**SECTION I: Adding a user**

Adding user Check list:

1. Add using AVA IHS provider/person add/edit menu option
2. Edit User, User management menu option
   1. Make sure to give them the correct person class according to their credentials:

Reference site, <https://npiregistry.cms.hhs.gov/>

1. Add Keys
   1. Reference document, Excel Sheet “Copy of user template”
2. according to their duties, assign to mail groups, I added some groups but this list is not all inclusive
   1. RCIS Staff need to be added to:

BMC IHS ALERT - A Bulletin is sent when a IHS Type Referral is entered

BMC INHOUSE ALERT - A Bulletin is sent when a INHOUSE Type Referral is entered

BMC OTHER ALERT - A Bulletin is sent when a OTHER Type Referral is entered

* 1. CAC staff to:

PXRM ERROR – receive mail man messages with reminder errors

TIU CACS – This cross-reference identifies the people who should receive

informational bulletins concerning the implementation of the Text

Integration Utilities (TIU) Package.

DGPF Local Flag (if your site created a local mail group, use that local group instead)

* 1. HIM staff to:

TIU MIS ALERTS - This mail group is for the purpose of receiving problem alerts for

TIU. These alerts should be for problems in TIU Notes that are caused by

a system bug. It is meant as a management tool - not an alert system for

the end user.This mail group is for the purpose of receiving problem

alerts for TIU. These alerts should be for problems in TIU Notes that are

caused by a system bug. It is meant as a management tool - not an alert

system for the end user.

BEHOCCD HIMS TOC - HIMs people who should get an alert when a new TOC document is generated

DGPF Local Flag (if your site created a local mail group, use that local group instead)

* 1. Pharmacy staff:

GMRA MARK CHART -

GMRA P&T COMMITTEE FDA

GMRA REQUEST NEW REACTANT

GMRA VERIFY DRUG ALLERGY

GMRA VERIFY FOOD ALLERGY

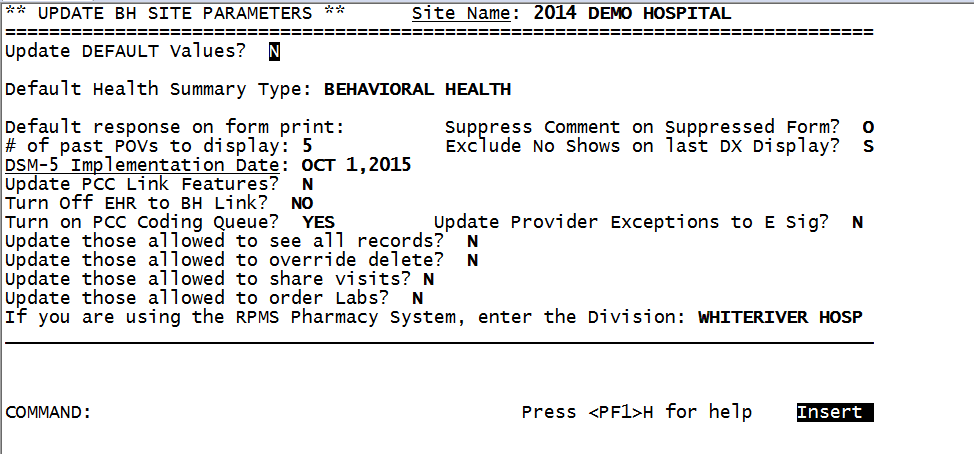
* 1. BCMA Coordinators staff to:

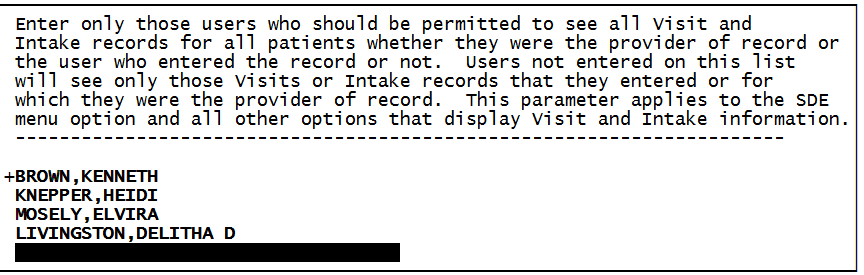
BCMA ISSUES - This is a mail group for BCMA issues

Will be used in BCMA Site Parameters set-up

\*\*\*may be other mail groups that I am not aware of, consult RPMS package manuals and installation notes\*\*\*\*

1. Setup Electronic Signature
2. **For clinician that have schedule clinics**, create clinic in scheduling package
3. **Behavior health providers**, add them to the “update those allowed to see all records”





1. For sites that assign patient to providers and use the PCP Team setup, go into the Primary Care Provider add this provider to the team
2. Give them a TIU user class according to their credentials
3. If the provider is an in-house referral service, assign them to the correct consult team

**STEP 1: Adding User as a Provider** (use PER Add/Edit New Persons if they do not perform patient care)

Select User Management Option: **AVA**

Select IHS Provider/Person Add/Edit Option: **PRV**

ADD/EDIT PROVIDERS

Use this option to add new providers to your system OR to edit those already in the system. You do NOT need to enter the provider as a person first. Just use this option.

