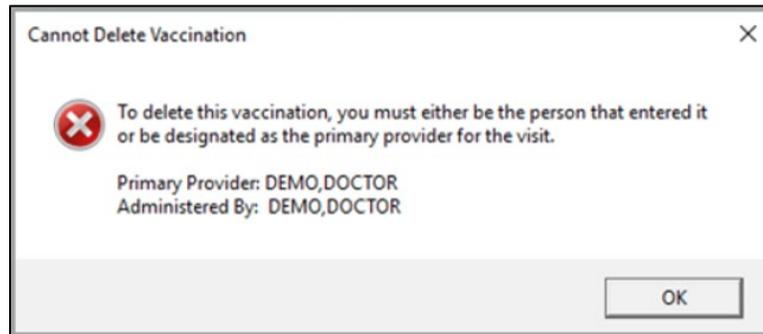


Figure 2-25: Cannot Delete Vaccination warning message

**Note:** Vaccinations can only be deleted on an unlocked visit.

2. Right-click and select **Delete Immunization** or select **Delete** from the drop-down **Actions** menu at the far right of the **Immunization History** field. This displays the **Remove Immunization?** warning message (Figure 2-26).

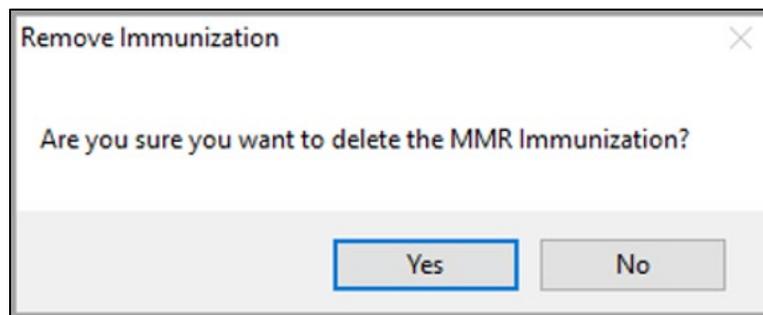


Figure 2-26: Remove Immunization information message

3. Click **Yes** to remove the immunization from the **Immunization History** grid. (Otherwise, click **No**.)

## 2.7 Action Items

This section provides information about the selections on the **Actions** drop-down menu (Figure 2-27) located at the far right of the **Immunization History** field.

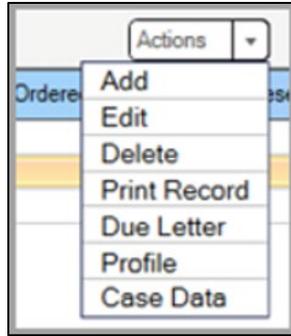


Figure 2-27: Actions drop-down menu

**Important:** The **Case Data** option only displays in the Action drop-down list if the user holds the appropriate **BIZ Manager** key.

For **Add**, **Edit**, and **Delete**, refer to the following topics:

- Adding an Immunization (Section 2.5)
- Editing a Vaccination (Section 2.6)
- Deleting a Vaccination (Section 2.6.1)

**Note:** For **Actions List** selections with pop-up windows, you can change the font size of the text displayed in this pop-up by adjusting the size in the **Font Size** field (enter manually or use the **Up** and **Down** arrows). This does not change the size of the text on the output (when you print).

## 2.7.1 Print Record

1. Select **Print Record** from the **Action** list (or by right-clicking anywhere in the **Immunization History Table**) to display/print the **Official Immunization Record** information (Figure 2-28) for the current patient.

Print Record

OFFICIAL IMMUNIZATION RECORD  
Indian Health Service  
P. O. Box 248  
Lower Brule, SD 57548

15-Feb-2023  
Date of Birth: 29-Oct-2017 (5 yrs)  
Chart#: 440302

CHILD DEMO  
FRONT ST.  
BOZEMAN, MT 98765

Our records show that CHILD has received the following:

Immunization	Date Received	Location
DTaP	26-Jul-2018	Claremore Hospita
DTaP	15-Nov-2018	Claremore Hospita
DTaP	09-Jun-2020	Walmart
DTaP	01-Aug-2022	Walgreens
IPV	26-Jul-2018	Clare
IPV	15-Nov-2018	Claremore Hospita
FOLIO,MOS	01-Aug-2022	Walreens
HIB,MOS	01-Aug-2022	Walgreens
ACTHIB	01-Aug-2022	Walgreens
PEDVAXHIB (COMVAX)	01-Aug-2022	Walgreens
HBIG	01-Aug-2022	Walgreens
HEP B PED	01-Aug-2022	Walgreens
HEP B PED (COMVAX)	01-Aug-2022	Walgreens
HEP B PED	15-Feb-2023	2017 Demo Clinic
MMR	26-May-2020	2017 Demo Clinic
VARICELLA	01-Aug-2022	Walgreens
FLU-cc14	01-Aug-2022	Wlagreens
PNEUMO-PS	27-Jun-2022	2017 Demo Clinic
PCV-13	01-Aug-2022	Wlagreens

Font Size: 9 | Print... | Close

Figure 2-28: Official Immunization Record

**Note:** The **Print Record** button requires that a letter template has been selected (in RPMS).

- Click **Print** to choose a printer and to output the (entire) contents of this pop-up to the specified printer.

Users are able to highlight and copy selected text and then paste it into any free-text field within the EHR or into another application (like **MS Word**).

**Note:** The **Print** button may not appear. It depends on how your application is configured.

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

## 2.7.2 Due Letter

Select **Due Letter** from the **Action** list, or by right-clicking anywhere in the **Immunization History Table**, to display/print the **Immunizations Due Letter** information (Figure 2-29) for the current patient.

The **Due Letter** selection requires that a letter template has been selected (in RPMS).

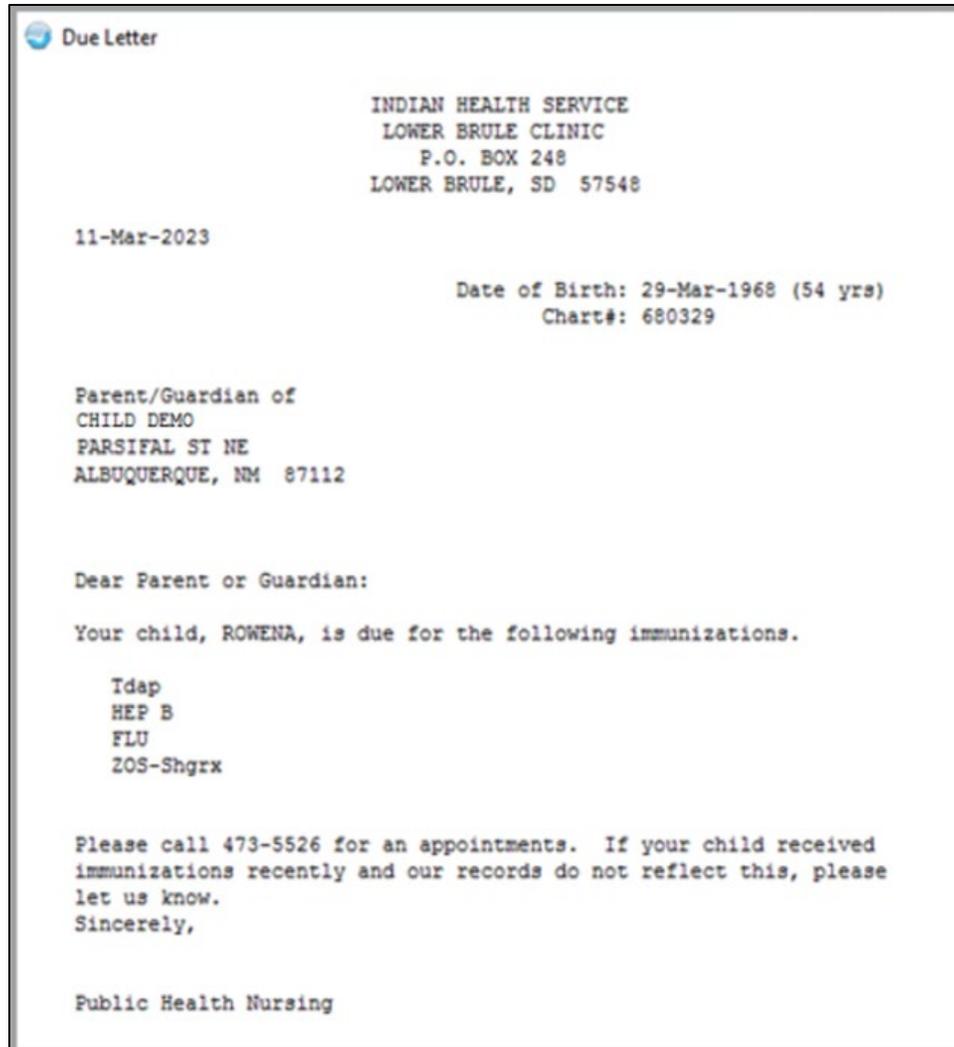


Figure 2-29: Due Letter example

### 2.7.3 Profile

1. Select **Profile** from the **Action** drop-down list (or on the right-click menu) in the **Immunization History Table** to display/print the **Immunization Profile** dialog (Figure 2-30). This provides information about the patient's immunization profile.

**Note:** This selection requires that the **Forecaster** is installed, and the immunization site parameters must be configured to point to the **Forecaster**.

Immunization Profile				
Patient: CHILD DEMO		DOB: 29-Mar-1968 (54 yrs)		
HLN ICE Forecaster v1.37.2 for: 03/11/2023 (run: 03/11/2023 @ 11:06)				
--- IMM HISTORY EVALUATION ---				
Date	CVX	Vaccine (combo)	Status - Reason	
08/01/2021	207	COV,Mod	VALID	
09/04/2021	207	COV,Mod	VALID	
10/07/2021	207	COV,Mod	VALID	
03/11/2023	212	COV,Jan	INVALID: Reason not given	
--- FORECAST ---				
DUE:				
Vaccine	Status	Earliest	Recommended	Overdue
Tdap	Due now	03/29/1975	03/29/1975	03/29/1975
HEP B,NOS	Due now	03/29/1987	03/29/1987	NO DATE
MGR	* Series assumed completed.			
FLU,NOS	Due now	07/01/2022	07/01/2022	NO DATE
ZOS-Shgrx	Due now	03/29/2018	03/29/2018	NO DATE
FUTURE:				
Vaccine	Status	Earliest	Recommended	Overdue
PNEUMO,NOS	Due in future	NO DATE	03/29/2033	NO DATE
COV,NOS	* Contraindicated due to patient history.			
COMPLETE:				
Vaccine	Status			
None				
HIGH RISK:				
Vaccine	Status			
None				

Figure 2-30: Immunization Profile Information

- Click **Print** to choose a printer and to output the (entire) contents of this pop-up to the specified printer. The pop-up has a right-click menu where you can copy selected text and paste it into any free-text field within the EHR or into another application (like MS Word).

**Note:** The **Print** button may not appear. It depends on how your application is configured.

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

## 2.7.4 Case Data

- Select **Case Data** from the **Actions** drop-down list or from the right-click menu in the **Immunization History** field to view/edit the **Immunization Register** data for the patient. The **Edit Patient Case Data** dialog (Figure 2-31) displays.

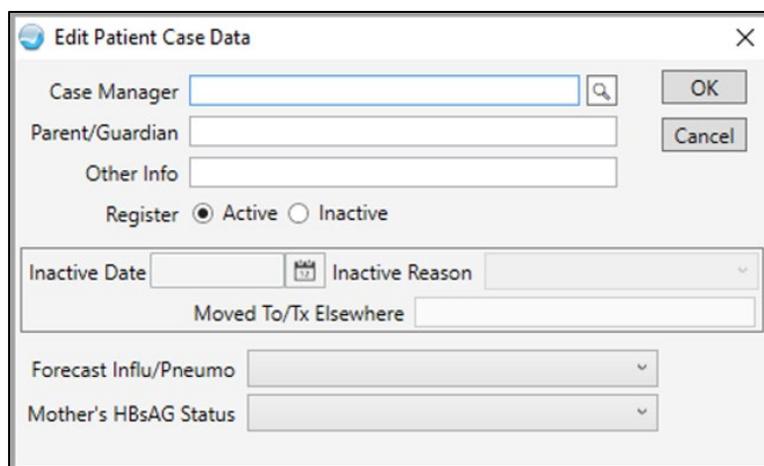


Figure 2-31: Edit Patient Case Data

### 2.7.4.1 Register Active/Inactive (Option Buttons)

This indicates the status of the patient in the **Immunization Register**. Since the **Immunization Register** is a very actively managed register and reports only those patients that have an **ACTIVE** status, the panel is used to case manage the **Immunization Register**.

All children from birth to 36 months that live in **Government Performance and Results Act of 1993 (GPRA)** communities are automatically **ACTIVE**. On review of children, some are changed to **INACTIVE** if they fit the **MOGE (Moved or Going Elsewhere)** criteria.

When you choose to change to **INACTIVE** status, you must justify or explain why. In the **Moved To/Elsewhere** field, indicate where the patient went, such as El Rio Clinic for example. The **Inactive Date** (Figure 2-32) is very important because the child is included in all reports up to that inactive date. Since children and their parents do not report that they have moved away (they just stop coming to the clinic), this function gives those producing **GPRA** reports a way to have a more accurate denominator when tracking.

Figure 2-32: Inactive Date Group Box fields

If a name is included in the **Parent/Guardian** field, that information is included in the reminder letters.

The **Other** Info field is where the **Case Manager** can enter anything that might be valuable.

1. Populate the **remaining field** by selecting from the **drop-down** lists.
2. Click **OK** to update the **Immunization Register** with the entered data. (Otherwise, click **Cancel**.)

## 2.8 Contraindications Group Box

If the patient has had a contraindication or refusal to an immunization, it can be recorded with the corresponding reason being specified. Any contraindications entered for the patient are displayed in the **Immunization** component, and you are alerted if the associated vaccine is subsequently selected.

### 2.8.1 Adding a Contraindication

Make sure a visit is selected. To add patient contraindications, follow these steps:

1. Click **Add** on the **Contraindications** group box (or select **Add Contraindication** on the right-click menu) to display the **Enter Patient Contraindication** dialog (Figure 2-33).

Figure 2-33: Enter Patient Contraindication dialog

2. Click the **Magnifying Glass** icon () at the end of the **Vaccine** field to display the **Vaccine Selection** dialog. Here you select a vaccine (refer to Section 2.4 for more information). The selected vaccine displays in the **Vaccine** field of the **Enter Patient Contraindication** dialog.
3. Click **Yes** to continue on the **Enter Patient Contraindication** dialog. (Otherwise, click **No**.)
4. Select the **Contraindication Reason**.
5. When the **Enter Patient Contraindication** dialog is complete, click **Add** to add the contraindication to the **Contraindication** panel. (Otherwise, click **Cancel**.)

The contraindication displays in the **Contraindications** group box and in the patient's **Official Immunization Record**.

## 2.9 Displaying Visit Detail

The **Immunization** component has the **Display Visit Detail** option on the right-click menu.

1. Select any **immunization record** on the **Immunization History Table** and select **Visit Detail**. The **Visit Detail** dialog (Figure 2-34) displays.

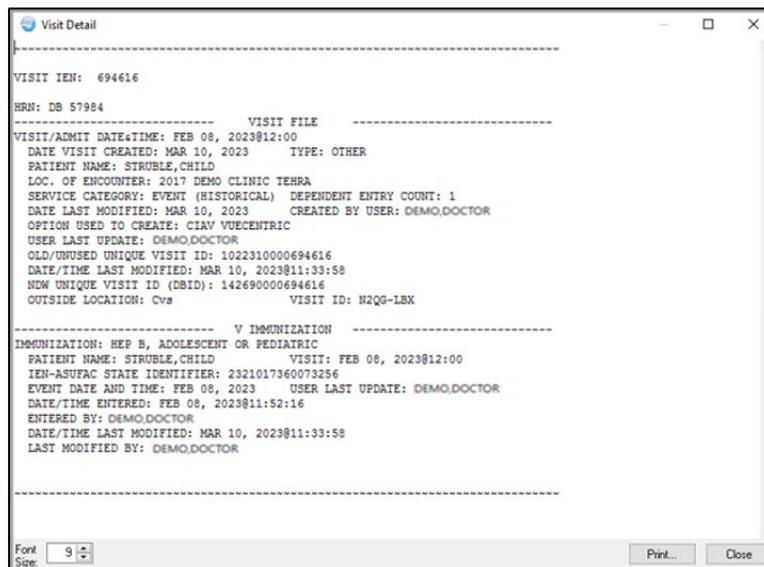


Figure 2-34: Visit Detail example

2. Click **Print** to choose a printer and to output the (entire) contents of the **Visit Detail** to the specified printer. Be aware that the **Print** button may not be there. It is according to how each application is configured.

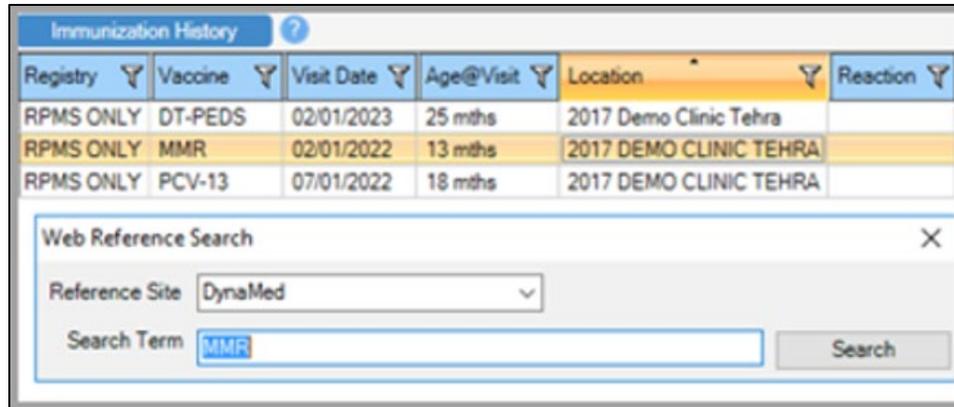
**Note:** You can change the font size of the text displayed in the **Visit Detail** dialog by adjusting the size in the **Font Size** field (enter manually or use the **Up** and **Down** arrows). This does not change the size of the text on the output (when you print).

The **Visit Detail** has a right-click menu where you can copy selected text and paste it into any free-text field within the EHR or into another application (like **MS Word**).

3. Click **Close** to dismiss the **Visit Detail** dialog.

## 2.10 Web Reference

If the user selects and highlights any entry in the **Immunization History Table** (Figure 2-35) and clicks the **Information** button () found at the very top of the **Immunization Record** (above the **Forecast** pane) or selects the **Web Reference** option by right-clicking the item. This will take the user to a website for the topic associated with the selected record. The **Search Term** field will be pre-populated with the selected vaccine.



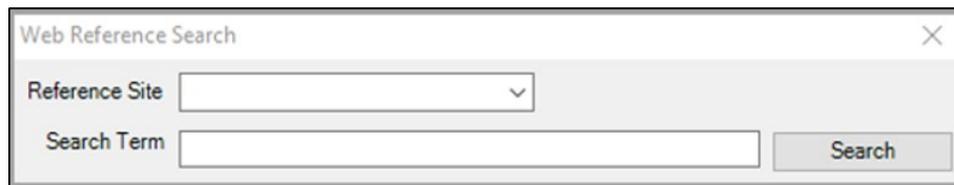
Registry	Vaccine	Visit Date	Age@Visit	Location	Reaction
RPMS ONLY	DT-PEDS	02/01/2023	25 mths	2017 Demo Clinic Tehra	
RPMS ONLY	MMR	02/01/2022	13 mths	2017 DEMO CLINIC TEHRA	
RPMS ONLY	PCV-13	07/01/2022	18 mths	2017 DEMO CLINIC TEHRA	

Web Reference Search	
Reference Site	DynaMed
Search Term	MMR
Search	

Figure 2-35: Immunization History Table

If there are no immunization records present or if no record is selected, clicking the **Information** button (  ) or selecting the **Web Reference** option on the right-click menu displays the **Web Reference Search** dialog (Figure 2-36).



Web Reference Search	
Reference Site	
Search Term	
Search	

Figure 2-36: Web Reference Search dialog

Select a **Reference Site**, if needed. The default is the **DynaMed** website. After entering a search term and clicking **Search**, the selected website for the specified term appears.

You can change to another website by selecting from the **Reference Site** drop-down list.

## 3.0 Integrated Problem List (IPL)

The **Integrated Problem List (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

### 3.1 Orientation

At the top of the **Problem List** window of the **IPL** component (Figure 3-1) are the following features:

- Buttons
- Tabs
- Columns



Figure 3-1: IPL Problem List main window

#### 3.1.1 Features

- **Asterisk**—An asterisk in the **Provider Narrative** column (Figure 3-2) indicates problems that are not SNOMED encoded. Since all new entries must be SNOMED coded, these asterisks are not common and will only display with older entries. As these legacy entries are updated to SNOMED, the asterisks will disappear.

