RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Scheduling for Windows
(BSDX)

User Manual

Version 2.0
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PREFACE

This manual provides information you need to understand and use the IHS Clinical Scheduling for Windows (BSDX) package. The IHS Clinical Scheduling for Windows package is based on an easy-to-use graphical user interface (GUI) for scheduling appointments.

This manual contains reference information about the IHS Clinical Scheduling for Windows package, examples of its processes, and procedures by which you can perform the activities supported by the package. Step-by-step procedures are provided to aid in your use of the IHS Clinical Scheduling for Windows package.

SECURITY

The IHS Clinical Scheduling for Windows (BSDX) uses security keys to limit user's ability to change system set-up parameters and patient information. In other words, not all features are available to all users. Contact your site administrator to determine or change your security keys.

RULES OF BEHAVIOR

All RPMS users are required to observe HHS and IHS Rules of Behavior regarding patient privacy and the security of both patient information and IHS computers and networks. This document provides both RPMS and BSDX Rules of Behavior.

TABLE OF CONTENTS

1.0   **Introduction**

IHS Clinical Scheduling for Windows (BSDX) package is the Windows Extension of the PIMS Scheduling program. It gives you many appointment management functions included in PIMS Scheduling, but with the added convenience and usability of a Graphic User Interface (GUI). The IHS Clinical Scheduling for Windows (BSDX) package should be used with PIMS Scheduling.

1.1   Using This Manual

If this package was just installed at your site, it must first be setup before you can begin scheduling patients. See Section 6, Setting Up and Administering BSDX, for instructions.

If you need help understanding the screen layout or how to log in or out, see Section 2, Orientation, or Section 3, Getting Started, for more specific instructions.

If the IHS Clinical Scheduling for Windows (BSDX) package was previously installed at your site and it has be upgraded for this version, you can schedule patients as described in Section 4, Managing Patient Appointments, or view and print schedules as described in Section 5, Viewing and Printing.

2.0 Orientation

> **Note**: The screenshots in this manual are from a Windows 2000 environment and may differ from those on your screen

2.1 Definitions

Table 2.1 defines terms used in this document for various areas of the user interface.

Table 2.1: Screen Area Descriptions

Term	Description
Access Block	Access Blocks are color-coded representations of the amount of time allotted for a specific Access Type (or appointment).
Access Types	Access Types refer to the variety of different appointment types available in the RPMS system. Each type of appointment, such as routine physical, dental, walk-in, or other specific appointment type is an Access Type.
Access Groups	Access Groups are categories of Access Types. Assigning Access Types to Access Groups makes it easier to schedule and search for certain types of appointments.
Resources	The term Resources refers to any person or service for which a patient can be scheduled. Resources can be physicians, diagnostic equipment (such as MRI, CT scan, ultrasound, and so on.), or specialty appointment slots, such as physical therapy.
Resource Groups	Resource Groups are categories of Resources that help to organize the variety of Resources available at each location.
Slot	Number of appointments per defined appointment length. For example: If SLOTS = 4 and your clinic (resource) appointment length is 30 minutes, then there are four (4) available appointments for every 30 minutes.

See Setting Up and Administering BSDX on page 43 for information regarding Resource and Access variables.

2.2   Clinic Display Area

The clinic schedule area is composed of date columns and time rowsEach column represents a day and each row represents a time interval. The time intervals can be 10, 15, 20, or 30 minutes. You can change the time interval using the View menu. For more information about Time Scale, see the View Menu.

Access Blocks (areas of the schedule which are available for patient appointments) are indicated by the adjacent appointment times and dates. They may be color-coded to user preference. Different colors represent different Access Types. Position the cursor in such an area and click on the schedule display. The type of clinic access and the number of appointment slots available are visible in a message in the status bar at the bottom of the scheduling window. Clinic Access Types and colors can be defined and changed by the administrator of the scheduling package. (See Setting Up and Administering BSDX on page 43 for more information.)