Enter NEW PERSON's name (Family,Given Middle Suffix): **DEMO,PHX-AO DOCTOR**  P

DD PHYSICIAN

NAME: DEMO,PHX-AO DOCTOR//

INITIAL: PDD//

SEX: MALE//

DOB: AUG 15,1975//

TITLE: PHYSICIAN//

SSN: 321551199//

SERVICE/SECTION: MEDICAL STAFF//

STREET ADDRESS 1: **(Facility’s address)**

STREET ADDRESS 2:

STREET ADDRESS 3:

CITY: **PHOENI**X

STATE: **AZ** ARIZONA AZ

ZIP CODE: **85004**

PHONE (HOME):

OFFICE PHONE:

FAX NUMBER:

EMAIL ADDRESS: **DEMO.DOCTOR@PHX.AO**

**PROVIDER CLASS:** **MD**

**(Use the following site to determine the PROVIDER CLASS and CODE)**

<http://www.ihs.gov/scb/index.cfm?module=W_PROVIDER_DISC&option=list&num=50&newquery=1>

1 MD

2 MDA MEDICAL ASSISTANT

CHOOSE 1-2: **1** MD

AFFILIATION: **IHS** IHS

**CODE:** **00**

IHS LOCAL CODE:

MEDICARE PROVIDER NUMBER: (The facility’s #)

MEDICAID PROVIDER NUMBER: (The facility’s #)

UPIN NUMBER:

AUTHORIZED TO WRITE MED ORDERS: **Y**  YES

DEA#: ?? **(All providers should have a DEA number)**

Enter the DEA number 2 letters 7 numbers (optional 2-character extension).

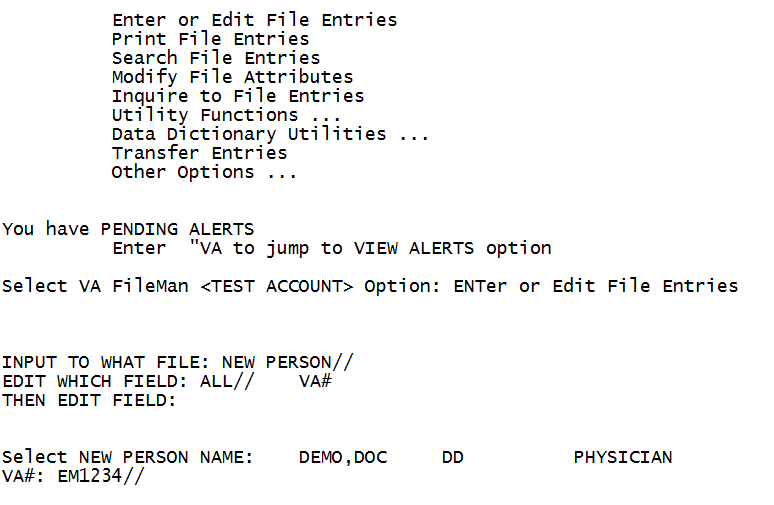
Enter the DEA number as two upper case letters followed by 7 digits

e.g. AA1234567. Each provider must have a unique number.

A suffix of up to two alphanumeric characters may be appended (optional).

DEA EXPIRATION DATE:

\*\*\*if user does not have a DEA and they are prescribing providers, you will need to go into fileman, new person file and enter a VA#, using this format (Initials followed by last 4 of social, example EM5558)



SPI: \*\*\*IF your site is an e-RX site, add the SPI# here plus add your facility, or clinic, or pharmacy fax number\*\*\*

PROVIDER TYPE: **FULL** FULL TIME

REQUIRES COSIGNER:

USUAL COSIGNER:

REMARKS:

Select STATE OF LICENSEURE: **AZ** ARIZONA AZ

Are you adding 'ARIZONA' as a new STATE OF LICENSURE (the 1ST for this PROVIDE

R)? No// **Y**  (Yes)

LICENSE NUMBER: **A13254Z**

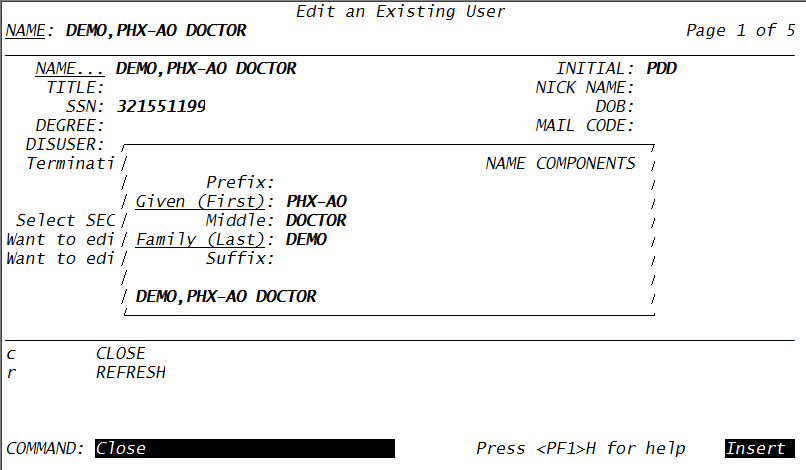
Disabled pending intial upload.

Press RETURN to continue:

\*\*\*\*add menus, fileman access code, person class and other important data\*\*\*\*