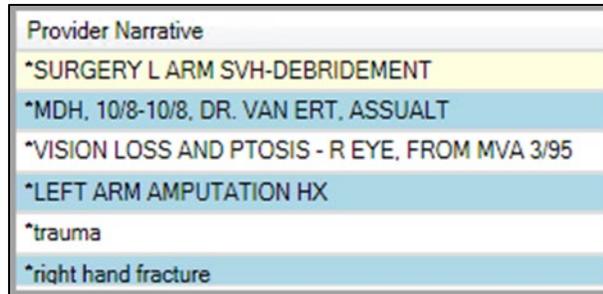


Figure 3-2: Problems Not SNOMED Encoded window

- Map Source**—Briefly rest the mouse pointer over the **code** in the **ICD** column to view a window of the map source advice (Figure 3-3), based on the **SNOMED CT** code.

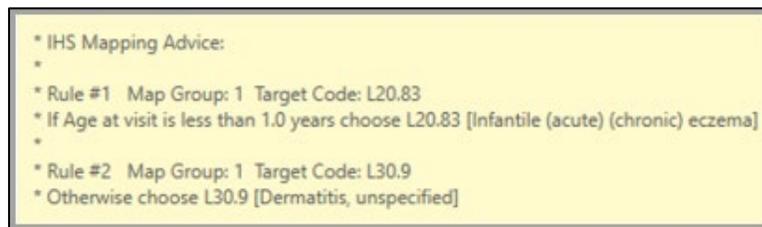


Figure 3-3: Map Source window

- Buttons Disabled**—For problems with a non-coded **SNOMED** code, the **Edit** and **POV (Purpose of Visit)** buttons are disabled.
- Viewing Problem Details**—Double-click anywhere in a line item to view the **Problem Details** window (Figure 3-4).

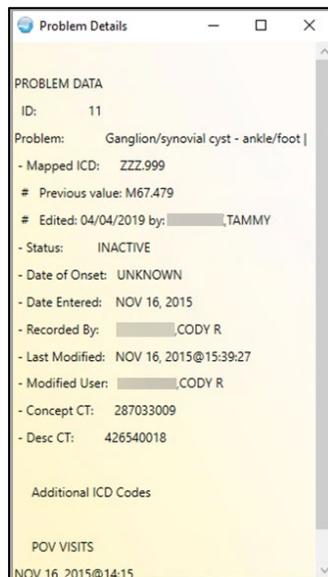


Figure 3-4: Problem Details window

- **Right-Click Menu**—Right-click anywhere on a diagnosis line to open the **Right-Click** menu (Figure 3-5).

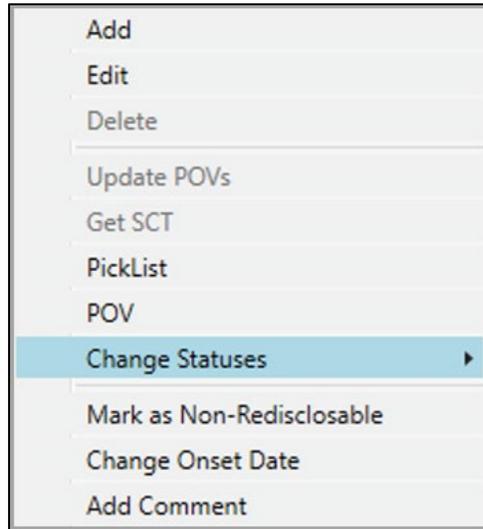


Figure 3-5: Right-Click menu

- **Add:** To add a problem, refer to Section 3.8.1 for details.
- **Edit:** To edit an existing problem. Opens the **Edit Problem** dialog. Refer to Section 3.8.2 for details.
- **Delete:** To delete the selected problem. Refer to Section 3.8.4 for details.
- **Update POVs:** To update a **POV**. Refer to Section 3.4 for details.
- **Get SCT:** To update a historical **ICD 9** entry. Opens the **SNOMED CT Lookup** dialog. Refer to Section 3.3 for details.
- **PickList:** Click the **Pick List** button to select **SNOMED CT** descriptions by defined pick lists. Refer to Section 3.5 for details.
- **POV:** To flag an outpatient problem as **POV** and to flag an inpatient problem as used for inpatient. This allows a provider to add visit, care plan, or goal activity data. Refer to Section 3.4 for details.
- **Change Statuses:** To change the status of an entry, select **Change Statuses** to display the list of available statuses.
  - **Chronic**
  - **Episodic**
  - **Sub-acute**
  - **Personal History**
  - **Inactive**
  - **Social/Env**
  - **Routine/Admin**

- **Mark as Non-Redisclosable:** Places check in NR column and identifies information not to be disclosed to another site or provider without patient permission.
- **Change Onset Date:** Allows the Onset Date to be changed.
- **Add Comment:** Refer to Section 3.8.2.1 for more information.

### 3.1.2 Buttons

A row of buttons (Figure 3-6) are located at the top of the IPL window.



Figure 3-6: IPL Window Buttons

- **Expand All/Collapse All button:** Enables the user to expand or collapse all problems to view the care planning activity. Refer to Section 3.9 for details.
- **Ed button (Ed):** Click this button for a direct link to **MedlinePlus**. Refer to Section 3.6 for details.
- **Clinical Decision Support button (i):** Click this button to display the **Web Reference Search** dialog (Figure 3-7). Select the reference site you want to view from the drop-down list and click Search. Refer to Section 3.7 for details.

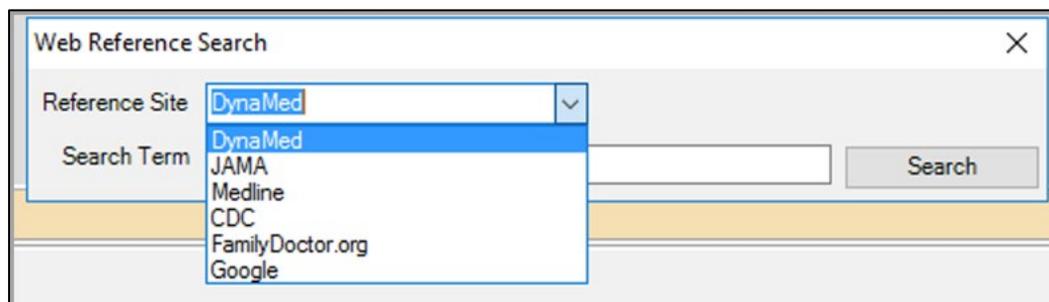


Figure 3-7: Web Reference Search dialog

- **Update POVs:** Updates any changes made to **IPL POV** list.
- **Get SCT button:** Click this button to look up the **SNOMED CT** code for an entry uncoded in SNOMED.
- **Pick List button:** Click this button to select **SNOMED CT** descriptions by defined pick lists.
- **POV button:** Click this button to mark the problem as the purpose of visit and to add visit, care plan, or goal activity data.
- **Add button:** Click this button to add a problem. Refer to Section 3.8.1 for details.

- **Edit button:** Click this button to edit an existing problem. Refer to Section 3.8.2 for details.
- **Delete button:** Click this button to delete a selected problem. Refer to Section 3.8.4 for details.

### 3.1.3 Tabs

Select a **tab** (Figure 3-8) to filter the problem list(s) associated with that status.



Figure 3-8: IPL Tabs

**Note:** Most tabs only display when information is included under that topic.

- **Core Problems**—(Can be configured to display several status at the same time)
- **Sub-acute**
- **Chronic**
- **Personal Hx**
- **Episodic**
- **Routine/Administrative**
- **Inactive**

### 3.1.4 Columns



Figure 3-9: IPL Columns

Columns on the main display window (Figure 3-9 and Figure 3-10) 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.

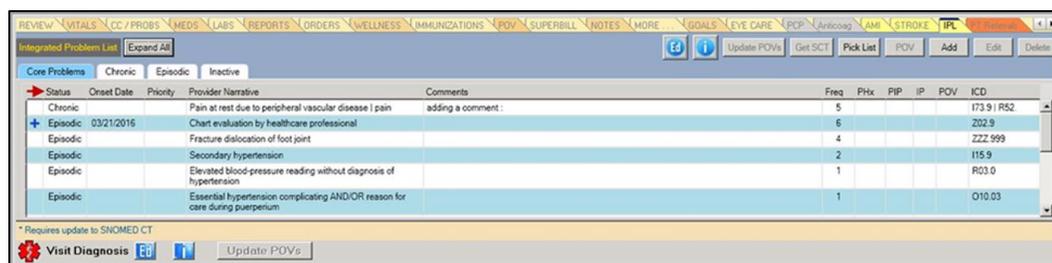


Figure 3-10: IPL Columns window

Right-clicking any column header displays the list of available columns (Figure 3-11) that can be displayed.

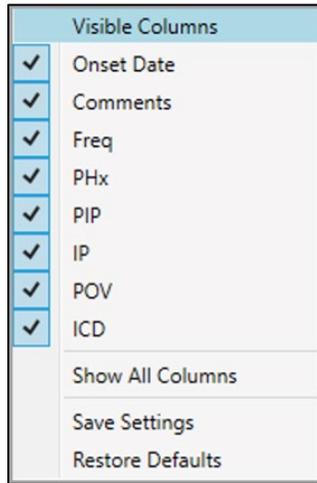


Figure 3-11: Available Columns

- Plus Sign:** Clicking this sign (Figure 3-12), which only displays when care planning has been added to a problem, opens the **Care Planning** information. Refer to Section 3.9 for details on using this feature.

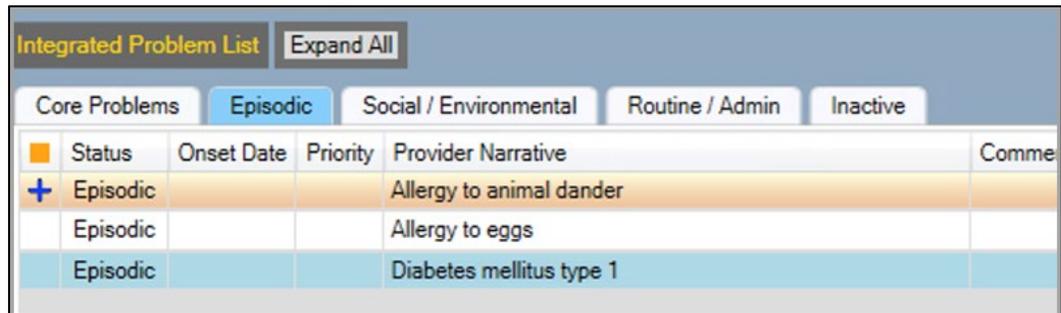


Figure 3-12: Plus Sign in IPL column

Clicking the **PRVs** button (Figure 3-13) displays the provider list (Figure 3-14) for this entry.

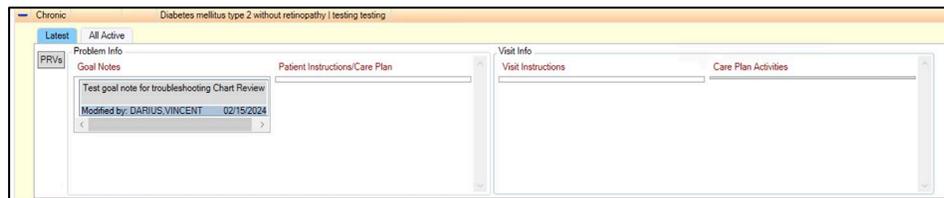


Figure 3-13: PRVs button

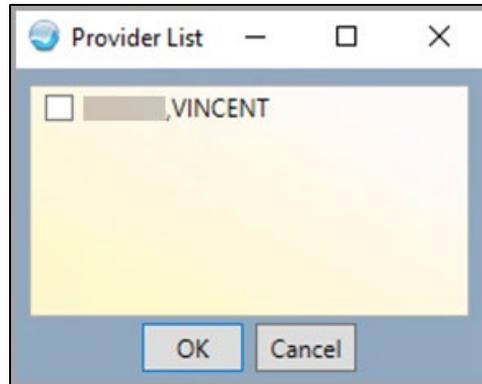


Figure 3-14: Provider List dialog

- **Status Column:** Contains one of the following statuses, as selected by the user.
  - **Chronic**
  - **Sub-acute**
  - **Episodic**
  - **Social/Env**
  - **Inactive**
  - **Personal**
  - **Routine/Administrative**
- **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 any 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 this problem has been used for this patient.
- **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.

### 3.1.5 Problem Details Window

You can double-click anywhere in the **IPL** window to open the **Problem Details** dialog for the selected problem (Figure 3-15). This dialog is informational only and provides problem data.



Figure 3-15: Problem Details window

## 3.2 Tabs

Tabs display based on the status of the patient's existing problems (Figure 3-16). 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.

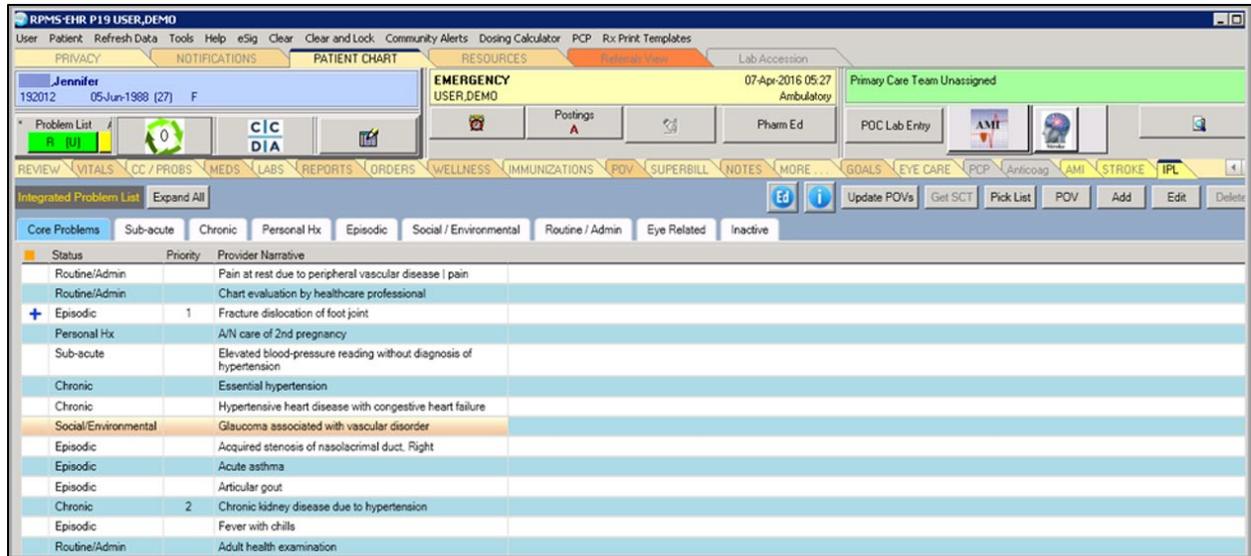


Figure 3-16: Complete List of IPL Tabs

### 3.2.1.1 Core Tab

User has the ability to customize the **Core** tab by selecting what status they want to see. Right-click the **Core** tab to view the **Customization** menu (Figure 3-17). For the **EYE DX** to display on a separate tab, the site CAC must enable this parameter: **BGO IPL EYE DX**.

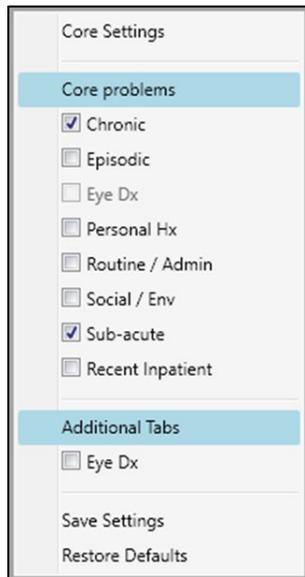


Figure 3-17: Core Settings List dialog

### 3.2.1.2 Column Setting Box

Right-clicking the **orange box** on the **Core Problems** tab (Figure 3-18) displays the **Orange Box Column Settings** dialog (Figure 3-19).

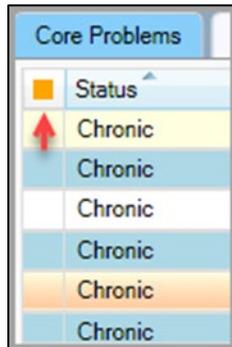


Figure 3-18: Core Problems tab Orange Box dialog



Figure 3-19: Orange Box Column Settings dialog

The **Column Settings** dialog 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.

## 3.3 Using the Get SCT Button

**Important:** The **Get SCT** button is no longer maintained.

These instructions are for the **Get SCT** button on the main window to update a historical ICD 9 entry that does not have a SNOMED term. For most patients this will NOT apply and this section will not be used. The **Get SCT** button only becomes active when an entry in the problem list has an asterisk.

**Note:** A visit must be selected.

**Note:** Problems that do not contain a **SNOMED CT** term are shown preceded by an asterisk (\*).

Status	Onset Date	Provider Narrative	Comments	PHx	PIP	IP	POV	ICD
+ Chronic		*Mild Or Unspecified Pre-eclampsia, Antepartum						642.43
+ Chronic		*Routine Postpartum Follow-up						V24.2
Chronic		*Pain In Joint Involving Ankle And Foot						719.47 ✓
+ Chronic		*Diabetes With Ketoacidosis, Type I [juvenile Type], Not Stated As Uncontrolled						250.11 ✓
+ Chronic		*Hypertensive Heart And Chronic Kidney Disease, Malignant, Without Heart Failure						404.00
+ Episodic	05/26/2013	Depressive disorder   pregnancy related						311.

Figure 3-20: Problem List with Get SCT Button Active dialog

**Note:** Figure 3-20 is an old screenshot used to show entries that are not SNOMED coded showing the asterisk in the **Provider Narrative** column.

In the **ICD 9 to SNOMED CT Lookup** dialog (Figure 3-21), the **ICD9** code for the problem shows in the **ICD 9 Value** field with the related **SNOMED** concepts listed below.

1. Click the **Expand** button () next to the problem name to expand the section and view the list of synonyms associated with that problem.
2. Click the **Collapse** button () to compress the list.

If needed:

- a. Type a new **ICD** number in the **ICD 9 Value** field.
- b. In **Subset**, select one or multiple **subset lists** to search.
- c. In **Search Date**, leave the current date default, or click the drop-down arrow to open a calendar where you can select a new date.
- d. Click **Find**. The **SNOMED Concept** list refreshes with your findings.

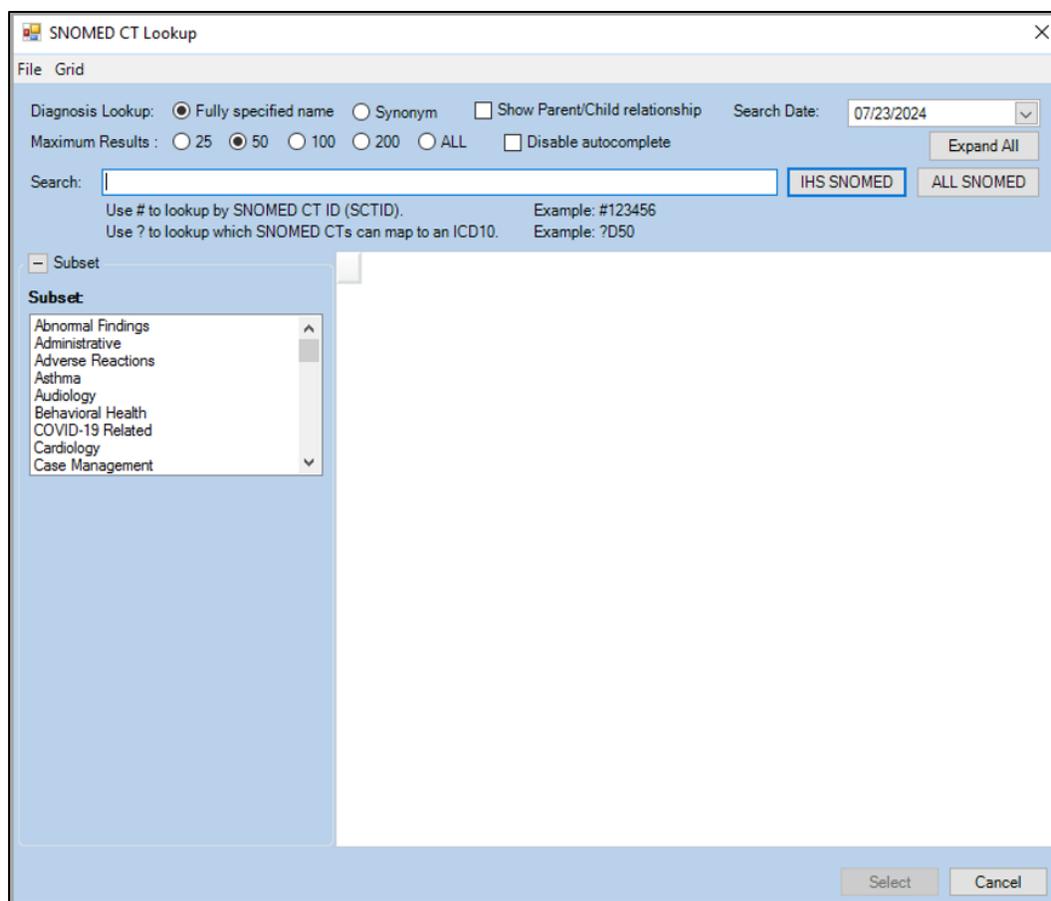


Figure 3-21: ICD 9 to SNOMED CT Lookup dialog

3. Select the **SNOMED CT** line item you want to use, then click **Select**. The problem updates with the asterisk (\*) removed from the problem list, the **ICD** code in the **ICD** column updates with your selection, and the **Get SCT** button is no longer active for this problem.