Patient appointments are displayed on the schedule as white boxes containing a patient name and a note (if applicable), as shown in Figure 2-1.
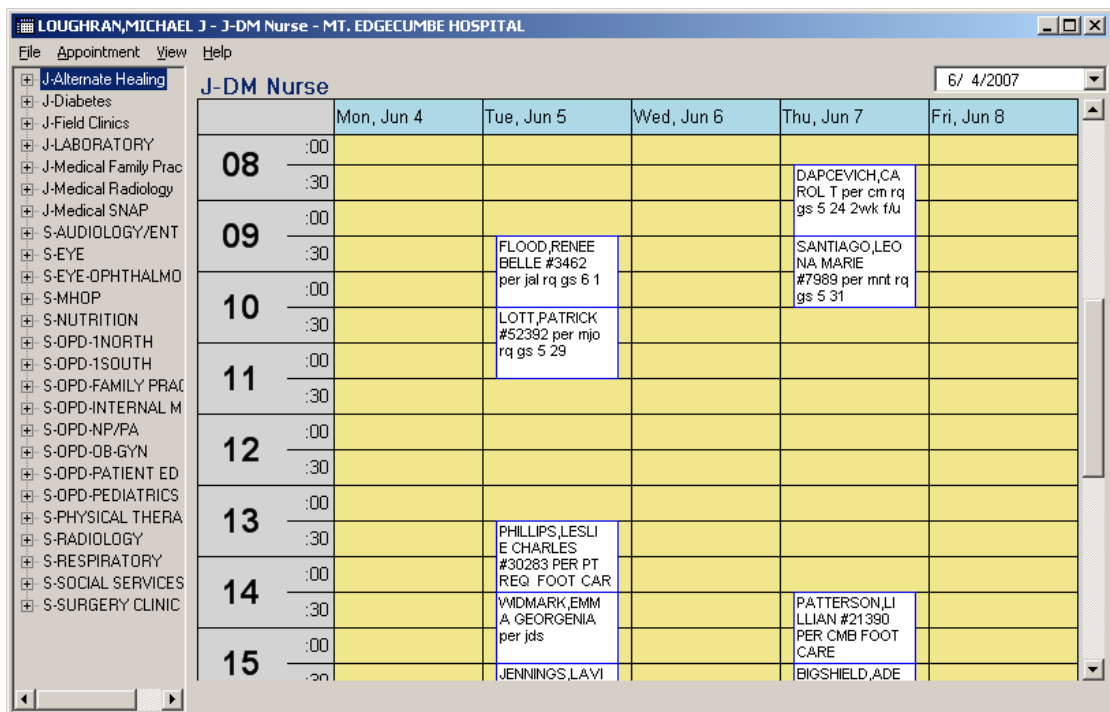
Figure 2-1: Desktop showing patient appointments and multiple clinic schedules

2.3   Basic Screen Layout

The basic 5-day appointment screen is displayed in Figure 2-2. At the far left is a menu tree view showing the Resources organized by Resource Group. In this case, the expanded view of Cardiology group shows three Resources. A Resource can be

linked to an RPMS scheduling clinic so that when a patient has an appointment at that clinic and checks in, a PCC visit is initialized for that clinic.

> **Note**: Equipment Resources such as treadmills or ultrasound cannot be linked to a schedule in RPMS.