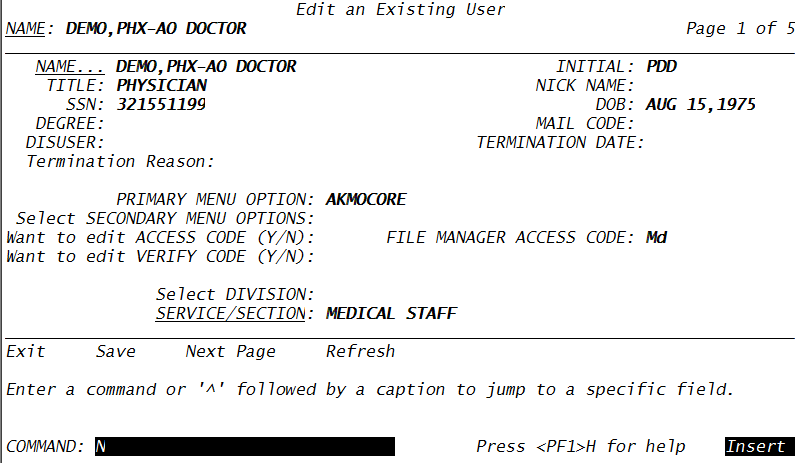
Select IHS Kernel Option: **USRM**

Select User Management Option: **EDIT an existing user**

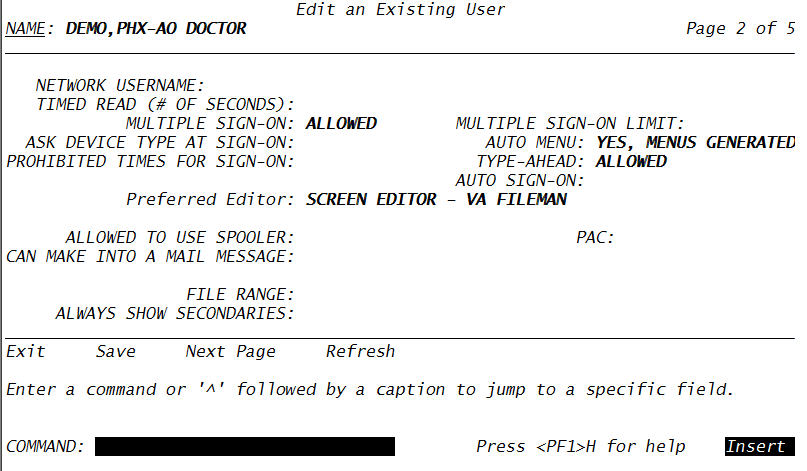


COMMAND: **C**

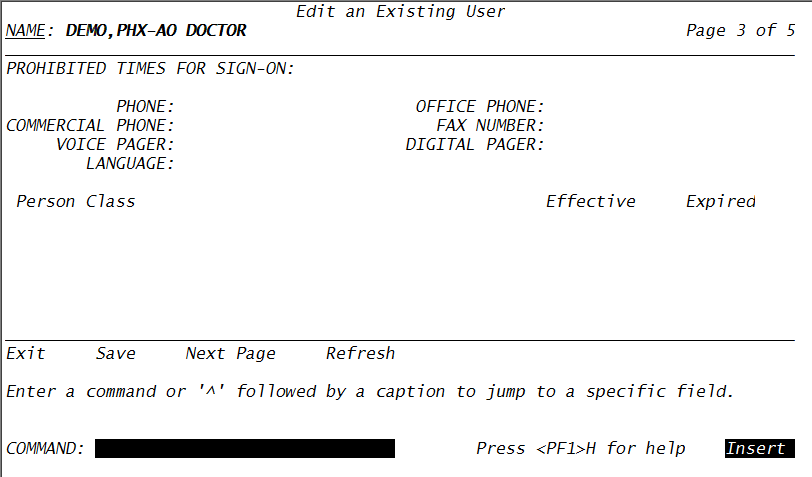
**STEP 2. Adding Additional Information**



COMMAND: **N**

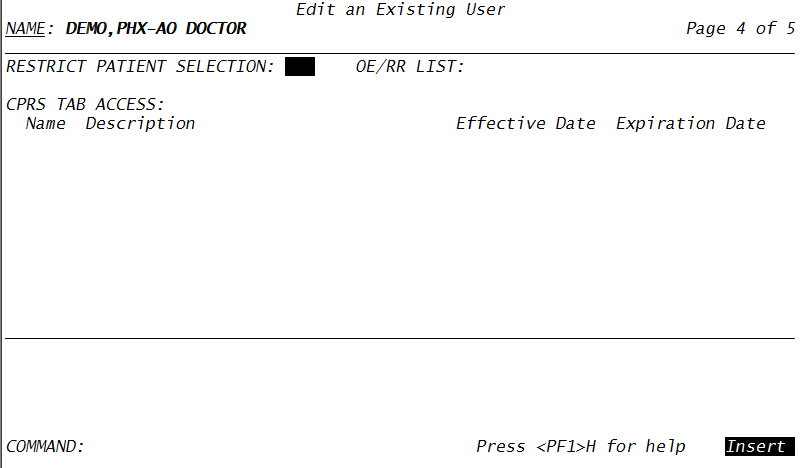


COMMAND: **N**

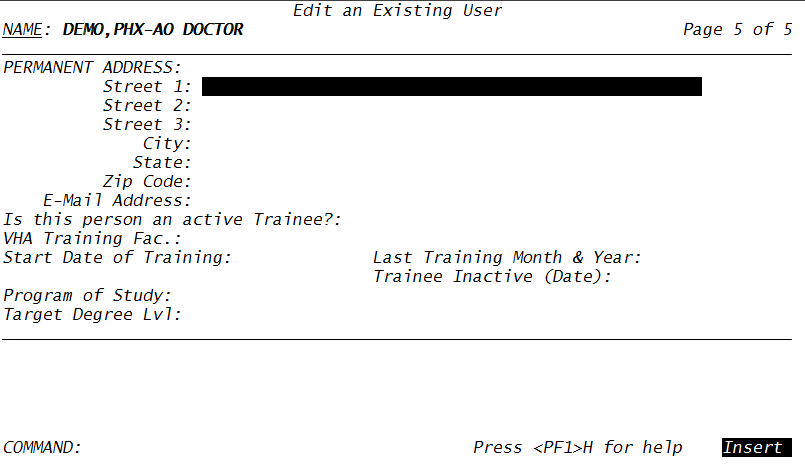


Person Class: using the providers NPI got to <https://nppes.cms.hhs.gov/NPPESRegistry/NPIRegistryHome.do> to get the Person Class.

COMMAND: **N**



COMMAND: **N**



Type an **S** then an **E** to save and exist.

Enter a command or '^' followed by a caption to jump to a specific field.