### 3.4 Using the POV Button

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

**Note:** An unlocked visit must be selected.

From the main window, select one or more **problem-line items**, then click the **POV** button. The **POV** dialog (Figure 3-22) opens, which shows the selected problems.

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

**Note:** 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**).

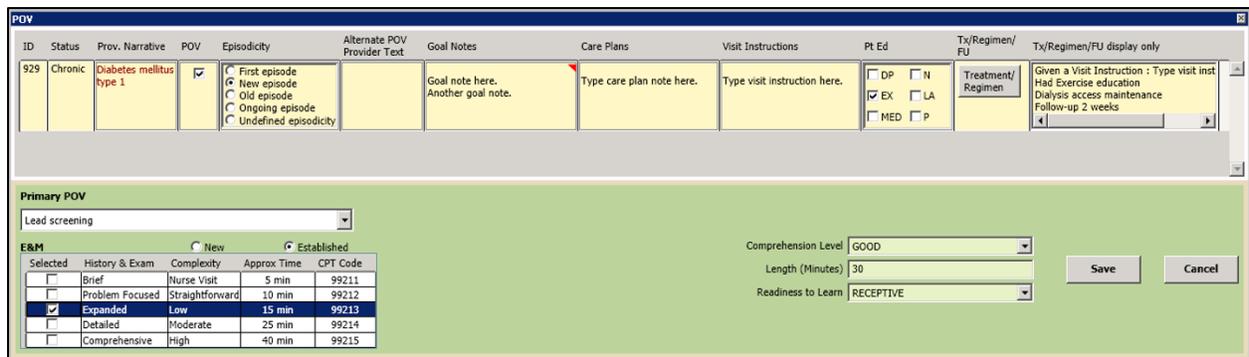


Figure 3-22: POV dialog

### 3.4.1 POV Dialog Columns Right-Click Menu

The following columns on the POV dialog have a right-click menu:

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

1. Right-click in a column to view the right-click menu (Figure 3-23) with 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.

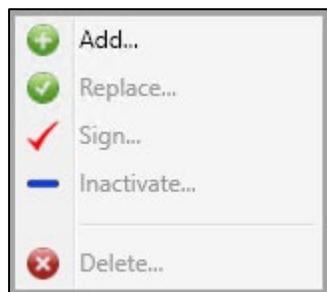


Figure 3-23: POV Right-Click Menu

- **Add:** The **Add** dialog (Figure 3-24) opens for the column selected. Type the appropriate text and click **OK**. The text shows in the column.

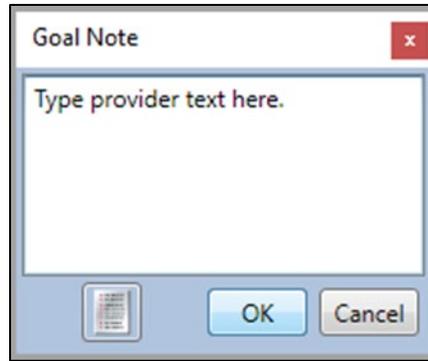


Figure 3-24: Add dialog

- **Replace:** The **Replace** function is used to edit existing text. The **Replace** dialog (Figure 3-25) shows the original text opens.

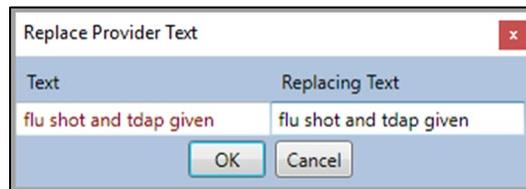


Figure 3-25: Replace dialog

2. Select the **text** to make it editable and surrounded by a box.
  3. Type the **replacement text** in the **Replacing Text** field and click **OK**. The edited text displays.
- **Sign:** The **Review/Sign** dialog (Figure 3-26) opens with a list of the items you added for you to sign. Type your **electronic signature**, and then click **OK**.

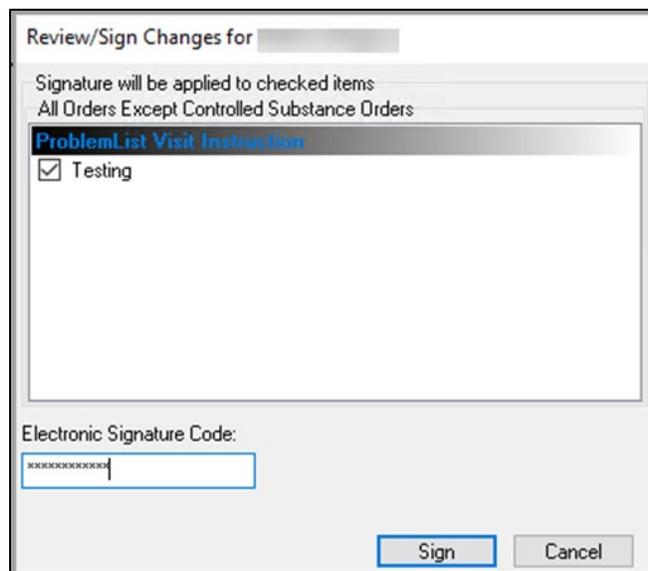


Figure 3-26: Review/Sign Changes dialog

- **Inactivate:** This functionality is intended to inactivate the existing goal or care plan and initiate a new one (Figure 3-27). 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.
4. Type a **comment**, and then click **Yes**.

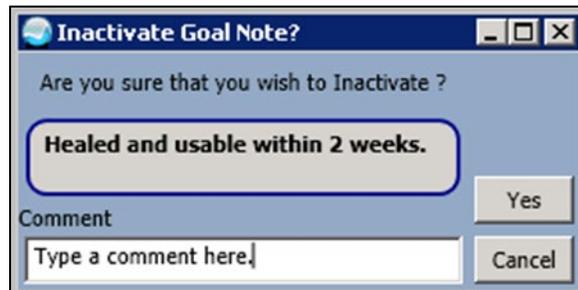


Figure 3-27: Inactivate Item dialog

- **Delete:** The **Delete Confirm** dialog (Figure 3-28 and Figure 3-29) for the column you are in opens to confirm your deletion. A different dialog displays depending on whether the entry has been signed or not.

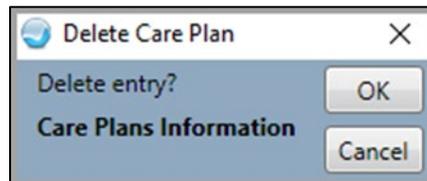


Figure 3-28: Delete Confirm dialog for Unsigned Entry

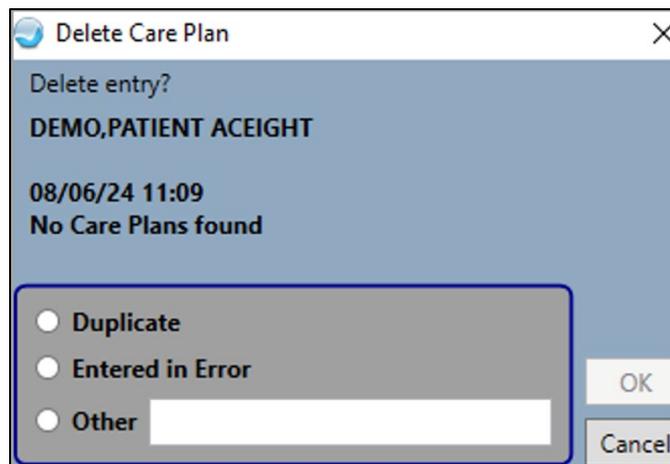


Figure 3-29: Delete Confirm Dialog for Signed Entry

## 3.4.2 POV Dialog Columns and Fields

### 3.4.2.1 ID Column

The **ID** column shows a system-generated ID.

### 3.4.2.2 Status Column

The **Status** column shows the selected status for the problem.

### 3.4.2.3 Prov. (Provider) Narrative Column

The **Prov. (Provider) Narrative** column contains **SNOMED** concept description and provider text.

### 3.4.2.4 POV or INPT Column

The next column either shows a **POV** or **INPT** column with a 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.

### 3.4.2.5 Episodicity Column

The **Episodicity** column contains the following option buttons. Select or clear them as applicable:

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

### 3.4.2.6 Alternate POV Provider Text Column

Add any free-text information in the **Alternate POV Provider Text** field by selecting **Add** from the right-click menu. The **Provider Text** dialog (Figure 3-30) opens:

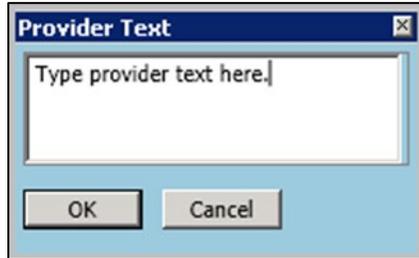


Figure 3-30: Provider Text dialog

1. Type the **provider text** to include more detail regarding the problem for **TODAYS ENCOUNTER** only. So, the provider text here is stored only to the **Provider Text** for the **Visit Diagnosis** provider narrative.
2. Click **OK**.
3. If any provider text already exists, click **Replace...** (it will be active) in the right-click menu. The **Provider Text** dialog with the existing text and replacing text fields opens. Refer to Section 3.4.1 for additional information.
4. Type the new **provider text** in the **Replacing Text** field.
5. Click **OK**. Your change displays in the **Prov. Text** column.

### 3.4.2.7 Goal Notes Column

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 (Figure 3-31) opens.

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

Templates must first be created on the **Notes** tab. These can be folders or individual templates. For the templates to display when the **TREG Template** button is selected, the templates must first be added by the site CAC using the **BGO IPL GOAL TEMPLATE** parameter

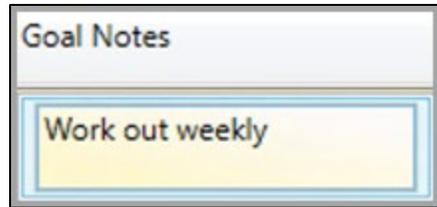


Figure 3-31: Highlighted Goal Note Ready to Replace or Delete

- You can also type over an existing **Goal Note** by clicking in (or selecting) the **text** and making your changes.

### 3.4.2.8 Care Plans Column

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 opens.

Click the **Template** button () to select a template, if needed. Templates must first be created on the **Notes** tab. These can be folders or individual templates. For the templates to display when the **TREG Template** button is selected, the templates must first be added by the site CAC using the **BGO IPL CARE TEMPLATE** parameter.

- You can also type over an existing **Care Plan** by clicking in (or selecting) the **text** and making your changes.

### 3.4.2.9 Visit Instructions Column

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 opens.

Click the **Template** button () to select a template, if needed. Templates must first be created on the **Notes** tab. These can be folders or individual templates. For the templates to display when the **Template** button is selected, the templates must first be added by the site CAC using the **BGO IPL VISIT TEMPLATE** parameter.

- You can also type over an existing **Visit Instruction** by selecting the text and making any changes.

### 3.4.2.10 Pt Ed (Patient Education) Column

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)**

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

### 3.4.2.11 Tx/Regimen/FU Column

The **Tx/Regimen/FU** column contains the **Treatment/Regimen** button.

1. Click the **Treatment/Regimen** button () to open the **Treatment/Regimen** dialog (Figure 3-32)
2. Click the **Expand** button () next to the applicable list heading to view the options.



Figure 3-32: Treatment/Regimen dialog with Follow Up Expanded

3. Select one or more check boxes to indicate the **Treatment** or **Regimen** for the patient.
4. Click **OK**. The **Tx/Regimen/FU Display Only** column updates with your selection.

#### 3.4.2.12 Tx/Regimen/FU Display Only Column

The **Tx/Regimen/FU Display-Only** column shows the **Visit Instructions**, **Patient Education**, and **Tx/Regimen/FU** information. 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.

#### 3.4.2.13 Primary POV

1. Highlight the **POV** that you want to make the **Primary** from the IPL list.
2. Right click-and select **Edit** (Figure 3-33).

Figure 3-33: EDIT Problem dialog

3. Select the **Use as POV** checkbox (Figure 3-34).
4. Click **Use as Primary** that only displays when the problem is used as **POV**.

Figure 3-34: Select the Use as POV checkbox

The problem will now be saved as **Primary** in the **Visit Diagnosis** display (Figure 3-35).

Visit Diagnosis		Update POVs	
POV Provider Narrative	SNOMED CT	ICD	Priority
Diabetes mellitus type 1	Type 1 diabetes mellitus	E10.9	Primary
Asthma	Asthma	J45.909	Secondary
Allergy to animal dander	Allergy to animal dander	ZZZ.999	Secondary

Figure 3-35: Visit Diagnosis display

### 3.4.2.14 E&M (Evaluation and Management) Table

The **E&M (Evaluation and Management)** table (Figure 3-36) contains all CPT codes defined for the 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. The list changes the CPT code displayed depending on which option button is selected, **New** or **Established**.

E&M				
<input checked="" type="radio"/> New <input type="radio"/> Established				
Selected	History & Exam	Complexity	Approx Time	CPT Code
<input type="checkbox"/>	Problem Focused	Straightforward	10 min	99201
<input type="checkbox"/>	Expanded	Straightforward	20 min	99202
<input checked="" type="checkbox"/>	Detailed	Low	30 min	99203
<input type="checkbox"/>	Comprehensive	Moderate	45 min	99204
<input type="checkbox"/>	Comprehensive	High	60 min	99205

\* Required Field

Figure 3-36: E&M table

- 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 (Figure 3-37) opens. If needed, select the **Rollback** check box to indicate that a care planning instruction was created. Click **OK**.

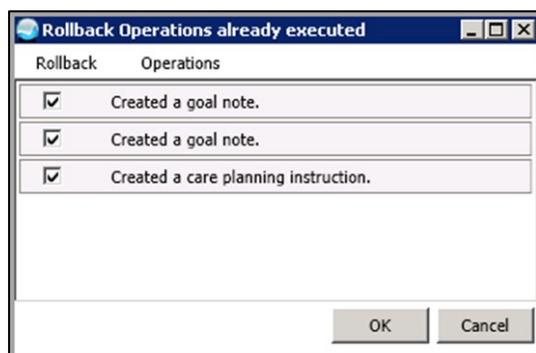


Figure 3-37: Rollback Operation Already Executed dialog

## 3.5 Using the PickList Button

These instructions are for the **PickList** button on the main window to update a **PickList**. Refer to Section 3.8.1 or Section 3.8.2 information on using the **PickList** button from the **Add Problem** or **Edit Problem** dialogs.

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

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

**Note:** The **PickList** button is enabled, and picklists can be managed if no visit is selected.

### 3.5.1 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 window or from the **Add Problem** or **Edit Problem** dialogs. The **PickList Selection** dialog (Figure 3-38) opens.

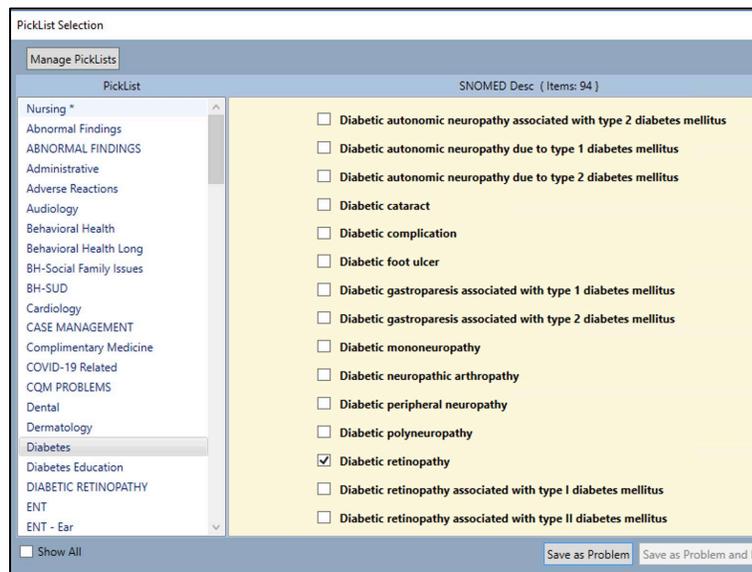


Figure 3-38: PickList Selection dialog

#### 3.5.1.1 In the PickList Column

1. Select a **PickList**.
2. Scroll **up** or **down** to view the entire list, if needed.
3. Select the **Show All** check box at the lower left 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.
- The following message (Figure 3-39) appears when the cursor is rested on picklists with **light blue shading**.

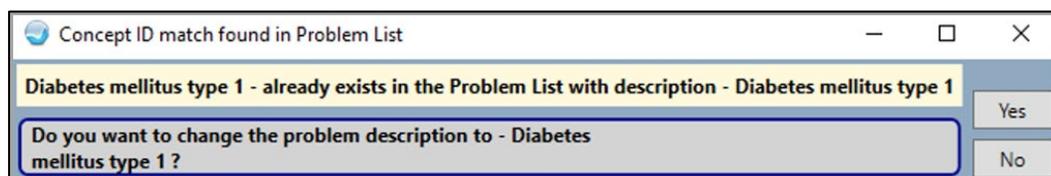


Figure 3-39: Concept ID Match Found in Problem List dialog

- Picklists with **white shading** indicate new problems for the patient and are saved as such.

### 3.5.1.2 In the SNOMED Desc Column

- The **SNOMED 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.
- 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 indicates the number of **SNOMED CT** descriptions associated with the selected picklist.

- 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 opens. See Section 3.4 for details on completing this dialog.

### 3.5.2 Managing PickLists

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

**Important:** 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 (Figure 3-40) opens.

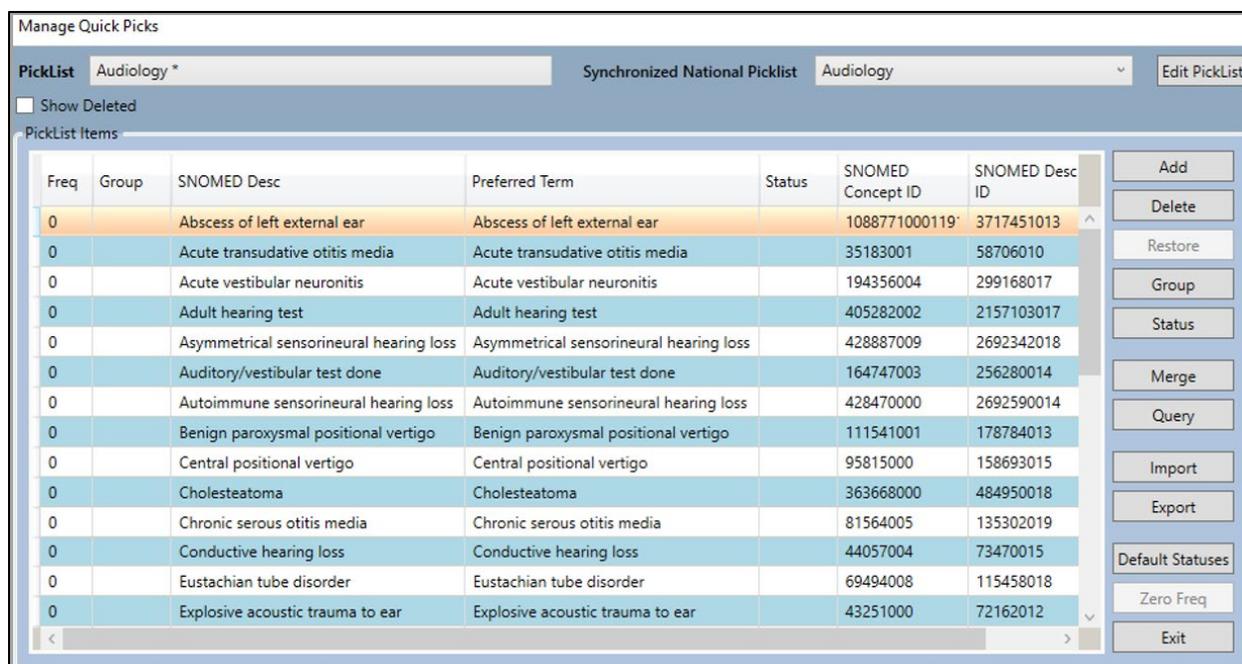


Figure 3-40: Manage Quick Picks dialog

2. From the **PickList** drop-down menu, select a **picklist** to manage. The **PickList Items** list refreshes showing 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.
4. Click any of the following **buttons** to perform the necessary actions.

### 3.5.2.1 Synchronize

1. From the **PickList** drop-down menu (Figure 3-41), select a **picklist** to manage. The **PickList Items** list refreshes showing the problems associated with that picklist.