The colors on the schedule display correspond to various Access Types, set up for this Resource. The Resources, Resource Groups, Access Types, and colors can be customized to your individual clinic. You can create your own Access Types, Resource Groups using the Scheduling Management window. (See Using the Scheduling Management Window on page 54 for detailed instructions.)
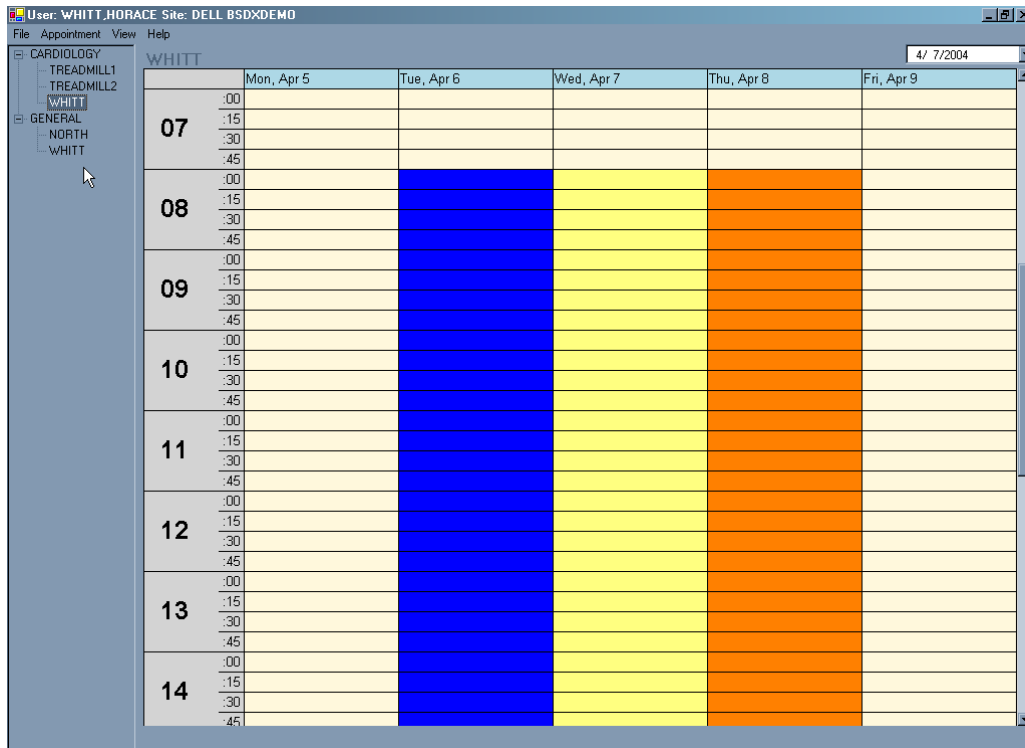
Figure 2-2: Basic Screen Layout

Table 2.2 describes the various items displayed on the basic screen layout.

Table 2.2: Descriptions of screen items

Screen Item	Description
Title Bar	Shows user ID and facility location in the upper left corner of the screen
Menu Bar	Appears below the "Name and location of current user. The available text menus are: File, Appointment, View, and Help.

Screen Item	Description
Resource Group Pane	Appears at the far left of the screen, below the menu bar. Displays the available Resources.
Times	Appears at the left side of the screen. Times are shown by hour and then by segment. They are listed in military time (for example 13:00 equals 1:00PM).
Resource Name	Appears in the upper left side of the screen, immediately above the "Times" column. Displays the name of the Resource currently active in the client window.
Client Window	Area on your screen that shows the work space for an application.
Appointment Date Selector	Appears in the upper right corner of the screen, below the Minimize, Maximize, and Exit buttons. The date selected is the starting date of the appointments currently displayed in the client window. The range of appointments displayed can be 1-day, 5-day, or 7-day.
Minimize, Maximize, and Exit	Appears in the uppermost right corner of the screen. These buttons function just as they do in MS Windows applications.
Scroll Bars, Box, and Arrows	Appears at the far right side and at the bottom of the screen. These buttons function just as they do in MS Windows applications..
Colors	Displays Appointments using colors found in the Client Window area on the Schedule correspond to the various Access Types that can be set up for a particular provider.

2.4   Using the Resource Group Pane

The Resource Group Pane at the left-hand side of the screen lists both Resources and Resource Groups. If there is a plus sign (+), click it to expand the resource group to see all available resources. Click the minus sign (-) to collapse the group.

2.5   Dialog Boxes

Dialog boxes appear when the computer requires input from you or when an error occurs. In this manual, a dialog box is defined as any small box or screen that appears in front of the Scheduling interface and requests your attention or specific

information. Most error dialog boxes ask you to click either **OK** or **Cancel** to acknowledge the error.

2.6   Viewing Long/Wide Reports

When information extends beyond the bottom of the screen, a vertical scroll bar on the right side of the screen becomes active. Click the up and down arrows on the scroll bar to view the previously hidden portions of the report or screen. Likewise, if the screen information extends beyond the right side of the screen, the horizontal scroll bar on the bottom of the screen becomes active. Click the left and right arrows on the scroll bar to view the previously hidden portions of the report or screen.