**STEP 3. Grant Access by Profile**

**If you have created clean user templates, clone the new user against that user otherwise add security manually via**

**KEYS Key Management ...**

**\*\*\*use the excel sheet attach for guidance on keys\*\*\***

Select User Management Option: **Grant Access by Profile**

Batch Entry of New Persons

--------------------------

\*\*\*\*for the script use the demo doc below or clone using a user on your database\*\*\*\*

Please select a person to copy from

Template PERSON: **DEMO,HOPI DOC** HD PHYSICIAN

Is this the person whose data you want cloned? **Y**

You may enter a date, when the users that are being created/updated will no longer have access to the system.

Enter (optional) TERMINATION DATE:

Batch Entry of New Persons

--------------------------

Clone of: DEMO,HOPI DOC

Enter NEW PERSON's name (Family,Given Middle Suffix): **DEMO,PHX-AO DOCTOR** P

DD PHYSICIAN

DEMO,PHX-AO DOCTOR is an existing user. Do you want to include? **YES**

Clear out KEYS, FILES, SECONDARY MENUS first? **YES**

Do You Want To Clone PERSON CLASS? **NO** (Should always answer NO)

Next!

Enter NEW PERSON's name (Family,Given Middle Suffix):

Where do you want to print the COMPUTER ACCOUNT NOTIFICATION LETTERS?

DEVICE: HOME//

CONVERTING DEMO,PHX-AO DOCTOR'S ACCOUNT OVER

One moment please...

USER ACCOUNT NOTIFICATION

2014 DEMO HOSPITAL

40 NORTH CENTRAL AVE

SUITE 605

PHOENIX, AZ 85340

PHX-AO DOCTOR DEMO

MEDICAL STAFF (MD)

---

CONVERTING DEMO,PHX-AO DOCTOR'S ACCOUNT OVER

A user account has been created in your name to enable you to access on-line clinical and/or administrative data required to perform your duties as an employee of Indian Health Service. Please read the enclosed NEW USER INFORMATION before you attempt your first log-on to the system. Questions about access should be referred to the AIS Application Coordinator in your service, your facility Information Security Officer (ISO), or your IRM Service.

Your Computer Access Coordinator is:

MOSELY,ELVIRA

345

338-3785

Your Facility Information Security Officer:

Elvira Mosely

Your Alternate Information Security Officer:

---

Access Code: OQMN316

Verify Code: 9734PLK}

COMPUTER ACCOUNT ACCESS POLICY

INDIAN HEALTH SERVICE

2014 DEMO HOSPITAL

PHX-AO DOCTOR DEMO

MEDICAL STAFF (MD)

As an authorized user of IHS RPMS/EHR SYSTEM and having access to data stored in them, I will be given sufficient access to perform my assigned duties. I will use this access ONLY for its intended purpose and understand the following policies that apply to IHS data and computer systems policies:

I agree to safeguard all passwords (e.g., Access/Verify codes, electronic signature codes) assigned to me and am strictly prohibited from disclosing these codes to anyone including family, friends, fellow workers, supervisor(s), and subordinates for ANY reason.

I understand that I may be held accountable for all entries/changes made to any government information system using my passwords.

I am aware of the regulations and facility information system security policies designed to ensure the confidentiality of all sensitive information. I am aware that information about patients or employees is confidential and protected from unauthorized disclosure by law. I understand that my obligation to protect IHS information does not end with either the termination of my access to this facility's systems or with the termination of my government employment.

I will exercise common sense and good judgment in the use of electronic mail. I understand that electronic mail is not inherently confidential and I have no expectation of privacy in using it. I understand that technical or administrative problems may create situations which requires viewing of my messages. I also understand that facility management officials may authorize access to my electronic mail messages whenever there is a legitimate purpose for such access.

I understand that a violation of this notice constitutes disregard of a local and/or IHS policy and will result in appropriate disciplinary action as defined in IHS employee conduct Regulations as well as suspension/termination of access privileges.

I affirm with my signature that I have read, understand, and agree to fulfill the provisions of this User Access notice.

Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

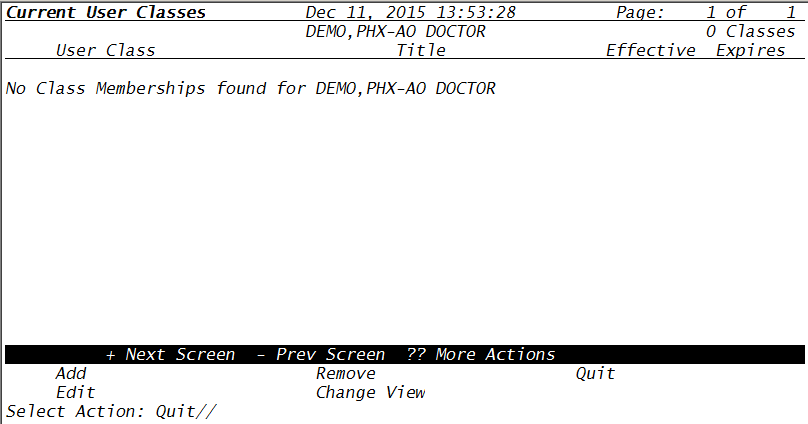
PHX-AO DOCTOR DEMO MEDICAL STAFF MD

RETURN THIS FORM TO: IRMS - NEW ACCTS (xxx/xxx)