Figure 3-41: Synchronize Quick Picks Problems dialog

2. From the drop-down menu **Synchronized National PickList** (Figure 3-42), select a **DTS PICK Subset** to link with the **Local PickList**.

The system displays the message dialog **Change Linked National PickList**.

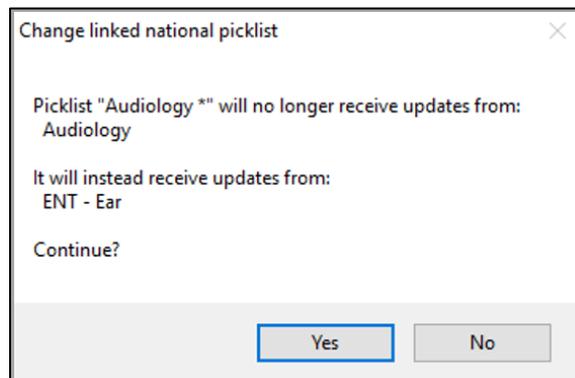


Figure 3-42: Change Linked National PickList dialog

- Click **No** to close the dialog and change the existing linked **DTS Subset**.
- Click **Yes** to update the **Local PickList** to sync and link with the new **DTS Subset**.

### 3.5.2.2 Add

1. Click the **Add** button from the **Manage Quick Picks** dialog. The **SNOMED CT Lookup** dialog (Figure 3-43) opens.

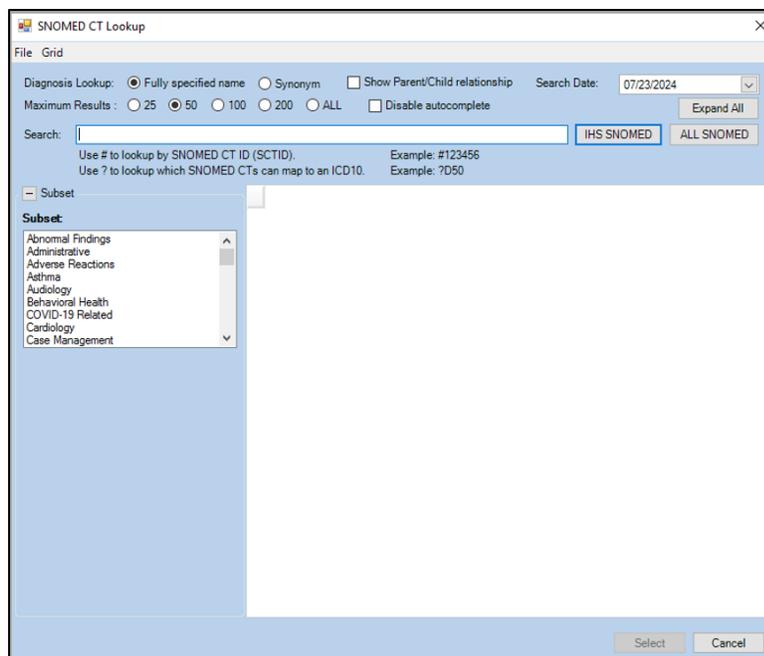


Figure 3-43: SNOMED CT Lookup dialog

2. 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.
3. In **Maximum Results**, click one of the following option buttons to limit the number of results (or click **ALL**):
  - 25
  - 50
  - 100
  - 200
  - ALL
4. In **Search**, type the term by which you want to search.
5. In **Subset**, you can select a subset in which to search, if needed.
6. 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.
7. Click either the **IHS SNOMED** or **ALL SNOMED** button. The list of **SNOMED CT** terms is populated.

8. Select a **problem** from the list and then click **Select**. Your selection appears in the **PickList Items** of the **Manage Quick Picks** dialog (Figure 3-44).
  - 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.

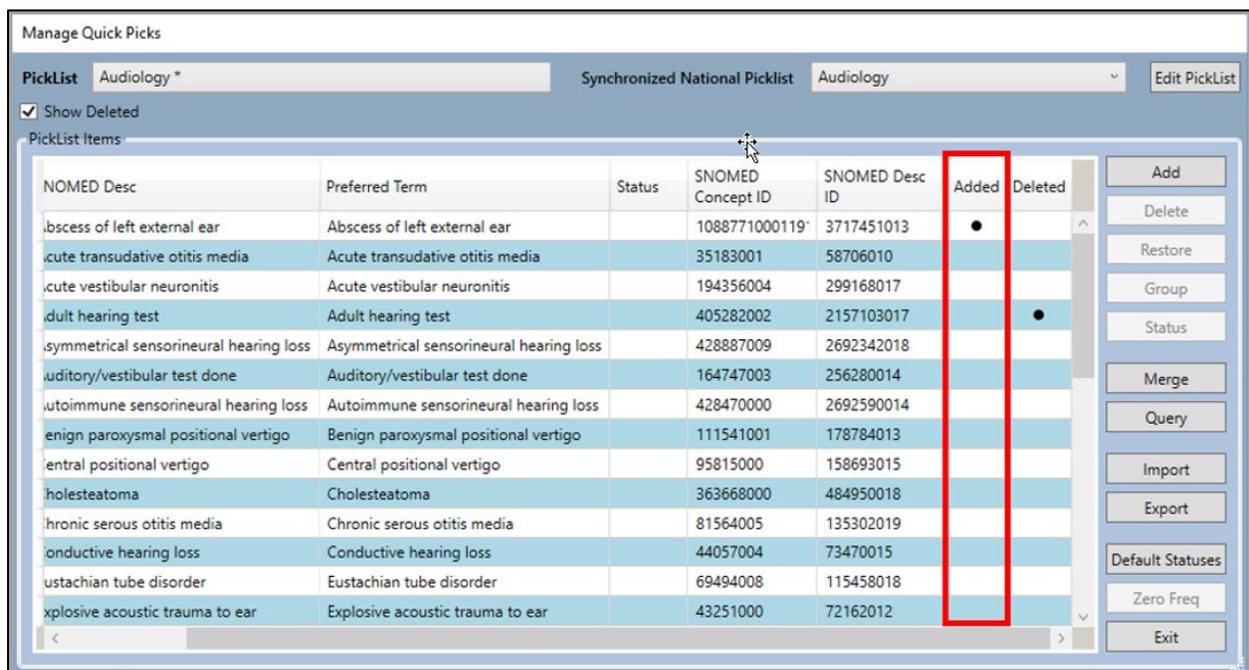


Figure 3-44: Locally Added SNOMED CT Not Found in DTS PICK Subset

9. The locally added **SNOMED CT** code will display in the table with the **Local PickList** values.
10. Scroll to the right using the horizontal scrollbar to view the column **Added** showing that the newly entered **SNOMED CT** has been added.

The system displays a mouse-over tip on the column heading that states:

“A dot in this column indicates that the code is present in the **Local PickList** but is not present in the synchronized National PickList.”

### 3.5.2.3 Delete

1. When clicking the **Delete** button from the **Manage Quick Picks** dialog for a locally added **SNOMED CT** code. The **Delete Items** confirmation message (Figure 3-45) appears.

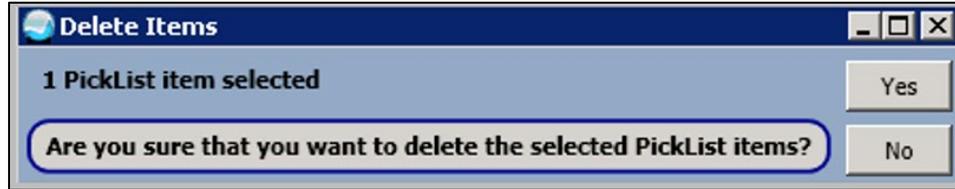


Figure 3-45: Delete PickList Item confirmation message

- The **SNOMED CT** will be deleted and is removed from the **Local PickList** and display.
2. When clicking the **Delete** button from the **Manage Quick Picks** dialog for a **DTS PickList Subset SNOMED CT** code (Figure 3-46), the **Delete Items** confirmation message appears.
    - The **SNOMED CT** will be deleted and is removed from the **Local PickList** and display.
    - If the user selects the check box **Show Deleted** the **SNOMED CT** appears back in the table.
  3. Scroll to the right using the horizontal scrollbar to view the column **Deleted** showing the newly entered **SNOMED CT** has been added.



Figure 3-46: Displaying of DTS PICK Subset deleted SNOMED CT

- The system will display a mouse-over tip on the column heading **Deleted** that states:  
 “A dot in this column indicates that the code is present synchronized **National PickList** but has been removed from the **Local PickList**.”

### 3.5.2.4 Restore

1. Select the check box **Show Deleted** the **SNOMED CT**.
2. Select a **row** from the table with a dot in the **Deleted** column. The **Restore** button is enabled (Figure 3-47).

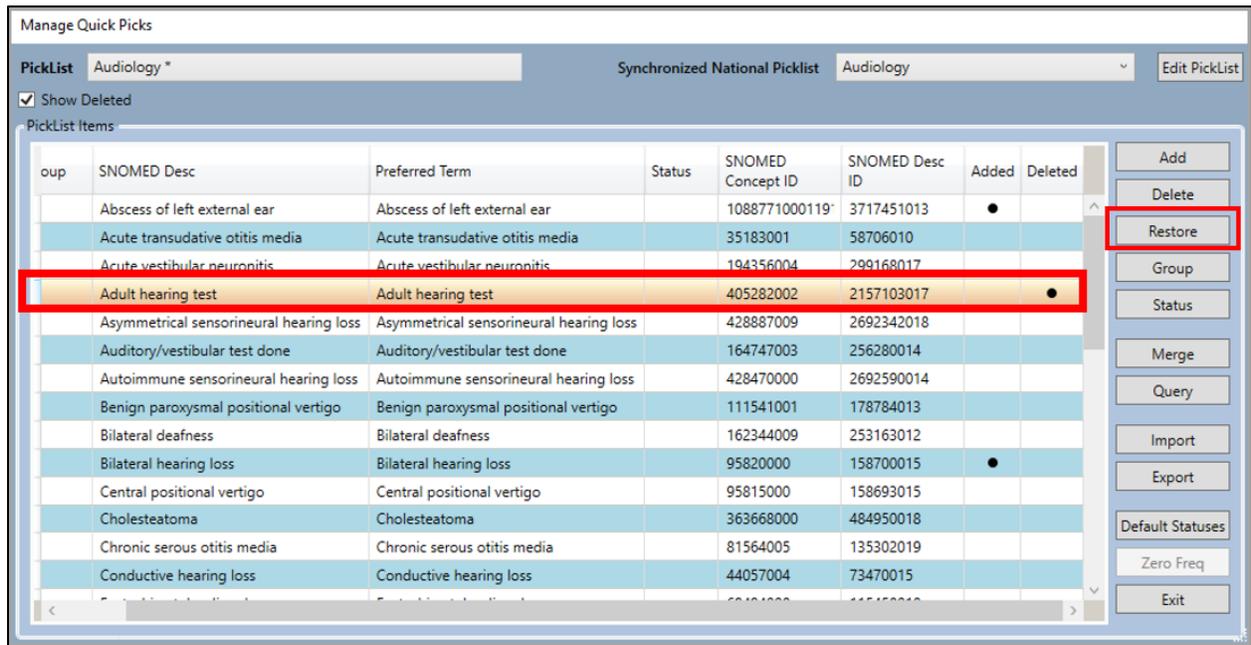


Figure 3-47: Selected and Restored SNOMED CT from DTS Subset

3. Click the **Restore** button.
  - The **SNOMED CT** is visible in the **Local PickList** table without a dot in the deleted column, the code has been restored into the **Local PickList** (Figure 3-48).

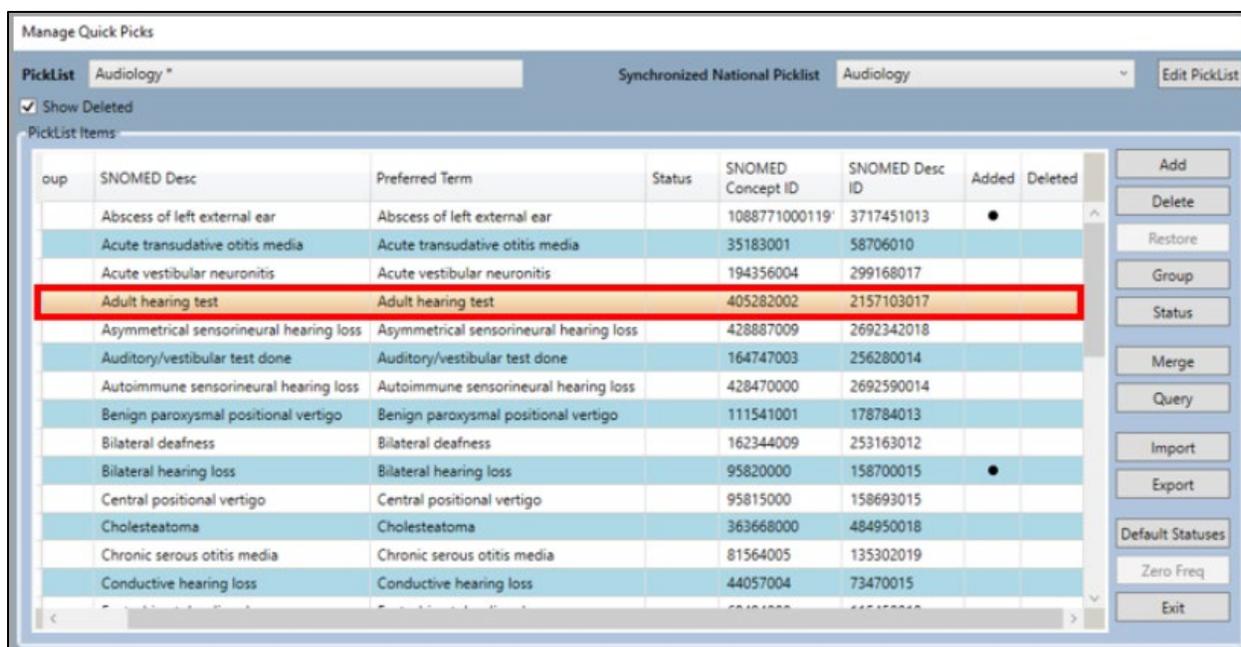


Figure 3-48: DTS Subset SNOMED CT Restore to Local PickList

### 3.5.2.5 Changing Group

1. Click the **Group** button from the **Manage Quick Picks** dialog. The **Change the Group for 3 (or number selected) PickList Item(s)** dialog (Figure 3-49) opens.

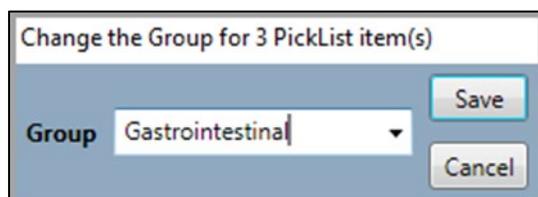


Figure 3-49: Change the Group dialog

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

### 3.5.2.6 Changing Status

1. Click the **Status** button from the **Manage Quick Picks** dialog. The **Change the Status for 1 (or number selected) PickList Item(s)** dialog (Figure 3-50) opens.

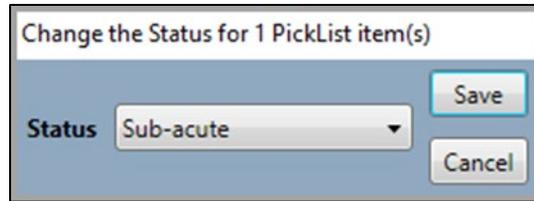


Figure 3-50: Change the Status dialog

- In the **Status** drop-down (Figure 3-51), select a status to assign:

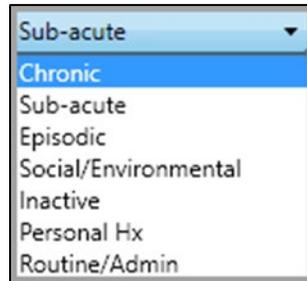


Figure 3-51: Status Drop-Down list

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

### 3.5.2.7 Merging

- Click the **Merge** button from the **Manage Quick Picks** dialog. The **Merge PickList** dialog (Figure 3-52) opens.



Figure 3-52: Merge PickList dialog

2. In **From**, select the picklist to merge the item or items from.
3. In **To**, select the picklist to merge the item or items to.
4. Click **Merge**. The **Merged PickList** message (Figure 3-53) appears.

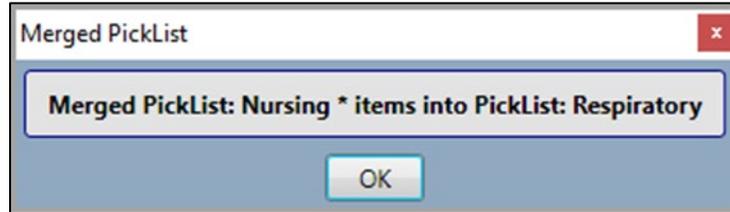


Figure 3-53: Merged PickList message dialog

### 3.5.2.8 Querying

1. Click the **Query** button from the **Manage Quick Picks** dialog. The **Query for PickList Items** dialog (Figure 3-54) opens.

Figure 3-54: Query for PickList Items dialog

2. In **Target PickList**, select a picklist to query from the drop-down menu.
3. In **From Date**, click the **Ellipsis** button () to select a date from the calendar.
4. 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.

5. In **Hosp. Location**, click the **Ellipsis** button () to select a location. The **Select a Location** dialog (Figure 3-55) opens.

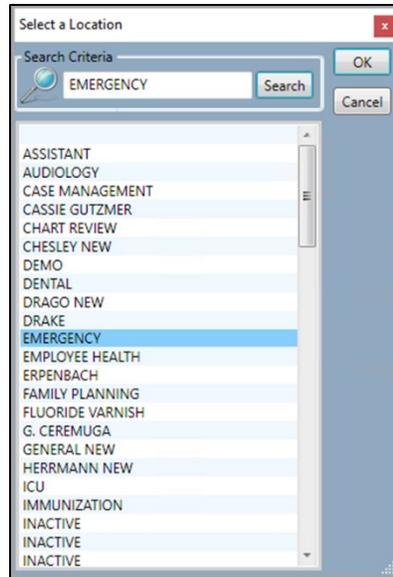


Figure 3-55: Select a Location dialog

6. In **Search Value** begin typing the first few letters of the location name. The list refreshes with your location.
7. Click to select the location, and then click **OK**. Your selection is populated in the **Hosp. Location** field.
8. In **Clinic**, click the **Ellipsis** button () to select a clinic. The **Select a Clinic** dialog (Figure 3-56) opens.

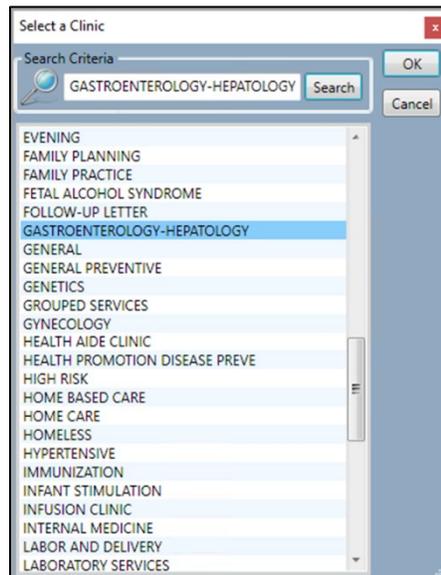


Figure 3-56: Select a Clinic dialog

9. In **Search Value**, begin typing the first few letters of the clinic name. The list refreshes with your clinic.
10. Click to select the **clinic**, and then click **OK**. Your selection is populated in the **Clinic** field.
11. In **Provider**, click the **Ellipsis** button (⋮) to select a provider. The **Select a Provider** dialog (Figure 3-57) opens.

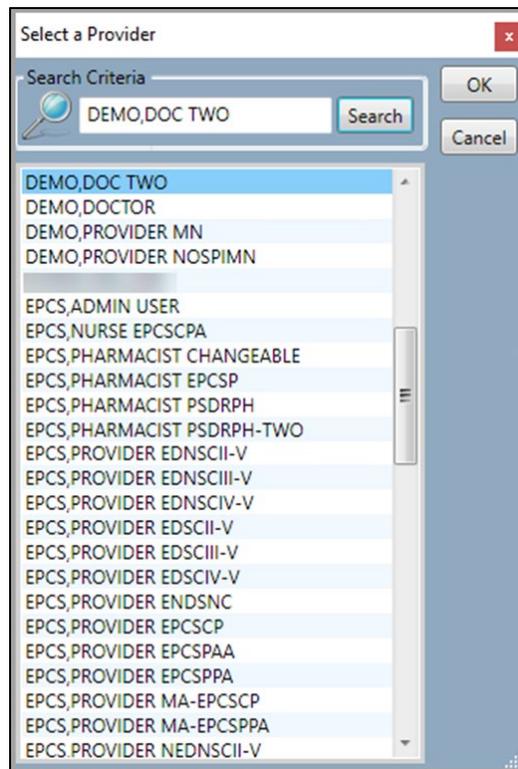


Figure 3-57: Select a Provider dialog

12. In **Search Value** begin typing the first few letters of the **provider name**. The list refreshes with providers.
13. Click to select the **provider**, and then click **OK**. Your selection is populated in the **Provider** field.
14. In **Prov. Class**, click the **Ellipsis** button (⋮) to select a provider class. The **Select a Provider Class** dialog (Figure 3-58) opens.