2.7   Changing the View

You can view the schedule in four modes: patients without appointments (walk-ins), 1-day, 5-day, or 7-day. The 1-day mode gives you maximum detail for a single day schedule. The 5-day and 7-day modes give you a view of five or seven days of the schedule from the selected date. Use the View menu shown in Figure 2-3 to change viewing modes.
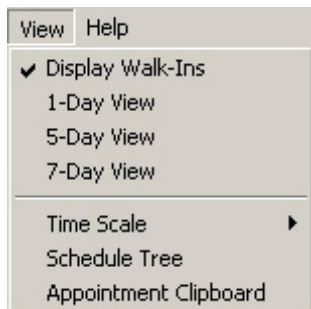
Figure 2-3: View menu

2.7.1   1-Day View
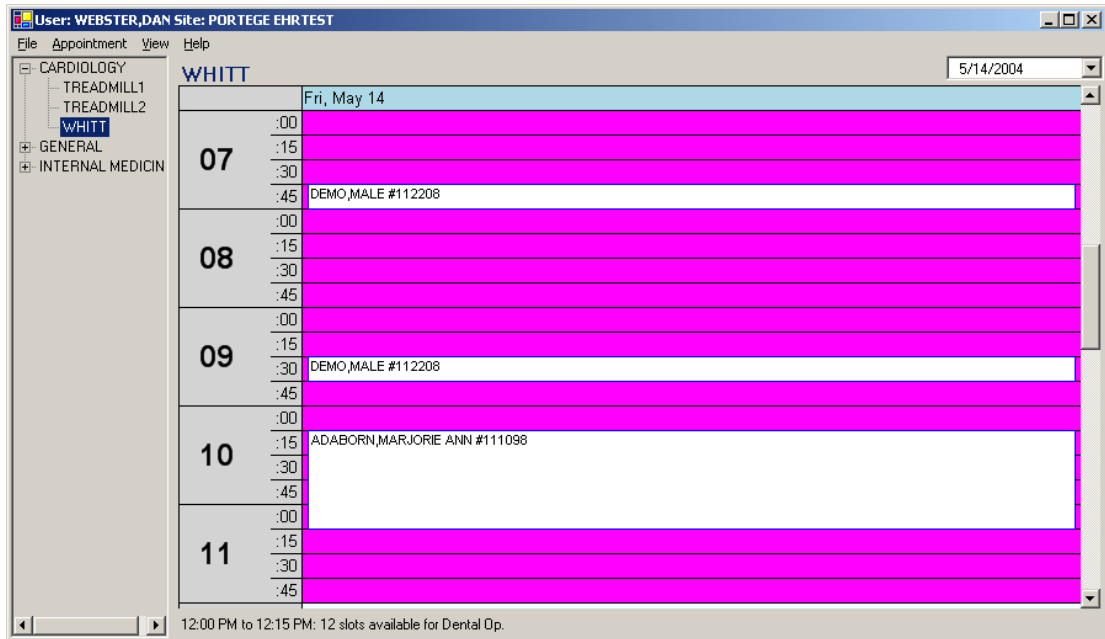
Figure 2-4: Screen showing 1-Day view of schedule