**STEP 4. Adding a TIU User’s Class**

Follow this menu path: **TIUM > TMM > UCM > UCM2**

Select USER: **DEMO,PHX-AO**



Select Action: Quit// **ADD**

Select USER CLASS: PHYSICIAN

1 PHYSICIAN

2 PHYSICIAN ASSISTANT

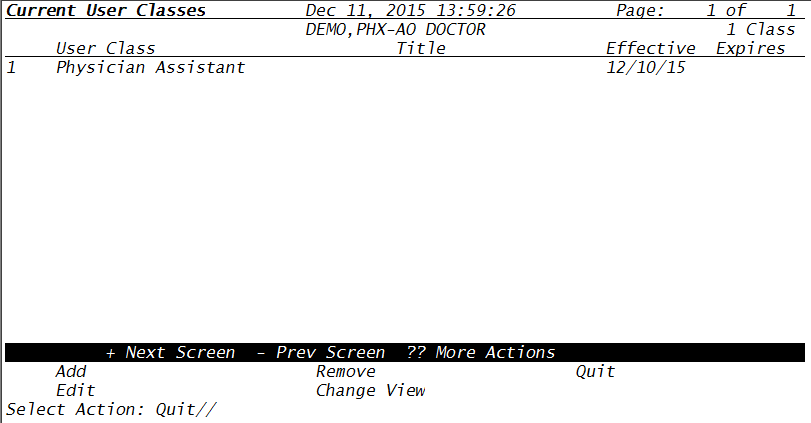
CHOOSE 1-2: **2**

EFFECTIVE DATE: **T-1**

EXPIRATION DATE:

TITLE:

Select Another USER CLASS:

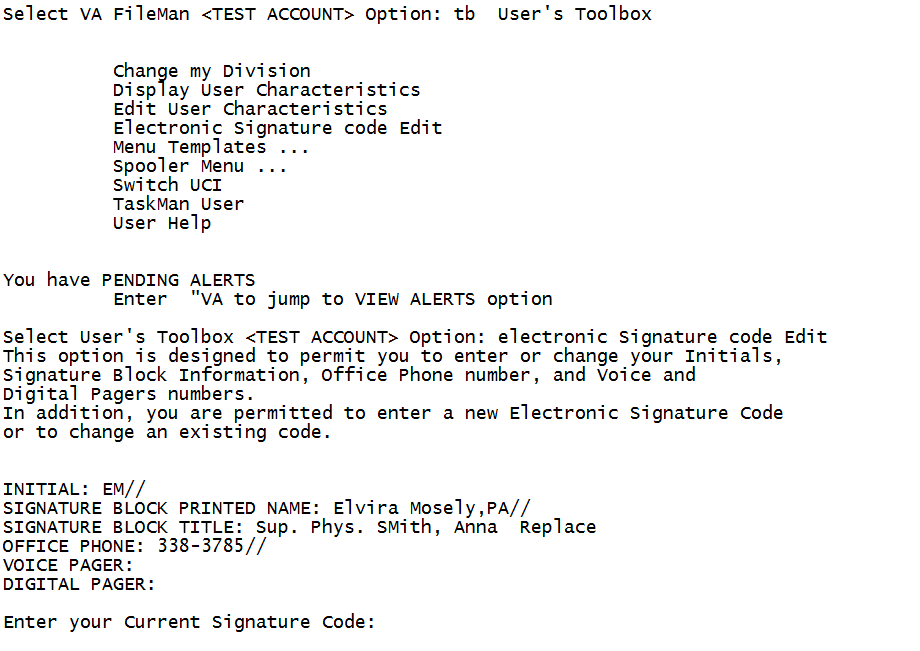


**Step 7: Create Clinic, Add to mail group, add to EHR Consult teams, add provider Primary Care Team.**

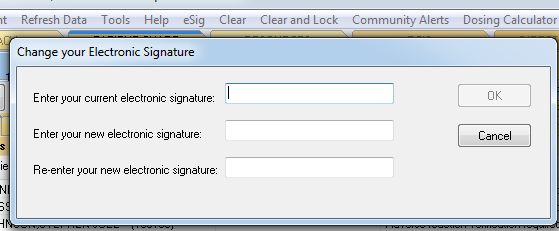
**\*\*\*following through step 7 depends on the provider’s credetials and duties\*\*\*\***

**Step 6 Assist user with electronic signature**

Have the user sign into RPMS and assist them with their electronic signature block and other credentials



Assist them with electronic signature, they can created the signature in EHR or in RPMS.



Finally have that provider sign into EHR. Assess whether the provider can:

1. Create a visit
2. Add themselves to the provider box
3. Enter health factor, exam, pov, etc
4. Can they order
5. Do they get prompted for electronic signature
6. Can they add a note
7. Assist with creating top note title list
8. Assist with creating lab flowsheets or report flowsheet

**SECTION II: Inactivating a provider**

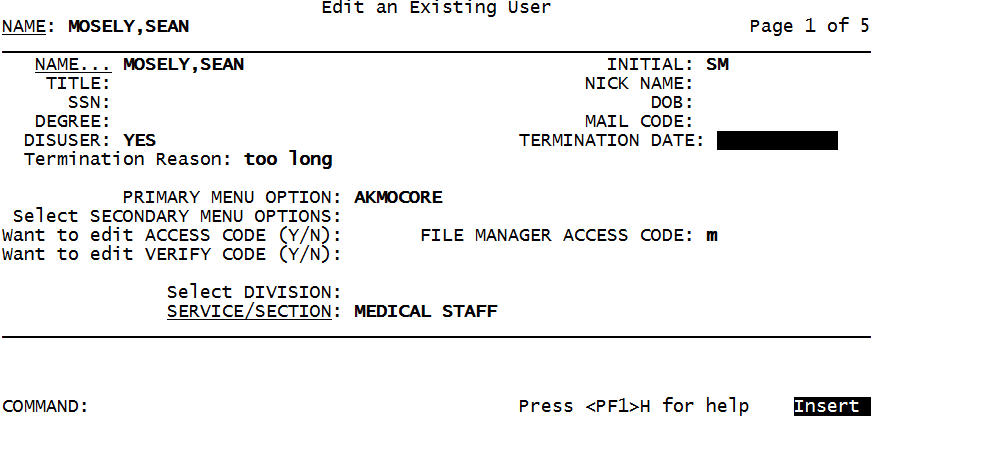
Removing user check-list:

1. Assign a surrogate
2. Take away RPMS access
3. De-activate provider
4. DE-activate clinic (if any)
5. Remove from mail groups and consult teams
6. PCP – Assign patient to new team or provider.
7. Review provider’s deficiencies and assign as appropriately

**STEP 1: Take away access to RPMS**

usrm User Management

Select User Management Option: edit an Existing User



User will not be able to log into RPMS or EHR

**STEP 2: Inactivating a Provider/user**

Select User Management Option: **AVA**

Select IHS Provider/Person Add/Edit Option: **INA**

INACTIVATE/REACTIVATE A PERSON/PROVIDER

Use this option to enter an INACTIVE DATE for a Person or Provider. To deactivate a user, please use the option on the USER EDIT menu. To REACTIVATE a person or provider, enter an "@" at the Inactive Date prompt. Then proceed to the ADD/EDIT PROVIDERS option to insure all the data is current.

Select NEW PERSON NAME: **DEMO,PHX**-AO DOCTOR PDD PHYSICIAN

INACTIVE DATE: **T** (DEC 11, 2015)

Disabled pending intial upload.

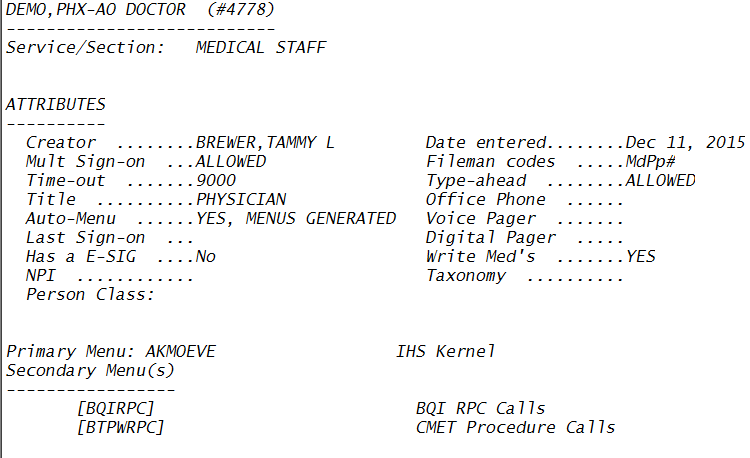
Press RETURN to continue:

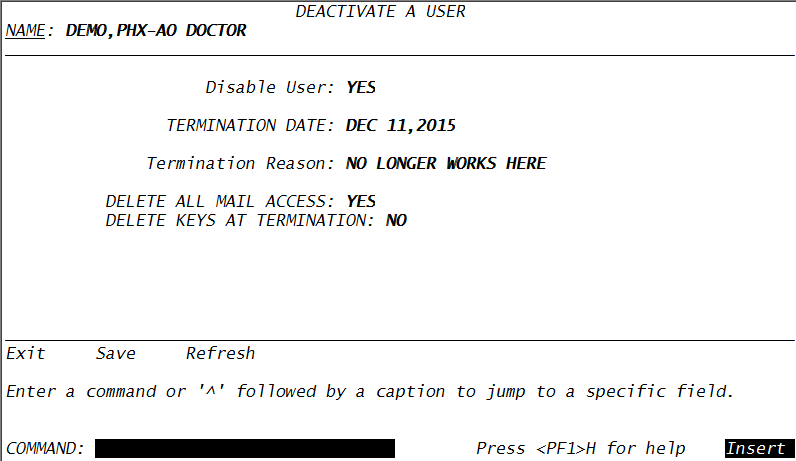
Select NEW PERSON NAME:

Select User Management Option: **Deactivate a User**

DEMO,PHX-AO DOCTOR PDD PHYSICIAN

View/Print User Inquiry Data? Yes//





COMMAND: **S** and then **E** to Save and Exist

DEMO,PHX-AO DOCTOR will be deactivated now. Do you wish to proceed? YES//

... DONE

**Step 3. Remove the User Class**

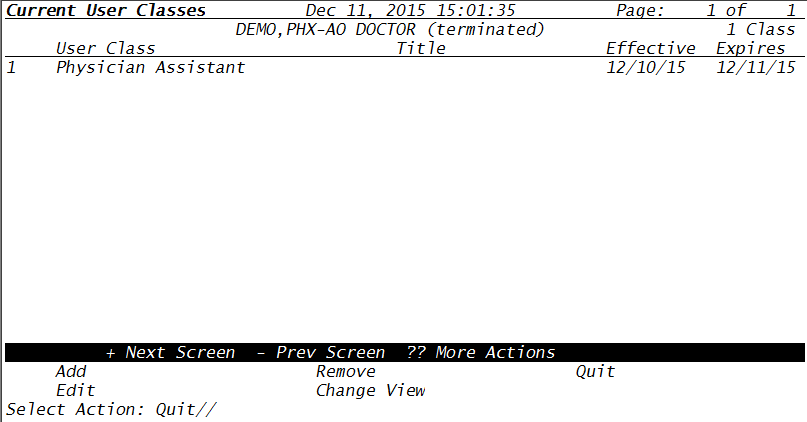
\*\*\*they will not be selectable as a visit provider in EHR\*\*\*

Follow this menu path: **Core > TIUM > TMM > UCM > UCM2**

User Class Management Menu

(2014 DEMO HOSPITAL)