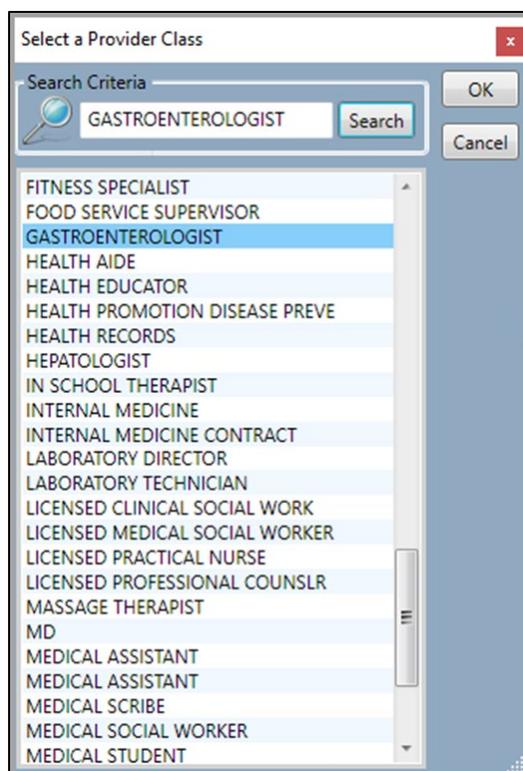


Figure 3-58: Select a Provider Class dialog

15. In **Search Value** begin typing the first few letters of the provider's class. The list refreshes with provider classes.
16. Click to select the **Provider Class**, and then click **OK**. Your selection is populated in the **Prov. Class** field.
17. In **Max hits**, **500** is the default. Type a **number of hits** to return (Figure 3-59) if you want to change the number of hits returned.

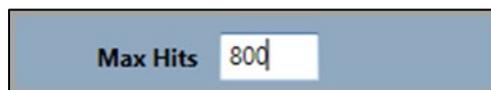


Figure 3-59: Max Hits field

18. Click **OK** on the **Query for PickList Items** dialog. An information message (Figure 3-60) appears, showing the number of returned records.

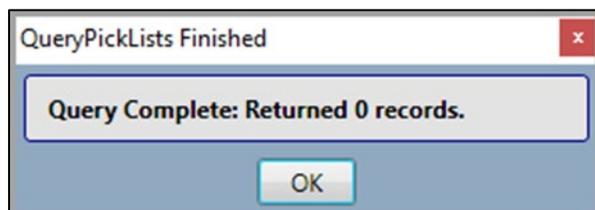


Figure 3-60: Query PickLists Finished information message

### 3.5.2.9 Importing

1. Click the **Import** button from the **Manage Quick Picks** dialog. The **Import SNOMED PickLists** dialog (Figure 3-61) opens.

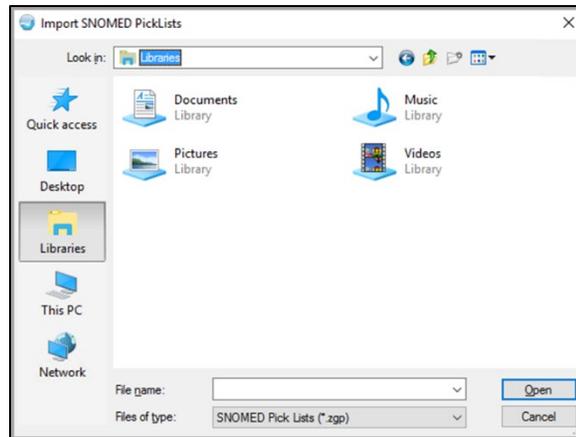


Figure 3-61: Import SNOMED PickLists dialog

2. In **Look in**, select a location from which to import.
3. Locate the **file** you want to import. The **Files of Type** list defaults to **SNOMED PickLists (\*.zgp)**.
4. Click **Open**. Your file is imported.

### 3.5.2.10 Exporting

1. Click the **Export** button from the **Manage Quick Picks** dialog. The **Save As** dialog (Figure 3-62) opens.

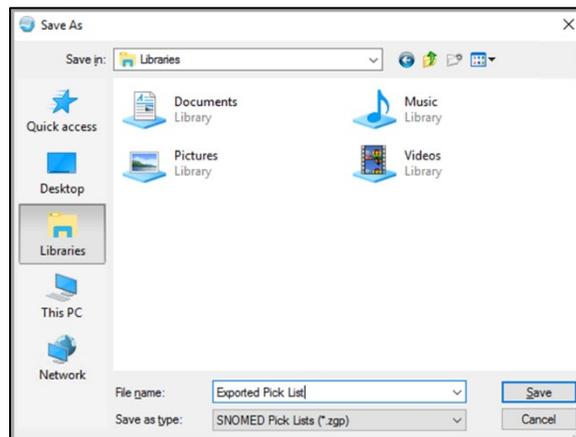


Figure 3-62: Save As (Export PickList) dialog

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

### 3.5.2.11 Default Statuses

1. Click the **Default Statuses** button from the **Manage Quick Picks** dialog (Figure 3-40). The **Default the status of all items** dialog appears (Figure 3-63).

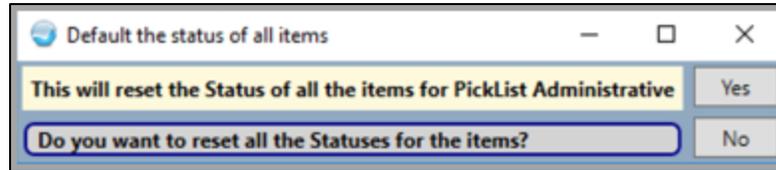


Figure 3-63: Default the status of all items dialog

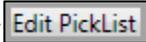
2. Click **Yes** to reset the status of all the items for the particular picklist. Click **No** to return to the **Manage Quick Picks** dialog (Figure 3-40).

### 3.5.2.12 Marking Zero Freq(ue)ncy

1. Click the **Zero Freq** button from the **Manage Quick Picks** dialog. A frequency of **zero (0)** is assigned to the picklist item.
2. Click **Exit** to close the **Manage Quick Picks** dialog (Figure 3-40).

## 3.5.3 Edit PickList Button

From the **Manage Quick Picks** dialog, 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 (Figure 3-64) opens.

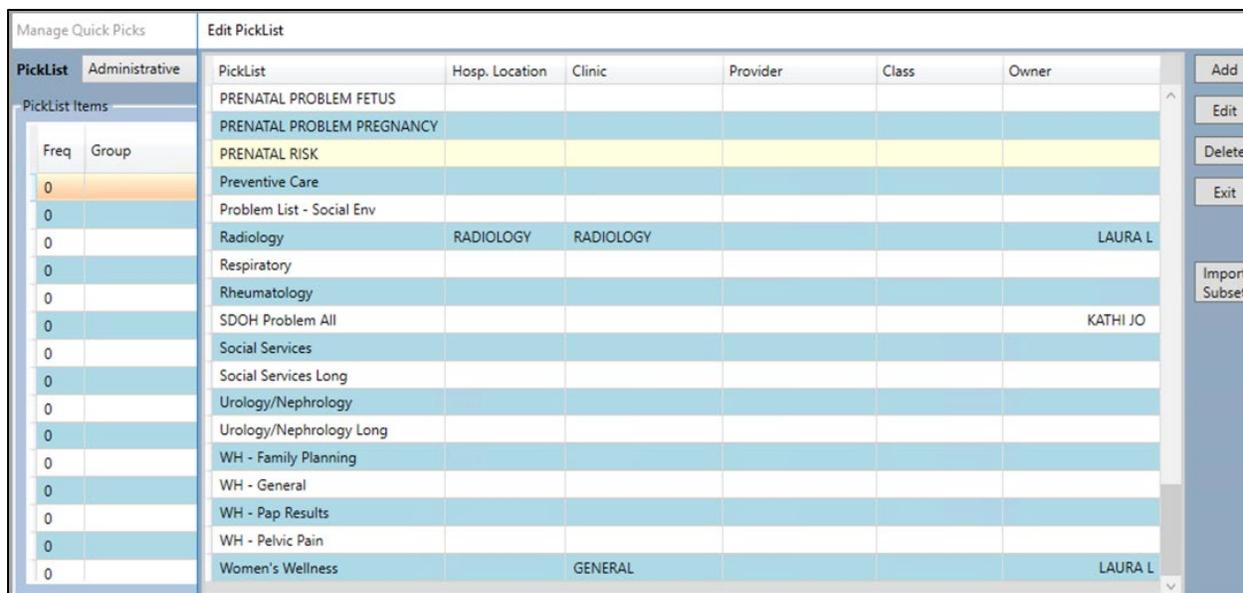


Figure 3-64: Edit PickList dialog

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

### 3.5.3.1 Add Button

1. Click **Add** from the **Manage PickLists** dialog. The **Add PickList** dialog (Figure 3-65) opens.

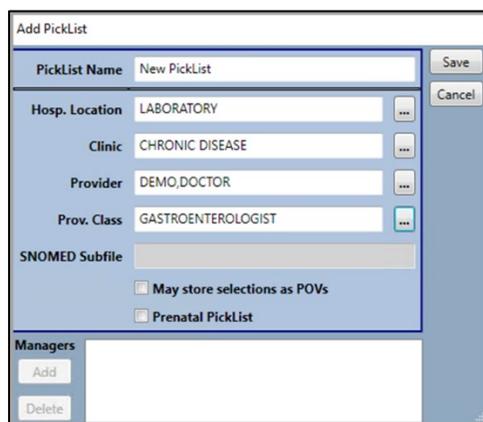


Figure 3-65: Add PickList dialog

2. In **PickList Name**, type a **name** for the picklist.
3. In **Hosp. Location**, click the **Ellipsis** button (⋮) to select a location. The **Select a Location** dialog (Figure 3-66) opens.

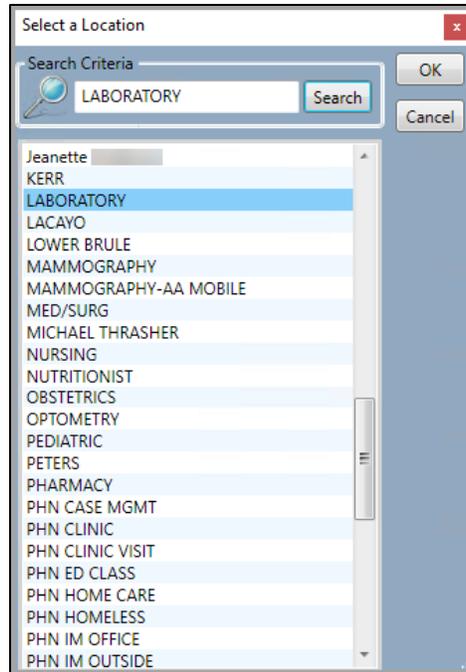


Figure 3-66: Select a Location dialog

4. In **Search Value**, begin typing the first few letters of the location name. The list refreshes with your location.
5. Click to select the **location**, then click **OK**. Your selection is populated in the **Hosp. Location** field.
6. In **Clinic**, click the **Ellipsis** button () to select a clinic. The **Lookup Clinic** dialog (Figure 3-67) opens.

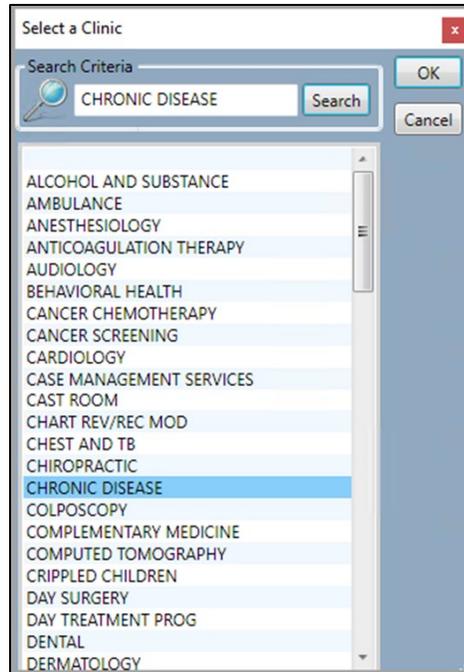


Figure 3-67: Lookup Clinic dialog

- a. In **Search Value**, begin typing the first few letters of the clinic name. The list refreshes with your clinic.
  - b. Click to select the **clinic**, and then click **OK**. Your selection is populated in the **Clinic** field.
7. In **Provider**, click the **Ellipsis** button () to select a provider. The **Lookup Provider** dialog (Figure 3-68) opens.

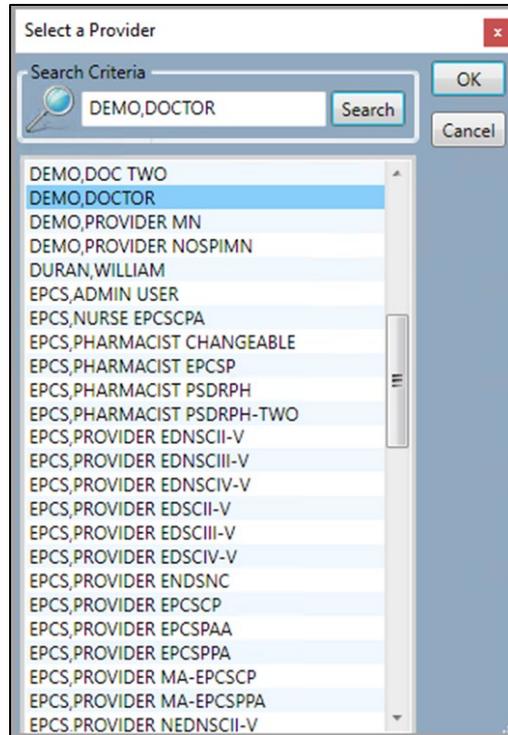


Figure 3-68: Lookup Provider dialog

- a. In **Search Value** begin typing the first few letters of the provider name. The list refreshes with providers.
  - b. Click to select the **provider**, and then click **OK**. Your selection is populated in the **Provider** field.
8. In **Prov. Class**, click the **Ellipsis** button () to select a provider class. The **Lookup Provider Class** dialog (Figure 3-69) opens.

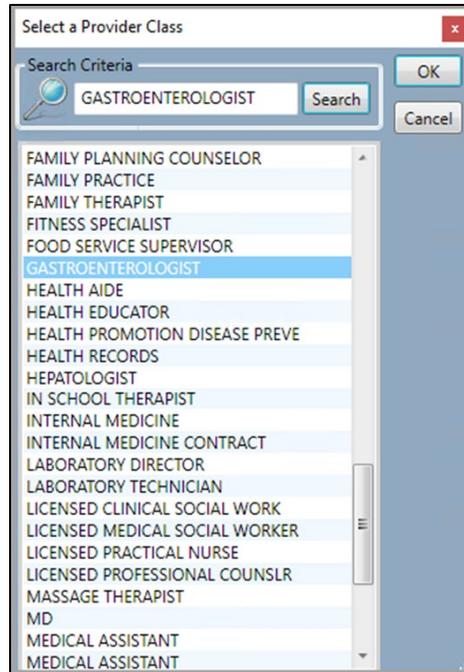


Figure 3-69: Lookup Provider Class dialog

- a. In **Search Value** begin typing the first few letters of the provider's class. The list refreshes with provider classes.
  - b. Click to select the **provider class**, and then click **OK**. Your selection is populated in the **Prov. Class** field.
9. The **SNOMED Subfile** field (Figure 3-70) is not editable, but shows the file that the list is based from. For example, if a subset was imported, that subset shows in the **SNOMED Subfile** field.



Figure 3-70: SNOMED Subfile field

The **Managers** section (Figure 3-71) is inactive until a picklist is created and edited. Refer to Section 3.5.3.2.

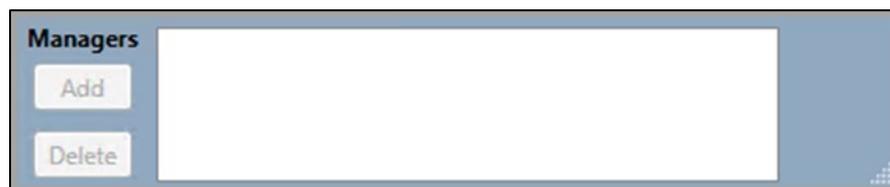


Figure 3-71: Managers Section dialog

- If applicable, select the **May store** selections as **POVs** check box. 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. See Section 3.5.1 above.
  - If applicable, select the **Prenatal PickList** check box.
10. Click **Save**. Your entries show in the **Manage PickLists** dialog.

### 3.5.3.2 Edit Button

1. Click to select a **picklist** to edit from the **Manage PickList** dialog. The **Edit PickList** dialog (Figure 3-72) opens.

Figure 3-72: Edit PickList dialog

2. Make any necessary changes to the **Edit PickList** dialog entries. Refer to Section 3.5.3.1 above for details on completing the fields.
3. If applicable, click the **Add** button in the **Managers** section to add a **PickList** manager. The **Select a Manager** dialog (Figure 3-73) opens.

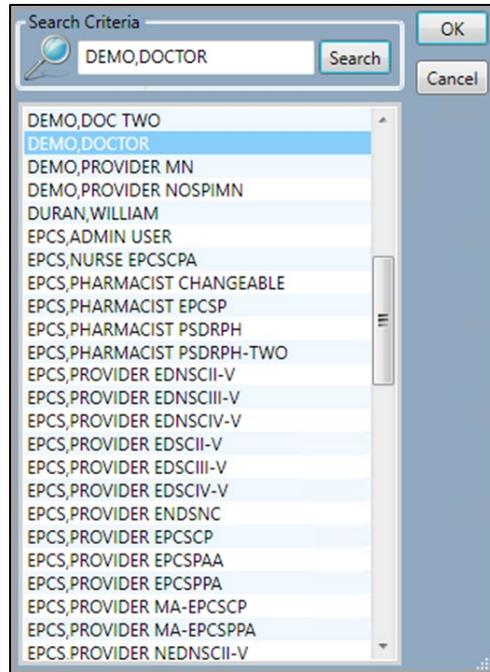


Figure 3-73: Select a Manager dialog

4. In **Search Criteria**, begin typing the first few letters of the person's name. The list refreshes with your selection.
5. Select the **name**, then click **OK**. The **Managers** field populates with your entry.
6. Click **Save** on the **Edit PickList** dialog.

### 3.5.3.3 Delete Button

1. Select a **picklist** to delete.
2. Click the **Delete** button. A **Delete PickList** information message (Figure 3-74) appears.

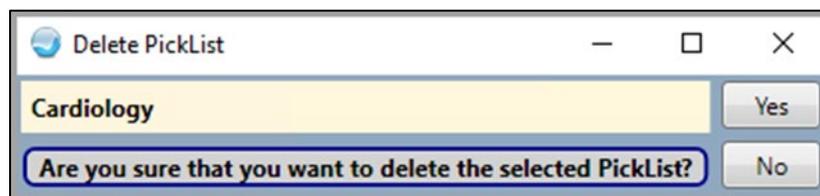


Figure 3-74: Delete PickList Information Message

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

### 3.5.3.3.1 *Import Subset Button*

1. Select a **picklist**, then click the **Import Subset** button. The **Import Subset** dialog (Figure 3-75) opens.



Figure 3-75: Import Subset dialog

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

## 3.5.4 Updating a PickList

There is an option available to authorized individuals to update all Pick Lists (Figure 3-76) with statuses defaulted for SNOMED terms DTS.



Figure 3-76: Updating a PickList Drop-Down List

## 3.6 Using the Education Information Button

The **Education Information** search enables you to look up information on a highlighted problem.

If an active visit is not selected when the **Education Information** button is clicked, the following message (Figure 3-77) appears.

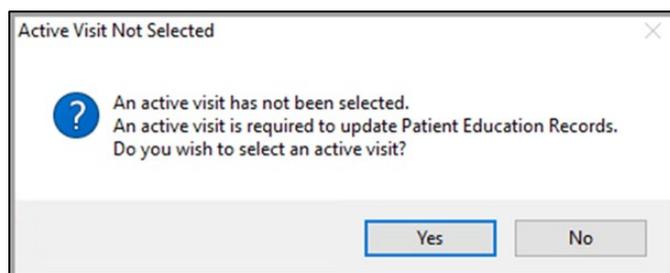


Figure 3-77: Active Visit Not Selected Information Message

- Click **Yes** to select an active visit.
- If **No** is clicked, **MedlinePlus** opens, but the **Add Patient Education Event** dialog does not open.

The search depends on whether any records are present or not.

- **Condition 1:** If there are records present, select one and click the **Education Information** button (  ) to go to the **MedlinePlus Reference** website (Figure 3-79) for the topic associated with the selected record.
- **Condition 2:** If there are no records present or no record is selected, click the **Education Information** button (  ) to display the **Web Reference Search** dialog (Figure 3-78).