2.7.2   5-Day View
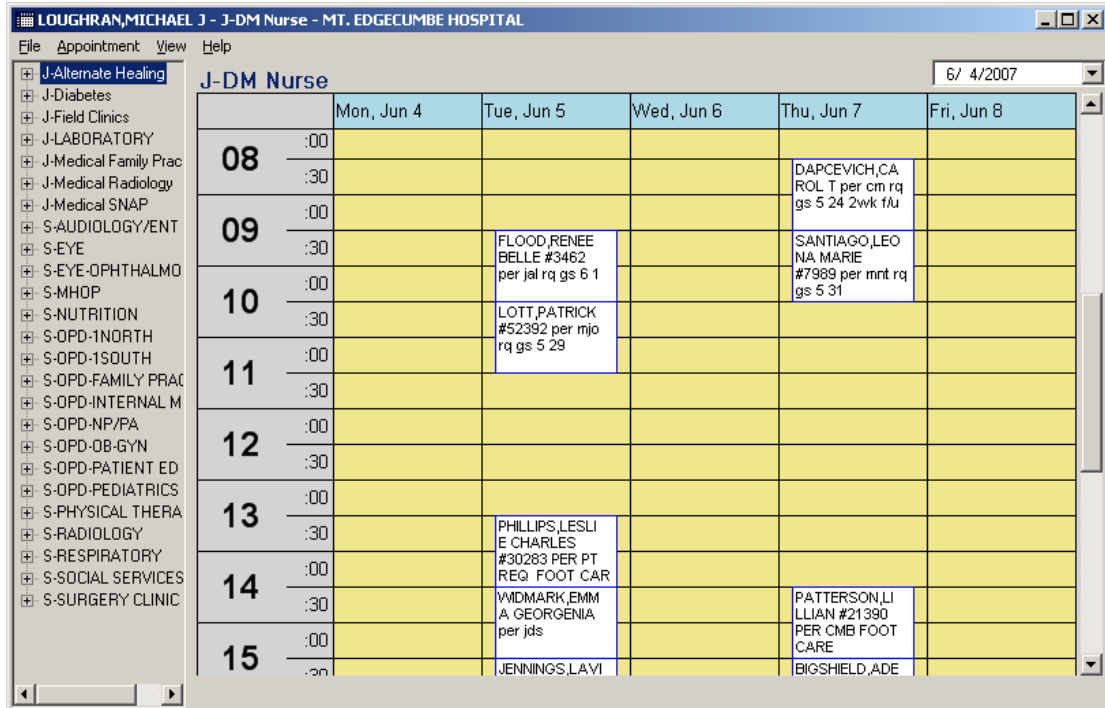
Figure 2-5: Screen showing 5-Day view of schedule

2.7.3   7-Day View
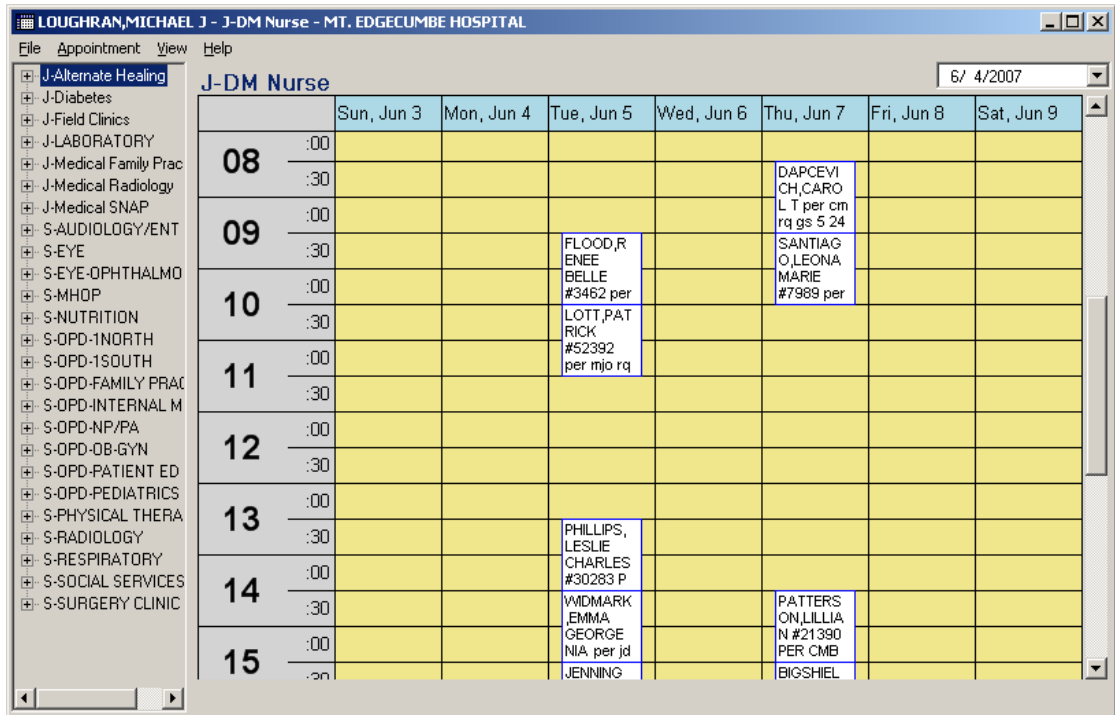
Figure 2-6: Screen showing 7-Day view of schedule