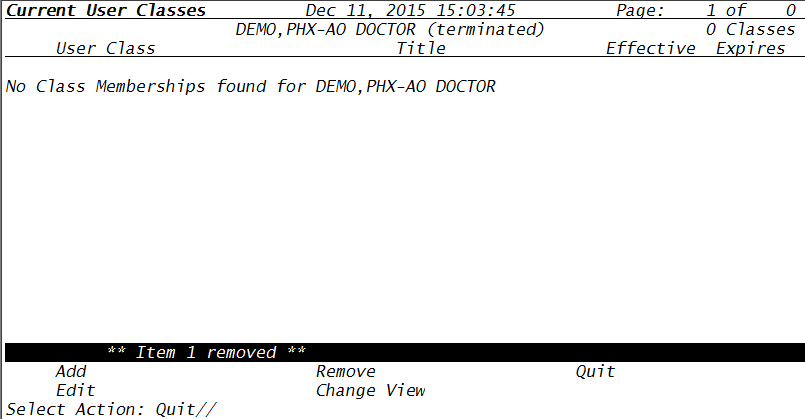
Select USER: **DEMO,PHX**



Select Action: Quit// **REMOVE**

Removing DEMO,PHX-AO DOCTOR from PHYSICIAN ASSISTANT

Are you SURE? NO//**YES**



**Step 4. For Provider with a scheduled clinic**

Before we inactive the provider’s schedule, we need to:

1. Run a report for appointment that did not get check-in or are scheduled.

**\*\*\*if your facility does not run this report routinely, then you may have to set the date as far back as when your provider was 1st hired. \*\*\***

AL Appointment List

AM Appointment Management

CR Chart Requests

CHK List Patient Check In Status

DA Display Patient's Appointments

MB Multiple Appointment Booking

MC Multiple Clinic Display/Book

MD Month-at-a-glance Display

PL Print Scheduling Letters

PS View Provider's Schedule

WL Waiting List Enter/Edit

PCP Primary Care Provider Menu ...

PMR Patient Mini Registration

**SCR Reports Menu (Scheduling) ...**

SCS Supervisor Menu (Scheduling) ...

CRA Cancel/Restore Clinic Availability

SET Set Up a Clinic

Select Scheduling Menu Option: **SCR** Reports Menu (Scheduling)

Select Reports Menu (Scheduling) Option: **AMR** Appointment Management Reports

Use this option to access reports designed to assist you in managing your appointment statuses. Workload Reports require knowing whether an appointment tool place, so each must be checked-in or marked as a no-show. One report also helps you track if all checked-in appointments are being coded in PCC.

1. Appointment Management Statistics

2. Appointments Requiring Action

3. Uncoded Checked-in Appointments

4. Eligibility Appointment List

5. Cancelled Appointment Listing

6. On-line Help (Report Descriptions)

Select REPORT: (1-6): **2**

Use this report to list all appointments with no status or with a status of "No Action Taken". All Workload and statistical reports will not be accurate until these appointments have an appropriate status added.

Select one of the following:

C Clinic

P Principal Clinic

V Provider

T Team

Subtotal Report by: **C** Clinic

Select division: 2014 DEMO HOSPITAL// 8999

Select another division:

Would you like a preexisting Clinic Taxonomy?? NO//

Select clinic: ALL// **BOOT** BOOT \*inactivated on JAN 19, 2016

Select another clinic: **BREWER APPTS** BREWER,TAMMY L

Select another clinic:

Would you like to save this clinic list as a Taxonomy?? NO//

**Select First Date to Search: jan 1 1970 (JAN 01, 1970)**

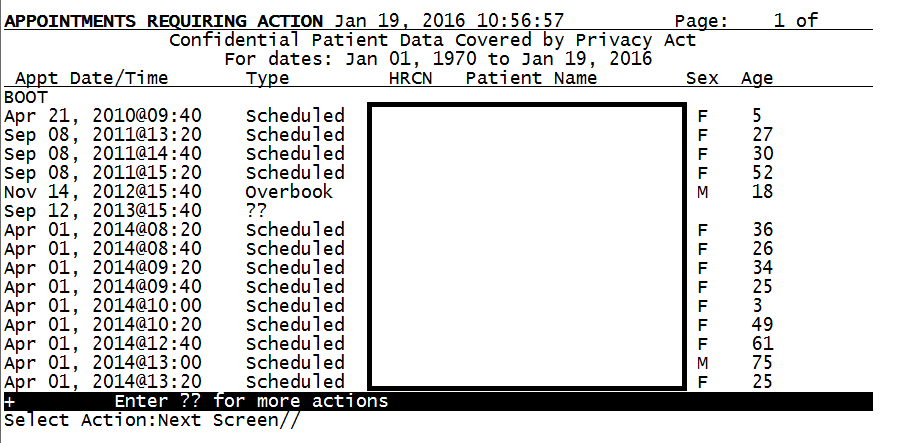
**Select Last Date to Search: t (JAN 19, 2016)**

Select one of the following:

B BROWSE ON SCREEN

P PRINT ON PAPER

PRINT MODE: BROWSE// ON SCREEN



1. Get provider’s clinic waitlist if any. If you inactivate the clinic before moving these patients over to a new waitlist or appointment, you will lose that data.

AL Appointment List

AM Appointment Management

CR Chart Requests

CHK List Patient Check In Status

DA Display Patient's Appointments

MB Multiple Appointment Booking

MC Multiple Clinic Display/Book

MD Month-at-a-glance Display

PL Print Scheduling Letters

PS View Provider's Schedule

**WL Waiting List Enter/Edit**

PCP Primary Care Provider Menu ...

PMR Patient Mini Registration

SCR Reports Menu (Scheduling) ...

SCS Supervisor Menu (Scheduling) ...

CRA Cancel/Restore Clinic Availability

SET Set Up a Clinic

Select Scheduling Menu Option: **WL** Waiting List Enter/Edit

Use this option to manage your waiting lists for both outpatient clinics or inpatient wards. Only application coordinators may add new clinics or wards as waiting lists. Once a list is selected, you can select how the list will be displayed. Options are Patient Name, Date Added to List, Priority, and Recall Date. From that list, you may add new patients, edit or view existing entries, remove patients from active status or request a listing of closed cases.