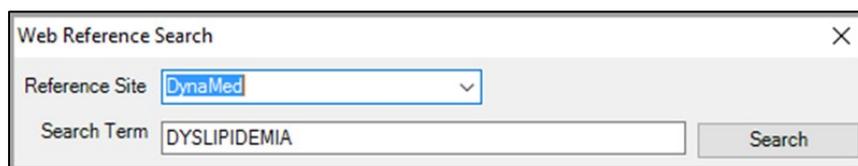


Figure 3-78: Web Reference Search dialog

Select a **Reference Site**, if needed. The default is the **ClinicalKey** site. After entering a term and clicking **Search**, you are taken to the selected website (example Figure 3-79) for the specified term.

**Note:** The **Add Patient Education Event** dialog also opens when the **Education Information** button is clicked. Patient education is tracked for Meaningful Use. Therefore, the **Add Patient Education Event** dialog should be completed.

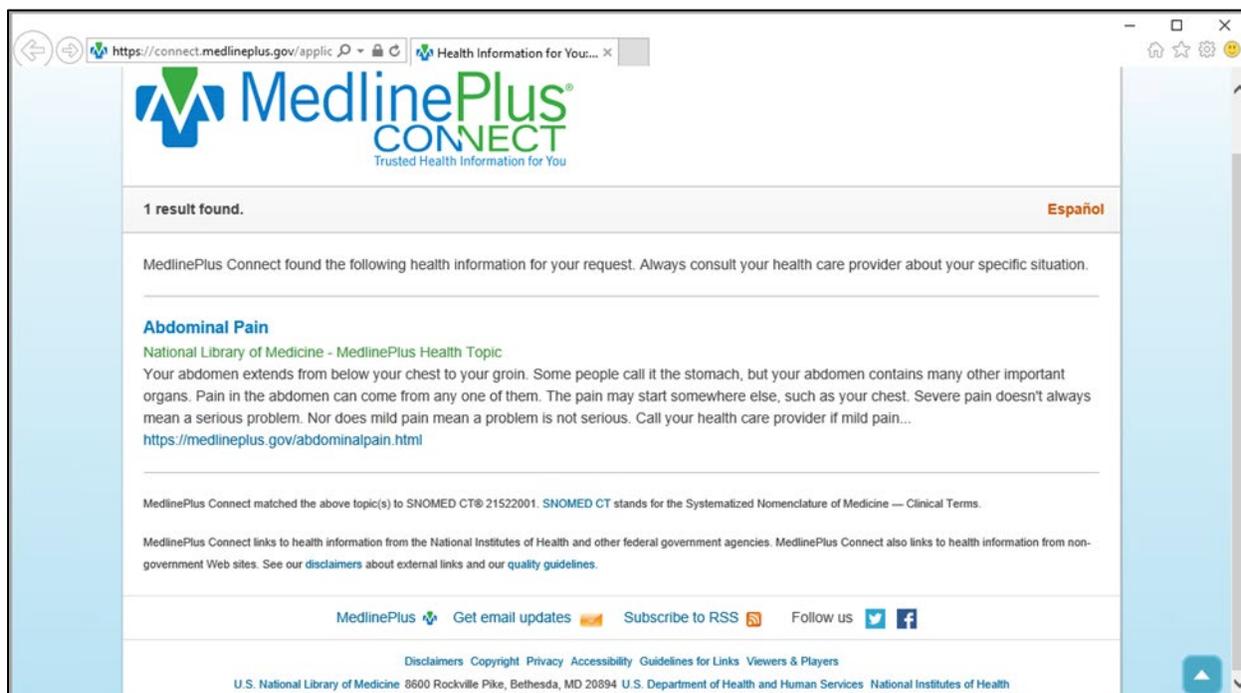


Figure 3-79: MedlinePlus website

### 3.7 Using the Clinical Decision Support Button

The **Clinical Decision Support** search depends on whether any records are present or not.

- **Condition 1:** If there are records present, select one and click the **Clinical Decision Support** button (  ). The **Web Reference Search** dialog (Figure 3-80) displays. The default is the **DynaMed** website (Figure 3-82) for the topic associated with the selected record.
- **Condition 2:** If there are no records present or no record is selected, click the **Clinical Decision Support** button (  ) to display the **Web Reference Search** dialog (Figure 3-80).

**Note:** You will also see this dialog if your site is not licensed for **DynaMed**.

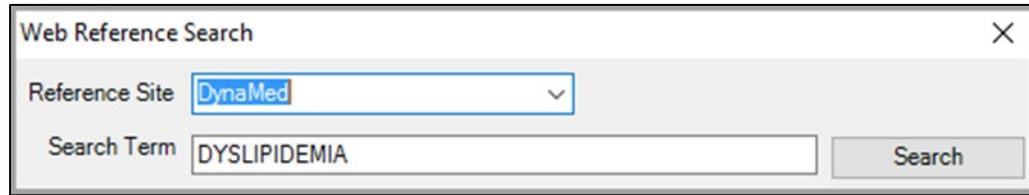


Figure 3-80: Web Reference Search dialog

There is a drop-down list (Figure 3-81) to select a different Reference Site if needed. The default is the **DynaMed** website (Figure 3-82).

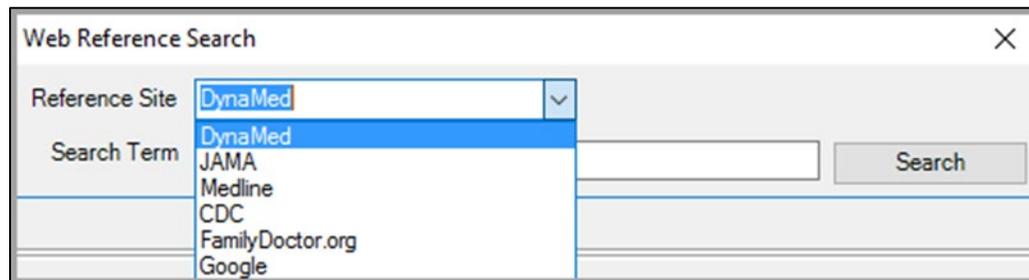


Figure 3-81: Reference Site drop-down list

After entering a term and clicking **Search**, you are taken to the selected website (Figure 3-82) for the specified term.

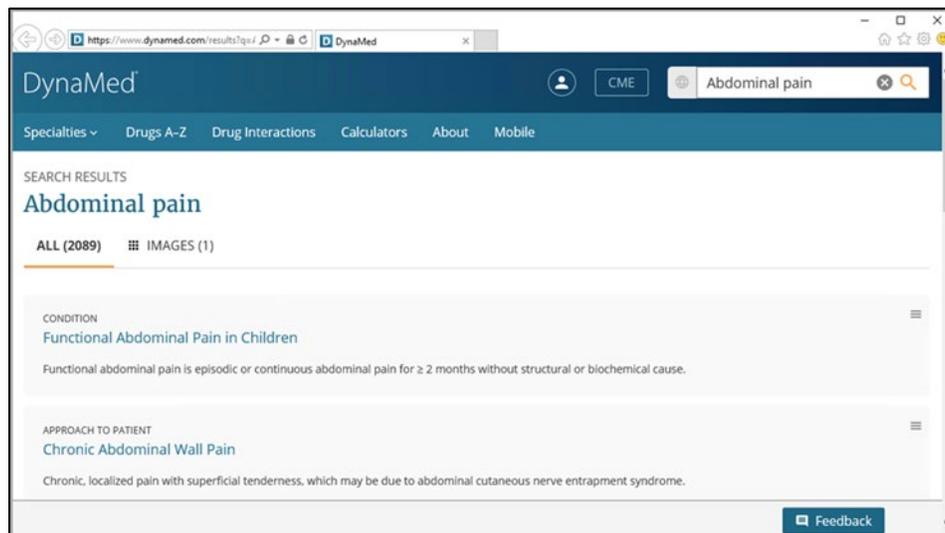


Figure 3-82: DynaMed website example

You can change to another website by selecting from the **Reference Site** drop-down list (Figure 3-81). The drop-down list for the **Reference Site** field on the **Web Reference Search** dialog can be configured.

## 3.8 Completing IPL Tasks

Tasks can be completed in the **Integrated Problem List** module by clicking the **Add**, **Edit**, or **Delete** buttons from the main window.

### 3.8.1 Adding a Problem

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

1. On the main **IPL** window, click the **Add** button. The **Add Problem** dialog (Figure 3-83) opens.

Figure 3-83: Initial Add Problem dialog

**Note:** A visit is not required to view the IPL details. However, a visit must be selected to enable the **Add** button.

**Note:** 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.

### 3.8.1.1 SNOMED CT Field

1. Type a term in the **SNOMED CT** field, and then press Enter or click the **Ellipsis** button (⋮). The **SNOMED CT Lookup** dialog opens with your term populated in the **Search** field and a list of **IHS SNOMED** terms.
2. If you want to search all **SNOMED** terms, in the initial **Add Problem** dialog, leave the **SNOMED CT** field blank and click the **Ellipsis** button (⋮). The **SNOMED CT Lookup** dialog (Figure 3-84) opens.

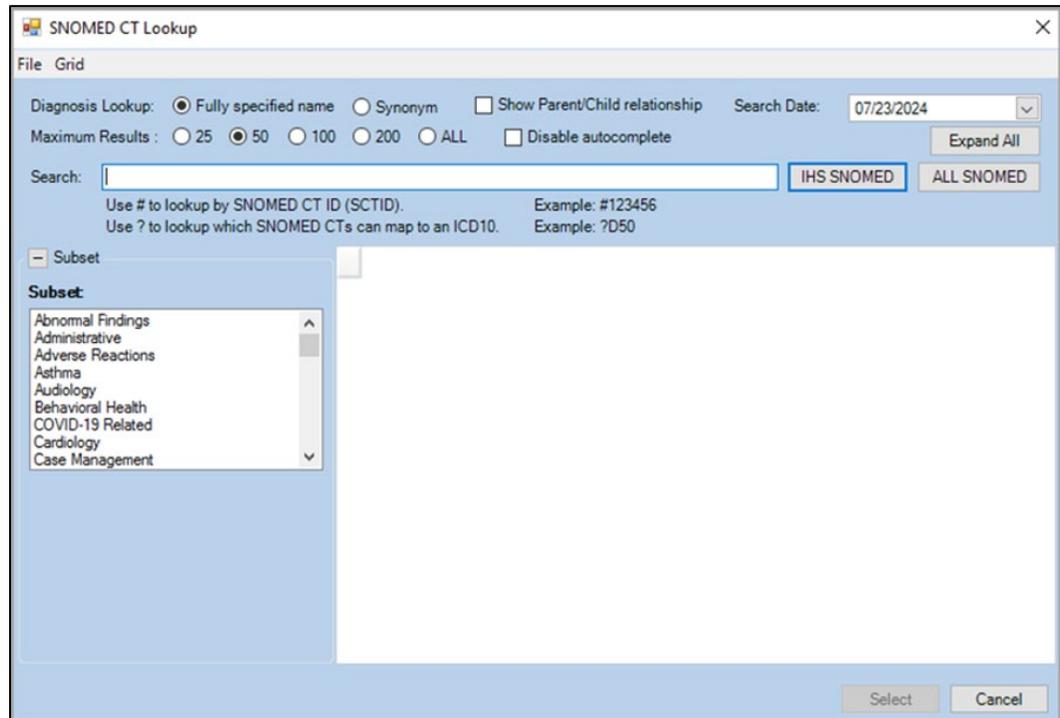


Figure 3-84: SNOMED CT Lookup dialog

3. In the **SNOMED CT Lookup** dialog, 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.
  - **Show Parent/Child Relationships** displays detail of value to coders.
  - **Disable Autocomplete** disables autocompletion of entries.
4. In **Maximum Results**, click one of the following option buttons to limit the number of results (or click **ALL**):
  - 25

- 50
  - 100
  - 200
  - ALL
5. In **Search**, type the term to search for.
  6. In **Subset**, you can select a subset to search for, if needed.
  7. 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.
  8. Click either the **IHS SNOMED** or **ALL SNOMED** button. The list of **SNOMED CT** terms is populated.
  9. Select and highlight a term, and then click the **Select** button. The **SNOMED CT** field of the **Add Problem** dialog refreshes with the **SNOMED CT** term you selected.

If you attempt to assign the same **SNOMED CT** code as an existing problem, the **Duplicate SNOMED CT Code** error message (Figure 3-85) displays.

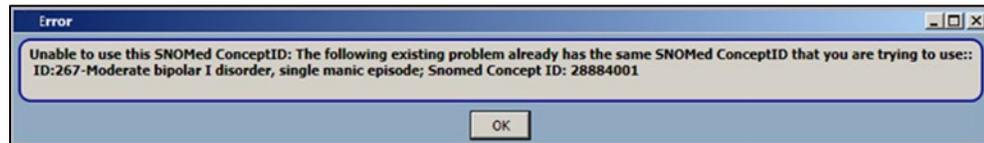


Figure 3-85: Duplicate SNOMED CT Code error message

10. Click **OK** and select a different **SNOMED CT** code from the **SNOMED CT Lookup** dialog.

### 3.8.1.2 Get SCT Button

Click the **Get SCT** button to open the **ICD 9 to SNOMED CT Lookup** dialog.

### 3.8.1.3 Pick List Button

1. Click the **Pick List** button to open the **Pick List** dialog. Refer to Section 3.5 for details on completing this dialog.

After you populate the **SNOMED CT** code, the **Add Problem** dialog (Figure 3-86) expands with additional fields.

Figure 3-86: Expanded Add Problem dialog with Asthma

2. In **Priority**, use the **Up** and **Down** arrows to select a priority level.
  - For pregnant patients, the **Pregnancy Related** check box is auto-selected if a problem was created in the **Prenatal** component and saved as **POV**. A red check-mark appears in the **PIP** column of the **IPL** main window in these cases.
  - If primary problem, select the **Primary** check box.

**Note:** The **Primary** check box is only visible if the **POV** has been completed. Refer to Section 3.4 for details.

3. In **Status**, click the **Applicable** option button:
  - Chronic
  - Sub-acute
  - Episodic
  - Social/Environmental
  - Inactive
  - Personal Hx

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

4. 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.

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

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

6. Click the **Clinical Course Ellipsis** button () to populate the **Clinical Course** field. The **Select Clinical Courses** dialog (Figure 3-87) opens.

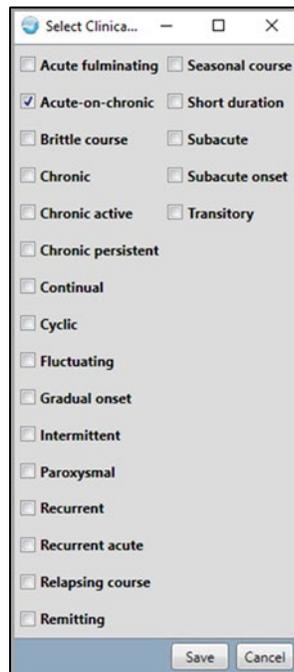


Figure 3-87: Select Clinical Courses dialog

- 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.

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

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

8. Select the applicable **Asthma Classification** from the drop-down menu.

**Note:** 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.

**Note:** Only one **Asthma Control** entry is allowed per visit.

9. In the **Date of Onset** field (optional), type a **date** in **xx/xx/xxxx** format or click the **Ellipsis** button (). The **Select Date** dialog (Figure 3-88) opens. Do one of the following:

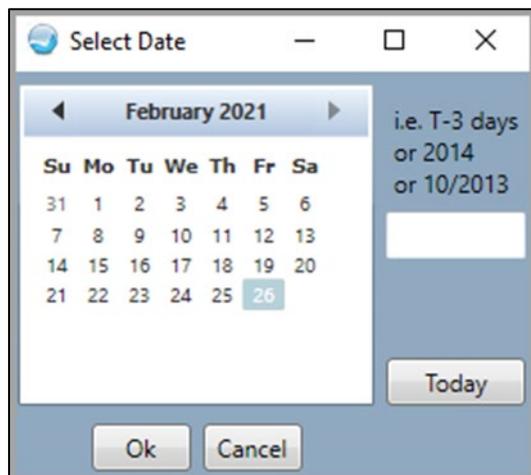


Figure 3-88: Select Date dialog

a. Select a date from the calendar, and then click **OK**. The date selected populates in the **Date of Onset** field.

- b. Click the **Now** button, then click **OK**. The **Date of Onset** populates with today's date.
  - c. 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.
10. If applicable, select the **Is Injury** check box. The **Injury** section (Figure 3-89) opens in the **Add Problem** (or **Edit Problem**) dialog.

**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 3-89: Injury Section dialog

- a. Select either the **First Visit** or **Re-Visit** option button, as applicable.
- b. 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.
- c. 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
  - Drug 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 (Figure 3-90) opens, showing only **E Coded** items.

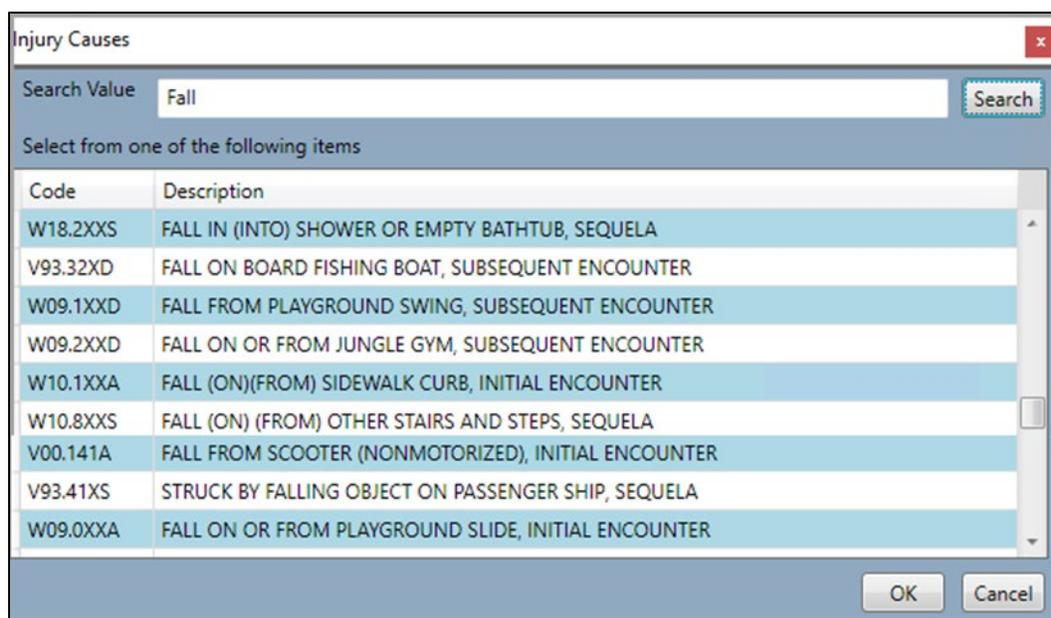


Figure 3-90: Injury Causes with E Codes dialog

- f. In **Lookup Option**, click either the **Lexicon** or **ICD** option button.
- g. 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.
- h. In the returned results list, select the **applicable item**, then click **OK**. Your selection shows in **Caused By** in the **Injury** section.
11. Type a **comment** in the **Comments** section, if needed.

12. 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 opens. Refer to Section 3.10 for instructions on how to complete this dialog.
  - 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.
13. Click **Save** in the top-right of the **Add Problem** dialog. 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.

### 3.8.2 Editing a Problem

To edit a problem, follow these steps:

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

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

3. Click the **Edit** button. The **Edit Problem** dialog (Figure 3-91) opens.

Figure 3-91: Integrated Problem List Maintenance – Edit Problem dialog

**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.

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

4. Edit fields as applicable. Refer to Section 3.8.1 for instructions on completing the fields.

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

5. In the **Comments** section, **add** or **delete** comments.

### 3.8.2.1 To Add Comments

1. Click the **Add** button. The **Add Comment** dialog (Figure 3-92) opens.

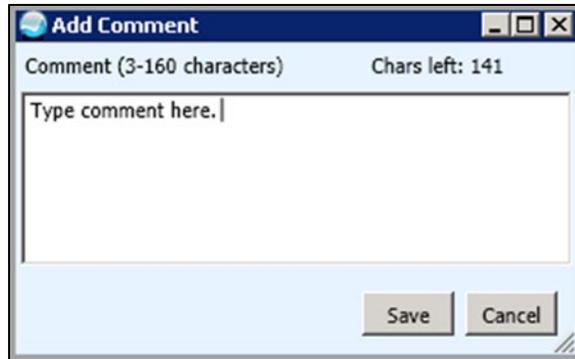


Figure 3-92: Add Comment dialog

2. In the **Comment** field, type a comment of **3-160 characters**.
3. Click **Save**. Your comment appears in the **Comments** section (Figure 3-93), 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.