Select WAITING LIST CLINIC OR WARD: ?

Answer with WAITING LIST CLINIC OR WARD

Do you want the entire 55-Entry WAITING LIST List? y (Yes)

Choose from:

BOOT

BRAMER-FORTIER

BREWER APPTS

You may enter a new WAITING LIST, if you wish

Enter Clinic or Ward Name.

Answer with HOSPITAL LOCATION NAME

Do you want the entire 498-Entry HOSPITAL LOCATION List? n (No)

Select WAITING LIST CLINIC OR WARD: **BOOT** MOSELY,ELVIRA

...OK? Yes// (Yes)

Select one of the following:

**P Patient Name**

D Date Added to List

O Priority

R Recall Date

Sort By: Patient Name// **Patient Name**



Moving patients to a new waitlist,

AD,xxxxx, GENE

DATE ADDED TO LIST: FEB 18,2014//

REASON ADDED TO LIST: F/U PATIENT; NO SCHEDULE YET

//

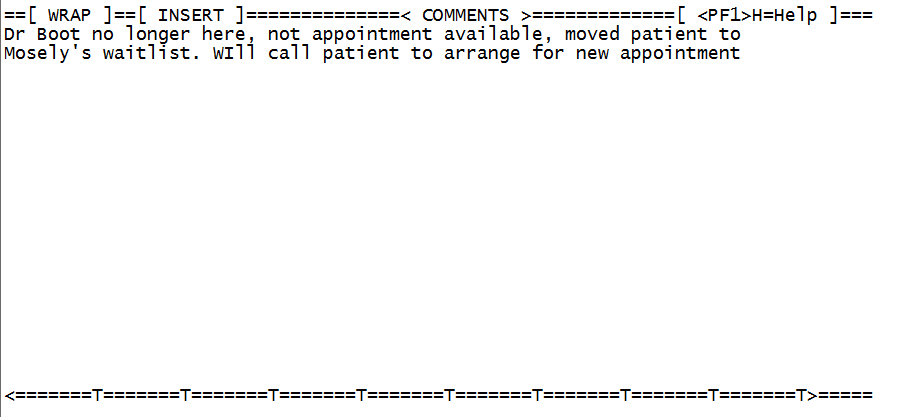
PRIORITY: MIDDLE// \*\*\*\*change priority here\*\*\*\*

PROVIDER: BOOT,ExxxxxxTH A//

RECALL DATE: FEB 14,2015// t (JAN 19, 2016)

COMMENTS:

No existing text

Edit? NO//

**F1 key E key** to save and exit

Date of Last Registration Update: MAR 25, 2014

PO BOX 891

ALB, NEW MEXICO 87119

555-555-9036 (home) (work)

Does patient's address or phone # need to be updated? NO//N \*\*but if you enter yes, you can edit the demographic information for this patient.

Or you can remove that patient from the waitlist and give them an appointment.

\*\*\* If you need more time to move patient into the appropriate waitlist of appointment, you can cancel the availability of this clinic, this prevents users from booking appointments into this clinic,

Cancel availability so that no user can schedule an appointment with this provider while you are still working on this clinic’s waitlist and schedule appointment

ACM Application Coordinator Menu ...

CPF Clinic Profile

CRA Cancel/Restore Clinic Availability

DSU Display Scheduling User

EEL Enter/Edit Letters

IWL Wait List Activate/Inactivate

LAM List Appts Made By Clinic

MON Month-at-a-glance Display

SET Set Up a Clinic

Select Supervisor Menu (Scheduling) Option: **CRA** Cancel/Restore Clinic Availability

Use this option to either CANCEL or RESTORE a clinic's appointment slots.

You can CANCEL a clinic's availability for either a whole day or portion of a day. If several portions of a day are to be canceled you must cancel one portion first, then select CANCEL again to cancel the second portion, etc.

You can RESTORE the availability for a previously canceled clinic. Appointments that were rescheduled using the auto-rebook feature at the time of cancellation WILL NOT be moved to their original time slots.

Select one of the following:

C CANCEL CLINIC AVAILABILITY

R RESTORE CLINIC AVAILABILITY

Select Action: **C** CANCEL CLINIC AVAILABILITY

Select CLINIC NAME: **BOOT**

CANCEL 'BOOT' FOR WHAT BEGIN DATE: **T** (JAN 19, 2016)

CANCEL 'BOOT' FOR WHAT END DATE: <enter>

\*\*\*\*Now you are ready to add that patient to a new waitlist, but remember that it is best to provide that patient with an appointment then to transfer them to another waitlist.\*\*\*\*

Finally once you have scheduled and transfer patient to the new either waitlist or given an appointment, we can then inactivate the clinic.

**SCS** Supervisor Menu (Scheduling) > **ACM** Application Coordinator Menu

Select Application Coordinator Menu Option: **IRC** Inactivate/Reactivate Clinic

Choose INACTIVATE to render a clinic inactive (no activity) allowed) as of a selected date. Choose REACTIVATE to set the date from which point the inactivation of a clinic is terminated.

For INACTIVE clinics, you may want to change the clinic name, remove the abbreviation and principal clinic link. Use the Set Up A Clinic option to make those changes.

Select one of the following:

I INACTIVATE CLINIC

R REACTIVATE CLINIC

Select Action: **INACTIVATE CLINIC**

Select CLINIC NAME: **BOOT** MOSELY,ELVIRA

Enter Date Clinic is to be Inactivated: **T** (JAN 19, 2016)

Clinic will be inactivated effective 01/19/2016

**STEP 5:**

Remove them from:

1. Mail groups
2. PCP teams
3. EHR Consult team