Narrative	Date	Author
Type comments here.	11/11/2013	USER, DEMO
Add another comment.	11/11/2013	USER, DEMO

Figure 3-93: Comments List

### 3.8.3 To Delete Comments

1. Select one or more comments you want to delete. The line items are highlighted and the **Delete** button becomes active.
2. Click the **Delete** button. The following message (Figure 3-94) appears:

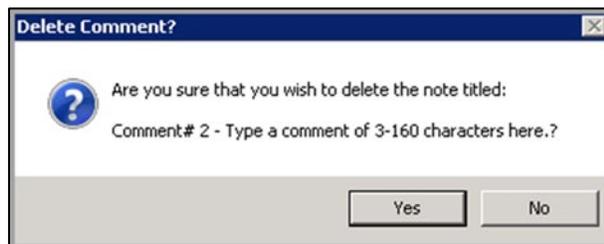


Figure 3-94: Delete Comment Confirmation Message

3. Click **Yes**. Your comment no longer appears in the list.
4. Click **Save** in the top-right of the **Add Problem** dialog.

**Note:** 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.

**Note:** 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.

### 3.8.3.1 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 (Figure 3-95) 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.

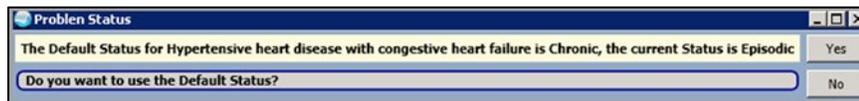


Figure 3-95: Problem Status dialog

### 3.8.4 Deleting a Problem

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. Refer to Section 3.4.1 details.
- 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 window.

The problem is cleared from the **Integrated Problem List** grid

### 3.9 Care Planning Feature

Clicking the **Expand All** button (  ) on the main **Integrated Problem List** window shows the following **Care Planning** information.

**Note:** The **Expand All** button changes to **Collapse All** if the **Care Plan** information is already expanded (Figure 3-96).

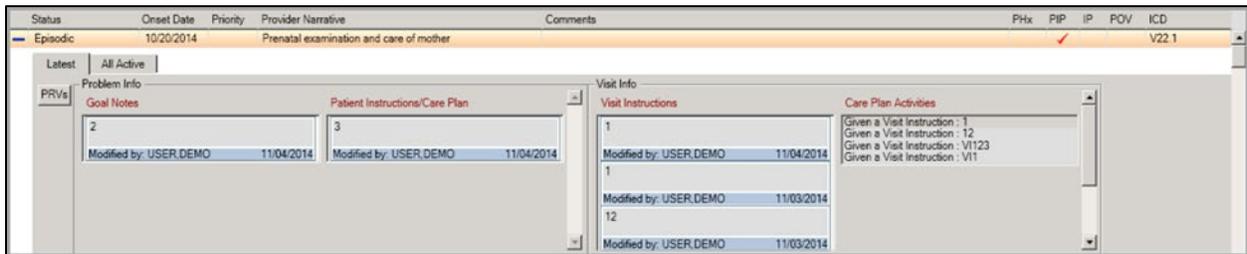


Figure 3-96: Expanded Care Plan dialog

- Goal Notes with a status for each date entered.
- Patient Instructions/Care Plan with a status for each date entered.
- Visit Instructions for each visit.
- Care plan activities for each visit.
- Whether any of the items above were modified, and if so, by whom and when (date/time).

#### 3.9.1 Latest Tab

On the **Latest** tab (Figure 3-97) of the **Care Plan** (displays when the **Plus** or **Expand All** is selected), the most recent active planning entries (all entries for most recent date for goal), patient instructions, last visit for visit instructions, and care planning activities are shown.

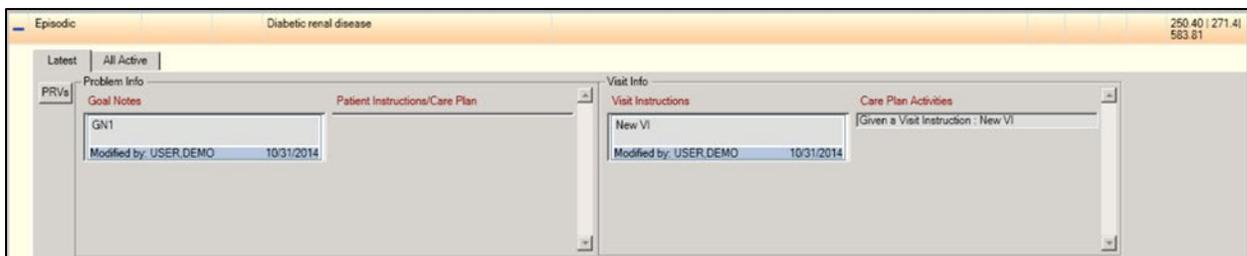


Figure 3-97: Latest Care Plan dialog

### 3.9.1.1 Selecting a Provider View Using the PRVs Button

1. Click the **PRVs** button to select a provider for which to view data. The **Provider List** dialog (Figure 3-98) opens.

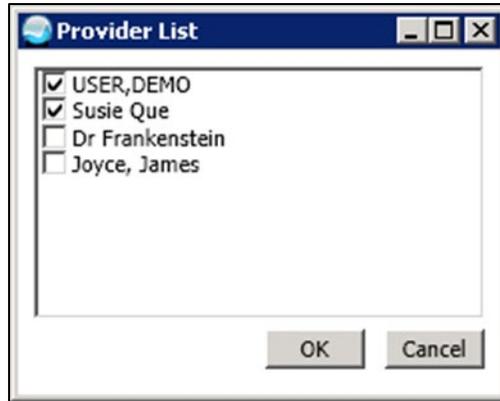


Figure 3-98: Provider List dialog

2. Select the check boxes to choose one or more **providers**, and then click **OK**. The **Provider List Results** dialog (Figure 3-99) displays.

A new tab is created for each provider selected. The new tab name is the provider name and enables easy viewing of that provider's entries for the patient and problems in the **Goal Notes, Care Plan, Visit Instructions, and Services**.

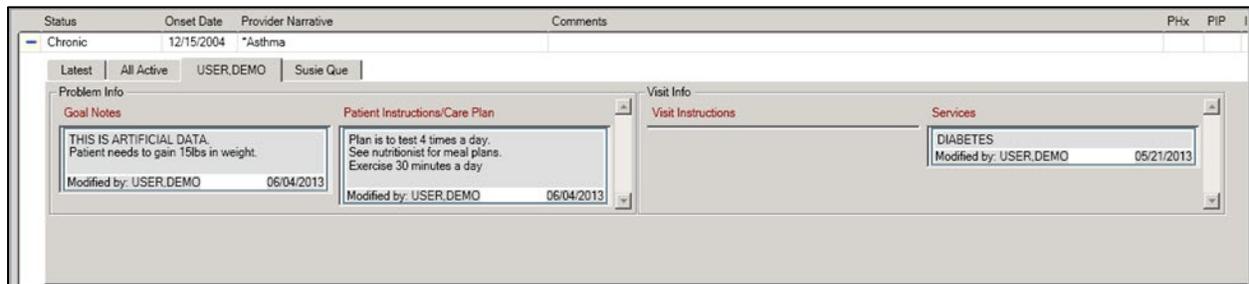


Figure 3-99: Provider List Results dialog

### 3.9.2 All Active Tab

On the **All Active** tab (Figure 3-100), all active care planning activities are shown.



Figure 3-100: All Active Care Plans

### 3.9.3 Adding, Replacing, Inactivating, and Deleting in Care Planning

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.

For example, a patient with PCOS who has a goal of getting pregnant, the care plan is very specific around fertility and medications safe during conception/pregnancy. After the pregnancy, her goal may change to managing hirsutism and metabolic effects of PCOS, and contraception. You would then inactivate the plan and write a new one (you may want to see the old care plan notes if she wants to try to conceive again).

**Important:**

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.

The following columns have a right-click menu (Figure 3-101):

- Goal Notes
- Care Plans
- Visit Instructions

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.

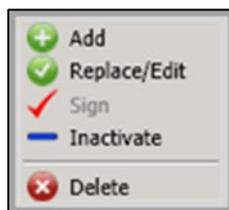


Figure 3-101: POV Right-Click Menu

- **Add:** The **Add** dialog (Figure 3-102) opens. Type the text and click **OK**. The text shows in the column.

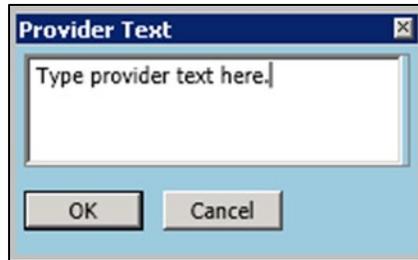


Figure 3-102: Add dialog

- **Replace:** The **Replace** function is used to edit existing text. A dialog (Figure 3-103) showing the original text opens. Type the edited text in the **Replacing Text** field and click **OK**. The edited text displays.



Figure 3-103: Replacing Text field

- **Sign:** The **Review/Sign** dialog (Figure 3-104) opens with a list of the items you added for you to sign. Type your **electronic signature**, and then click **OK**.

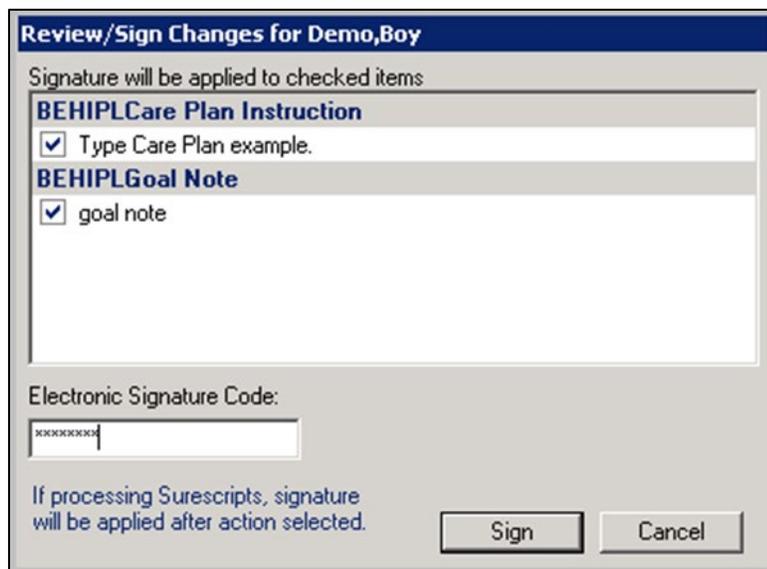


Figure 3-104: Review/Sign Changes for Patient Name for POV

- Inactivate:** This functionality is intended to inactivate the existing goal or care plan and initiate a new one (Figure 3-105). 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**.

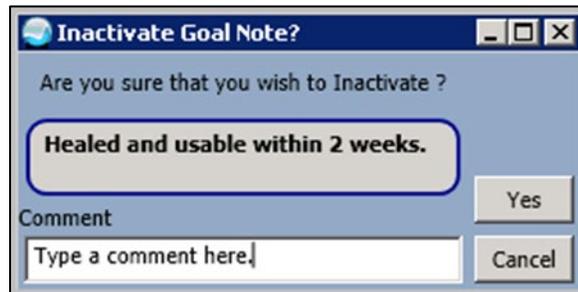


Figure 3-105: Inactivate Item dialog

- Delete:** The **Delete** dialog (Figure 3-106) opens to confirm your deletion. Click **OK**.

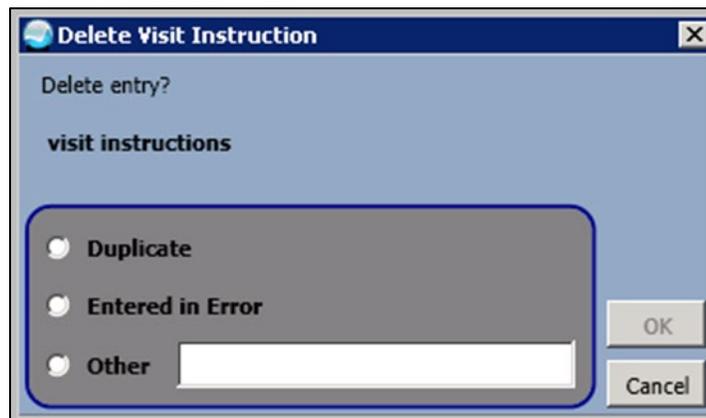


Figure 3-106: Delete Confirm dialog (signed entry)

**Note:** This is a logical delete. The record is deleted, but the comment is retained in the file in FileMan for future reference.

This is a **normal** delete.

The **Delete** dialog below (Figure 3-107) appears when the instruction is unsigned. It removes the information entirely from the record, and the information is not retained in the file in **FileMan**.

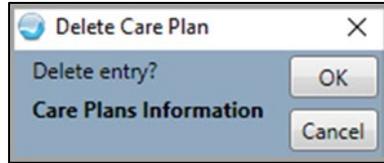


Figure 3-107: Care Plan Normal Delete dialog (unsigned)

1. Add any free-text information in the **Prov. (Provider) Text** field by selecting **Add** from the right-click menu. The **Provider Text** dialog (Figure 3-108) opens:

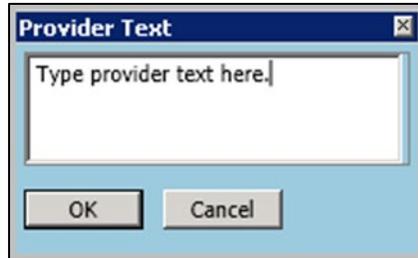


Figure 3-108: Provider Text dialog

- a. Type provider text to include more detail regarding the problem for **TODAYS ENCOUNTER** only. 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 with (existing) **Text** and **Replacing Text** fields opens:
  - c. Type the **new provider text** in the **Replacing Text** field.
  - d. Click **OK**. Your change shows in the **Prov. Text** column.
2. 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 (Figure 3-109) opens.
    - Click the **Template** button () to select a template, if needed.

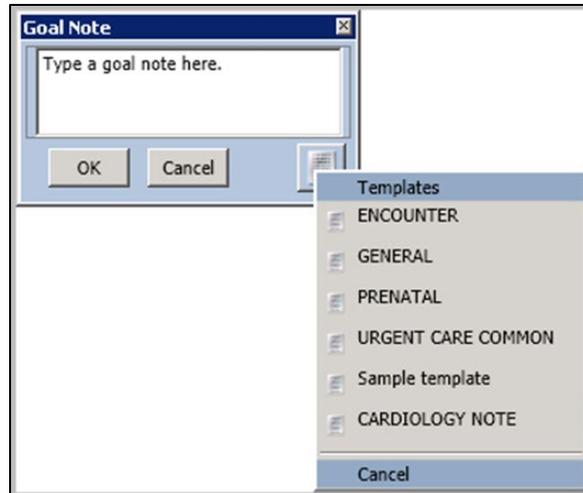


Figure 3-109 Goal Notes dialog with Templates Menu dialog

- You can also type over an existing **Goal Note** by clicking in (or selecting) the text and making your changes.
- 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 opens.
- Click the **Template** button (  ) to select a template, if needed.
- You can also type over an existing **Care Plan** by clicking in (or selecting) the text and making your changes.

**Important:**

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.

### 3.10 Adding Visit Instructions/Goal Notes/Care Plan Activities

When adding or editing a problem if the **Use as POV** check box is selected, the **Add Visit/Care Plans/Goal Activities** button (Figure 3-110) is enabled for adding, inactivating, or deleting visit instructions, goals, or Care Plan information. Refer to Section 3.4 for additional information.

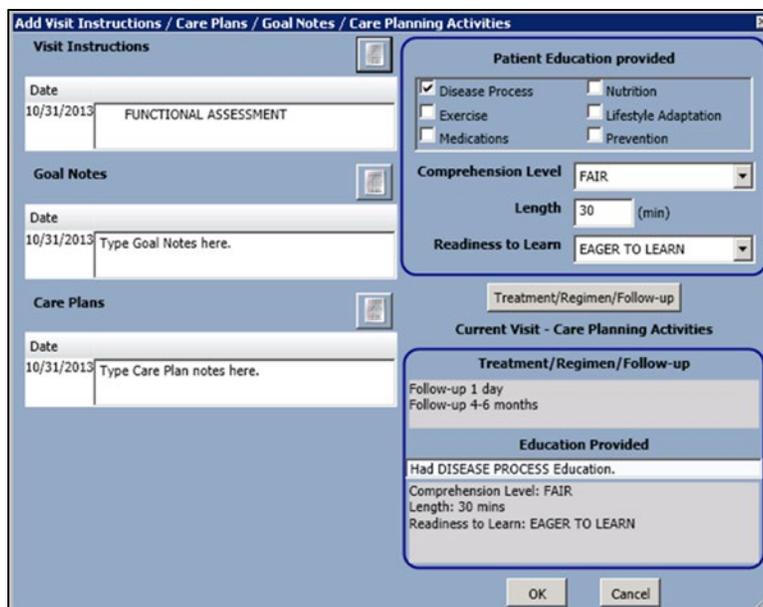


Figure 3-110: Add Visit Instructions/Care Plan/Goal Notes/Care Planning Activities dialog

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** (Figure 3-111) opens.

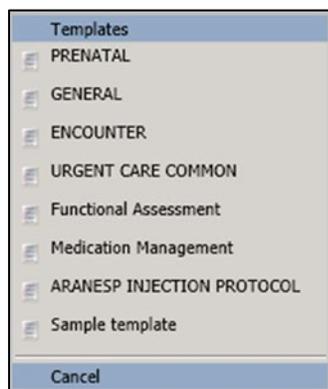


Figure 3-111: Templates List

- b. Select a **template**. The template window opens.
  - Your selected template name appears in the **Visit Instructions**, **Goal Notes**, or **Care Plans** fields, 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 3-112).

Figure 3-112: Medication Management Template dialog

- c. Make any necessary changes and click **OK**.
  - Repeat Steps 1 and 2 above. 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 (Figure 3-113) opens.

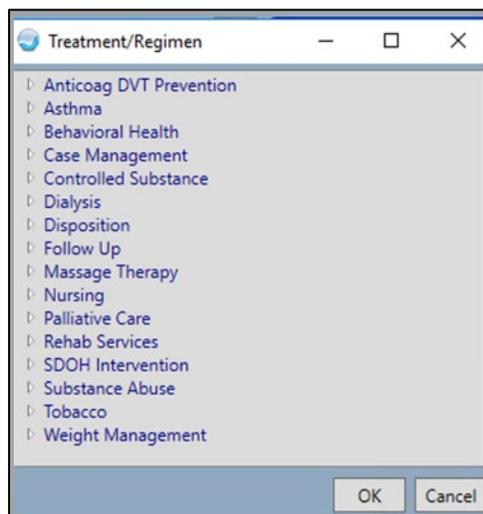


Figure 3-113: Treatment/Regimen dialog

- a. Click the **small arrow** next to 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** dialog (Figure 3-114) 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 or the **Review/Sign Changes** dialog to delete your changes.

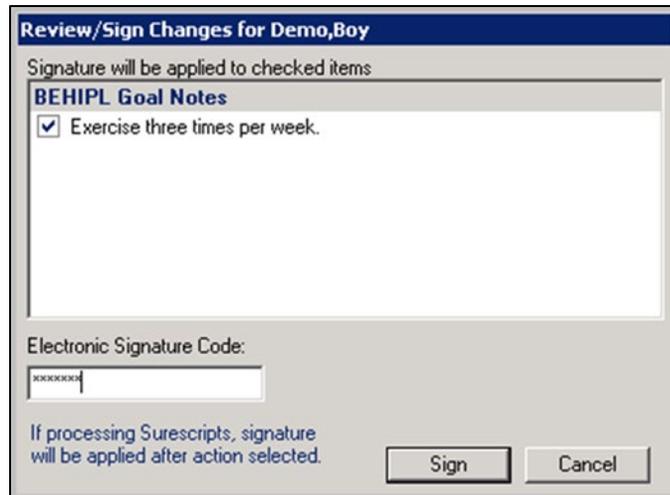


Figure 3-114: Review/Sign Changes for Patient Name dialog

Refer to Section 3.9 for adding, editing, and replacing instructions. The **Add/Edit** window for **IPL** contains the same functionality.

**Important:**

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.

## 4.0 Triage Summary

The **Triage Summary** (Figure 4-1) displays PCC data and orders entered for the chosen visit. It does NOT display POVs and procedures. Its primary purpose is to provide clinicians with the necessary information to determine the **POV**, **E&M code**, and **help** in displaying information for note writing.

**Important:** This is a view only component. There is nothing that users can enter.

Triage Summary		
	Type	Result
Education	Completed	ABNG-HELP LINE
Exams	Completed	FALL RISK
Health Factors	Completed	YES
Orders	Chemistry:	BNP-PRO RED/SERUM SP ONCE Indication: Asthma-chronic obstruct pulmonary dis... *UNSIGNED*
Orders	Consults:	CASE MANAGER Cons Consultant's Choice Indication: Allergic asthma caused by Dermatophagoid... *UNSIGNED*
Orders	Nursing:	>> EKG
		EKG now *UNSIGNED*
Orders	Outpt. Meds:	LISINAPRIL TAB 2.5MG

Figure 4-1: Triage Summary Panel example

### 4.1 Right Click Menu

The **Triage Summary** component has a right-click menu (Figure 4-2).

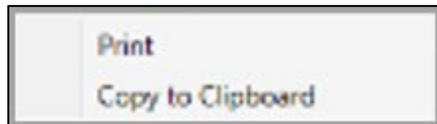


Figure 4-2: Triage Summary Right-Click Menu

The **Copy to Clipboard** option copies all of the text in the triage summary component. Users can then paste this information into a free-text field within the EHR or into another application (like MS Word).

Follow these steps to use the **Print** option:

1. Select **Print** on the right-click menu to display the **Nursing Summary** pop-up (Figure 4-3).

Nursing Summary

Chief Complaint

STRUBLE 1) Patient complains ofDiarrhea, Dizziness, Moderate Dizziness for 2 Days.  
 STRUBLE 2) Patient reportsleg pain.  
 STRUBLE 3) Patient requestsConsult.  
 STRUBLE 4) SHOW BILL THE MONEYDizziness.  
 STRUBLE 5) Patient complains ofChest congestion.  
 STRUBLE 6) Patient reportsleg pain.  
 STRUBLE 7) Patient requestsMedical Supply.

Vitals

HI: 60 in 152.4 cm  
 WI: 160 lb 72.57 kg  
 BMI: 31.25  
 BP: 175/50 mmHg  
 TMP: 98.6 F 37 C  
 PU: 80 /min  
 RS: 10 /min  
 O2: 97 %

Skin Tests

Given TETANUS

Education

Completed ABNG-HELP LINE

Exams

Completed FALL RISK

Health Factors

Completed YES

Orders

Chemistry: BNP-PRO RED/SERUM SP ONCE Indication: Asthma-chronic obstructive pulmonary dis... \*UNSIGNED\*

Orders

Consults: CASE MANAGER Cons Consultant's Choice Indication: Allergic asthma caused by Dermatophagoid... \*UNSIGNED\*

Orders

Nursing: >> EKG  
 EKG now \*UNSIGNED\*

Orders

Outpt. Meds: LISINAPRIL TAB 2.5MG  
 TAKE ONE (1) TABLET BY MOUTH DAILY  
 Quantity: 30 Tablet Days: 30 Refills: 11 \*Chronic Med: YES Dispense as Written: NO Indication: Asthma-chronic  
 obstructive pulmonary dis... \*UNSIGNED\*  
 QUINAPRIL TAB 10MG  
 TAKE TWO (2) TABLETS BY MOUTH DAILY  
 Quantity: 60 Tablet Days: 30 Refills: 11 \*Chronic Med: YES Dispense as Written: NO Indication: Asthma-chronic  
 obstructive pulmonary dis... \*UNSIGNED\*

Font Size: 9

Print... Close

Figure 4-3: Sample Nursing Summary Pop-up

- If needed, adjust the font size in the **Font Size** field. This adjusts the size of the text on the pop-up (but does not change the font size on the output, when printing).
  - If needed, print the information by clicking **Print** to display the **Printer Selection** dialog box. Select a printer on which to output the text of the **Nursing Summary**.
2. Click **Close** to dismiss the pop-up.

## Appendix A BGO Picklist Update Option Description

In this patch, a feature is delivered to assist in managing and updating synchronized national IPL PickLists, while giving flexibility on management of local modifications made to these lists.

### A.1 Central PickLists

**Central PickLists** are picklists the national DTS team provides for IPL use in EHR-RPMS.

Periodically, DTS delivers updates to these **Central PickLists**. Changes might include adding new items, inactivating items, delivering new SNOMED subsets, or inactivating entire SNOMED subsets. In order to incorporate these updates, an option called **BGO PICKLIST UPDATE** must be completed in RPMS.

Prior to EHR patch 38, if a user ran the **BGO PICKLIST UPDATE** option in RPMS to update these central picklists, the update would over-ride any local modifications that had been made to the lists.

For example, a facility may have chosen to import a **Central PickList** using the **Import Subsets** button option from the **Edit Picklist** dialog (Figure A-1). Figure A-2 shows the drop-down menu that displays when the **Import Subset** option is selected.

PickList	Hosp. Location	Clinic	Provider	Class	Owner
Nursing *					HESS, BARBARA
Abnormal Findings					
ABNORMAL FINDINGS					
Administrative					
Adverse Reactions					STRUBLE, FAY
Audiology					
Behavioral Health					
Behavioral Health Long					
BH-Social Family Issues					
BH-SUD					
Cardiology					

Figure A-1: Edit Picklist dialog with Import Subset button

Figure A-2 shows the **SNOMED Subset Options** drop-down menu that displays when the **Import Subset** option is selected.

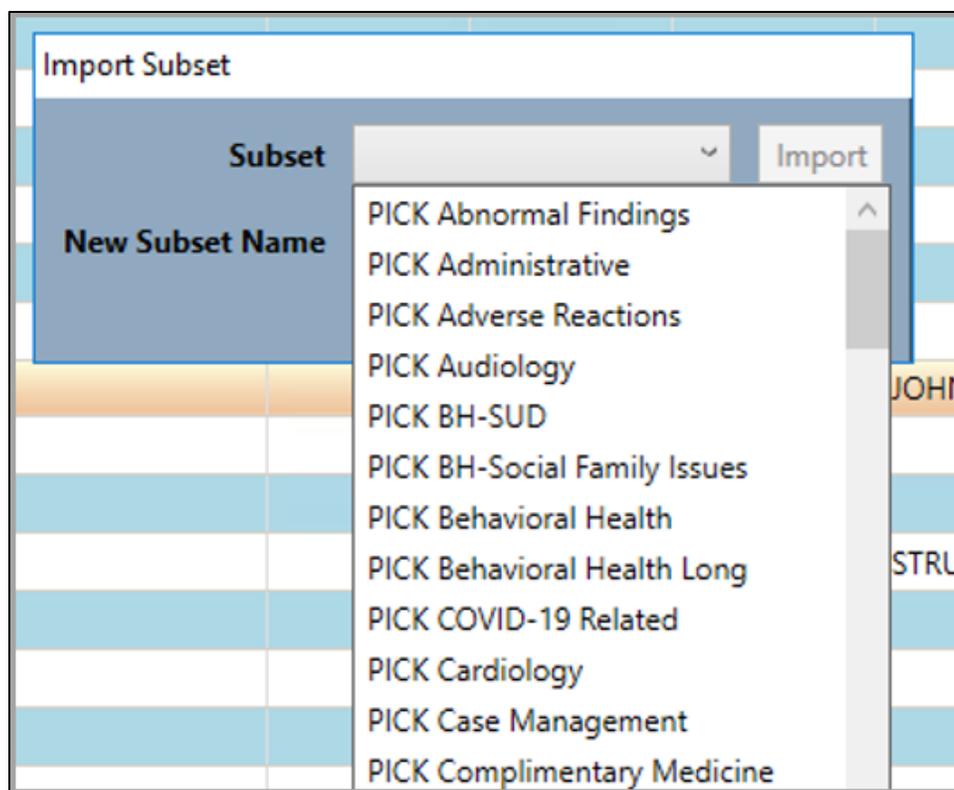


Figure A-2: Drop-Down Menu of SNOMED Subset Options for Use as Picklists

Once imported, the users may have chosen to remove several items that are not commonly used at their facility and add other items to meet local needs. If the user then subsequently used the **BGO PICKLIST UPDATE** option in RPMS a few months later when a new DTS update was delivered, that action would update the central picklist, but remove the local modifications that had been made.

This new feature in EHRp38 is meant to give the user the benefit of receiving automatic updates from DTS in these situations while also being able to review and keep local modifications intact for a nationally synchronized and locally modified picklist.

Before running the **BGO PICKLIST UPDATE**, it is important to understand what has been done locally for current picklists and what the update will do in order to reach the desired outcome.

### A.1.1 Suggested Approach

After the **EHRp38 installation**, review the picklists in the **EHR GUI**.

- A new field will display in the **Manage Quick Picks** dialog called **Synchronized National PickList**.

- If a picklist name is displayed there, the picklist is synchronized to the **Central/National PickList** (Figure A-3) and will receive the updates when the **BGO PICKLIST UPDATE** option is run.
- If nothing is displayed in the **Synchronized National PickList** field, then the picklist is considered **local only** and will not receive automatic updates when the **BGO PICKLIST UPDATE** option is run.

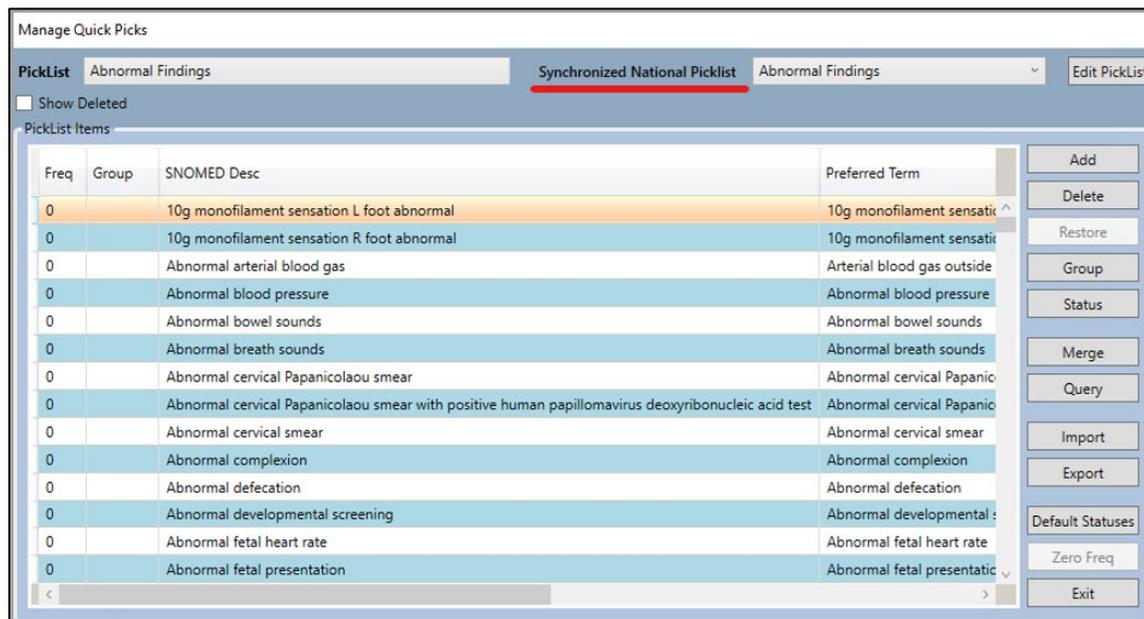


Figure A-3: Picklist that is Synchronized to a National PickList example

- If a picklist is not synchronized to a **National PickList**, it can be synchronized at any time by choosing an option from the **Synchronized National PickList** drop-down menu.

**Note:** If the user chooses to synchronize an existing local list to a **National PickList**, all codes from that national list will be added to the local list. If a code already exists, it will not duplicate it. The list can then be further customized as desired locally.

- The user can view the additions and deletions that result from synchronization, running the **BGO PICKLIST UPDATE** option, and/or local manual manipulations, by viewing the **Added** and **Deleted** columns of the presented list.
- To view the **Deleted** column, ensure the **Show Deleted** checkbox is selected in the upper left-hand corner.

PickList Items									
Freq	Group	SNOMED Desc	Preferred Term	Status	SNOMED Concept ID	SNOMED Desc ID	Added	Deleted	
0		Abdominal pain	Abdominal pain		21522001	36112013			•
0		Abnormal sexual function	Abnormal sexual function		56925008	94664018			
0		Accidental excessive dose of vaccine administered	Accidental excessive dose of vaccin		788095009	3778869010	•		
0		Accidental injury of intestine during surgical procedure	Accidental injury of intestine during		1162578008	4590231010			
0		Accidental lithium and/or lithium compound overdose	Accidental lithium and/or lithium cc		1162818005	4591615018			
0		Accidental valproate overdose	Accidental valproate overdose		1162805002	4591513017			
0		Accidental vitamin D and/or vitamin D derivative overdose	Accidental vitamin D and/or vitamir		1162824004	4591627015			

Figure A-4: Picklist Showing Items that were Added and Deleted example

- Once all picklists have been reviewed for their synchronization status, the user can move to the **BGO PICKLIST UPDATE** option in RPMS.

**Note:** This is not an option that is on a standard menu. It must be added to the appropriate users as a secondary menu option.

- When a user navigates to the **BGO PICKLIST UPDATE** option (Figure A-5), the first prompt will read:

```
Update SNOMED Picklists
Would you like to sync with DTS SUBSETS Automatically (all locally added
SNOMED CT will be deleted)
Enter Y or N? No//
```

Figure A-5: BGO PICKLIST UPDATE option

**Note:** The default is **NO** and what will likely be chosen most of the time.

If you enter **YES** (there will be a confirmation prompt), then all **Local PickLists** that are synced/linked with a **DTS subset** will be updated to only contain linked **DTS Subset SNOMED CT** codes. No local modification will remain.

**Local Picklists** with no linked **DTS subset** will remain untouched even if this synchronization option is run.

- Once a selection is chosen, the system will create a temporary file to hold the comparison information between the **Local PickList (BGO SNOMED Preferences file)** and **DTS Subsets** to find any discrepancies and report this to the user and allows them to decide what action should be taken for each discrepancy. The system messages to the screen this process is running.
- The system displays the results field and the action options (Figure A-6) that can be used.

```
Interactive Picklist Update
Creating a Temp Comparison File with
DTS.....
```

```

Results:
Found in DTS - Local PickList does not contain the DTS Subset SNOMED CT
entry
    Actions: Add or Ignore (Logical delete)
Found in DTS* - Local PickList does contain the DTS Subset SNOMED CT entry
but is already logically deleted. (Ignored thru previous BGO PICKLIS UPDATE
process or deleted in EHR)
    Actions: Add or Ignore (Logical delete)
Found Locally - Not found in DTS was added locally to the Local PickList
    Actions: Keep or Remove (System delete)
Found Locally* - Linked DTS Subset no longer exists
    Actions: Keep or Remove (System delete)
    
```

Figure A-6: Results Field and the Action Options example

- The user is then presented with this prompt to be able to view the results:

```
Select a SUBSET or A for all: //
```

- A single or double **question mark (??)** at this prompt will show all the subsets in the queue for assistance in selecting individual lists as needed.
- To begin, select **A** for **All**.

The system presents a **ListMan** screen with:

- The Header Name **BGO PICKLIST UPDATE**.
- Date/Time** the process ran.
- Page **X** of **X** number of screen pages (15 entries per screen).
- DTS SUBSET/Local PickList Name** (subheader).

In the example below (Figure A-7), the **DTS SUBSET** name is **PICK Abnormal Finding**, and the **Local PickList** name is **Abnormal Findings**.

If there is no link to a DTS Subset, there will be an **asterisk (\*)** in the first space instead of the name of the **DTS Subset**, **\*/Abnormal Findings** would indicate no linked **DTS Subset** for this list.

<b>BGO PICKLIST UPDATE</b>		Jan 24, 2025 15:27:26	Page:	1 of 1
<b>PICK Abnormal Findings/Abnormal Findings</b>				
	<b>SNOMED CT</b>	<b>Preferred Term</b>	<b>Results</b>	<b>Actions</b>
1	1290960005	Plain X-ray of chest abnormal	Found in DTS	Add or
2	168582005	Plain X-ray lumbar/sacral spi. abnormal	Found Locally	Keep or
3	168734001	standard chest X-ray abnormal	Found Locally	Keep or

Figure A-7: ListMan View of Picklist Update Results example

The screen contains the following columns to aid in managing PickLists:

- SNOMED CT
- Preferred Term

- Results
- Action/Change
- Status

**Note:** The user will need to use the arrow keys to view all of the columns

2. View Figure A-8 after using **Arrow** key to scroll right:

BGO PICKLIST UPDATE		Jan 24, 2025 15:39:51	Page: 1 of 1
PICK Abnormal Findings/Abnormal Findings			
Preferred Term	Results	Actions/Change	Status
Plain X-ray of chest abnormal	Found in DTS	Add or Ignore	A
Plain X-ray lumbar/sacral spi. abnormal	Found Locally	Keep or Remove	K
Standard chest X-ray abnormal	Found Locally	Keep or Remove	K

<<< Enter ?? for more actions			
AD Add	K Keep	NS New SUBSET	
IG Ignore	R Remove	AP Apply Changes	
PR Print	S Save	EX Exit	
Select Action:quit//			

Figure A-8: Picklist Update Column Options example

At this point the user can work through all of the picklists in the queue and take action on each entry as desired, **Add**, **Ignore**, **Keep**, or **Remove**.

**Note:** **Local PickLists** with no linked **DTS Subset** will be presented in the resulting queue of picklists at the top for review each time a new **DTS Update** is available. The user must review and confirm if the items there should be kept or removed, as they were not compared to **DTS Updates** as part of this process because these lists are not linked/synced to anything. The system gives the user the chance to review the completely local lists for accuracy. At this time, there is no way to skip over the completely local lists in the queue.

- When one picklist in the queue is complete, continuing to press **Enter** will take the user to the next picklist.
- **Quit** will take the user to the next picklist in the queue.
- **Ex** for **Exit** will exit the process entirely.
- **S** for **Save** will save the actions.

**Note: Save often.** It is possible to exit the list without saving accidentally with no confirmation/warning.

- If the user does not make it through the entire queue in one session, the work is saved (as long as the **Save** option has been used).
- When ready to work on the queue again, enter the **BGO PICKLIST UPDATE** option again.

**Note:** Once you have done any work on at least one **SNOMED CT** entry in any **Local PickList** by performing an action and saving the work, the initial compare process will not run again unless asked to.

Users will see the following prompt.

```
Do you want to view already saved items? Yes//
```

- The default is **Yes**. Choose this if you want to keep the changes that have already been made and continue working through the queue. This will be the most common option. You will be taken back to the top of the queue and may enter through the work already done. Alternatively, you can note which picklist you were working on when you left and when you return, select that specific picklist at the prompt:

```
Select a SUBSET or A for all: //
```

- If, for some reason, you want to erase the work already done, you can select **No** at the prompt. You will then be presented with a confirmation prompt.

```
Please confirm as all previously saved changes will be lost.?//
```

- To continue, you can force the comparison to run again and a new temporary file will be created. You will be presented with the list as if it were the first time you ran the update.

## A.1.2 Apply Changes

- Using **Apply Changes** at the end of the queue will apply all saved changes.
- When a new **DTS Update** comes out, the process will be repeated.

**Important:** When you have finished working through the queue, you will need to select **Apply Changes** (Figure A-9) to save and finalize all of your work.

If accessing via the menu options within the picklist review screens, the option is not available unless you've addressed all lists in the queue – you will see the message:

**Apply Changes is not applicable until all entries are managed.**

Apply Changes can also be accessed if a selection is not chosen at the **Select a SUBSET** prompt (enter through this prompt and then the save and print options are shown) as seen in Figure A-10.

If Apply Changes is selected as in Figure A-10, there is no indication to the user that it actually applied, but it did. If you use Apply Changes in this manner, before the entire list has been managed, it will apply and push out all saved changes you made to the picklists presented to the users in the EHR GUI. Your work so far is effectively delivered to the EHR GUI. However, for the update user accessing the queue of lists through **BGO PICKLIST UPDATE**, you will notice that after Apply Changes has been used, entering the **BGO PICKLIST UPDATE** option again will prompt a new temporary comparison file to be generated. When reviewing the queue at that point, you will see changes you made prior to using the **Apply Changes** option that involved the **Remove** or **Add** actions to items on the picklists will be reflected in the lists presented in the queue.

However, you will also notice that **Keep** or **Ignore** actions that were taken and saved prior to Apply Changes in this scenario will be presented to the person running the **BGO PICKLIST UPDATE** again.

Using Apply Changes in this manner is a way to push updates out to users for picklists before the entire queue is complete, but you will want to understand that Keep or Ignore selections you made previously will be re-presented to you and can be skipped over if you note which lists you have already reviewed and go straight to the particular picklist you are ready to work on next.

```

+      Enter ?? for more actions      >>>
AD  Add          K  Keep          NS  New SUBSET
IG  Ignore       R  Remove       AP  Apply Changes
PR  Print        S  Save          EX  EXIT
Apply changes is not applicable until all entries are managed.
Click enter key to continue: //

```

Figure A-9: Showing Apply Changes Option from List Manager and Message it is Not Available example

```

select a SUBSET or A for all: //

      select one of the following:

          S      Save changes
          A      Apply changes
          P      Print changes
          E      Exit

Do you want to Save/Apply changes: // █

```

Figure A-10: Showing Apply Changes Option example from Select a SUBSET prompt

## A.2 Tips and Tricks

- You may want to print the lists to aid in tracking in a future release.
- Complete one update fully before the next DTS Update is loaded.

## 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 website:

<https://home.ihs.gov/security/index.cfm><http://security.ihs.gov/>.

<p><b>Note:</b> Users must be logged on to the IHS D1 Intranet to access these documents.</p>
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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 ROB 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.

## 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:** <https://www.ihs.gov/itsupport/>

**Email:** [itsupport@ihs.gov](mailto:itsupport@ihs.gov)