2.8   Appointment Window

The appointment window shows the patient name, time of appointment, and notes. Figure 2-7 shows an appointment made for the 11:00-11:40 time slots for POCO REMUS. The patient selection is directly connected to RPMS. When an appointment is made, the appointment information is also stored in the RPMS scheduling package.
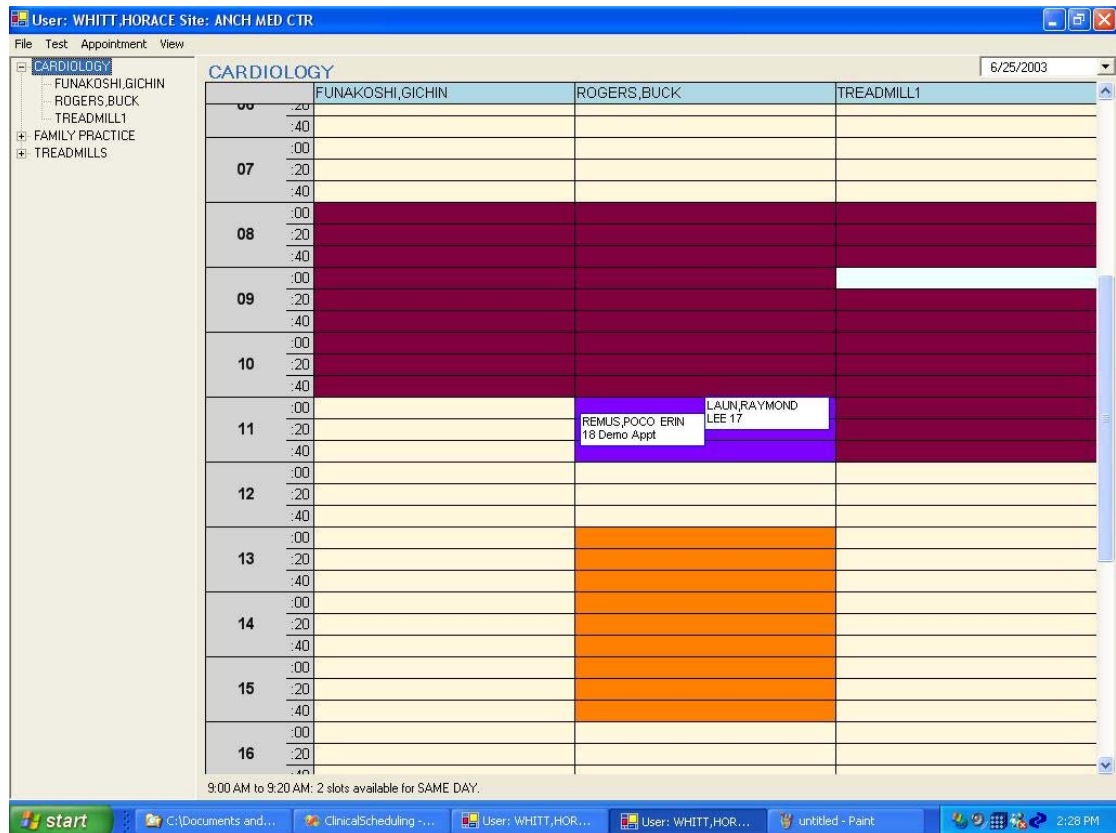
Figure 2-7: Appointment window

2.9   Resource Group View

You can view an entire Resource Group's schedule for one day. Figure 2-8 shows that you can look at an entire group of Resources. In this case, the appointment window for the cardiology group is shown and all three Resource schedules for June 25th are displayed. You can also drag an appointment from one Resource to another or from one time slot to another.

To view a Resource Group's schedule:

1. Right Click a **Resource Group**.

2. Click **Open Schedule**. The Resource Group schedule shown in Figure 2-8 is displayed.
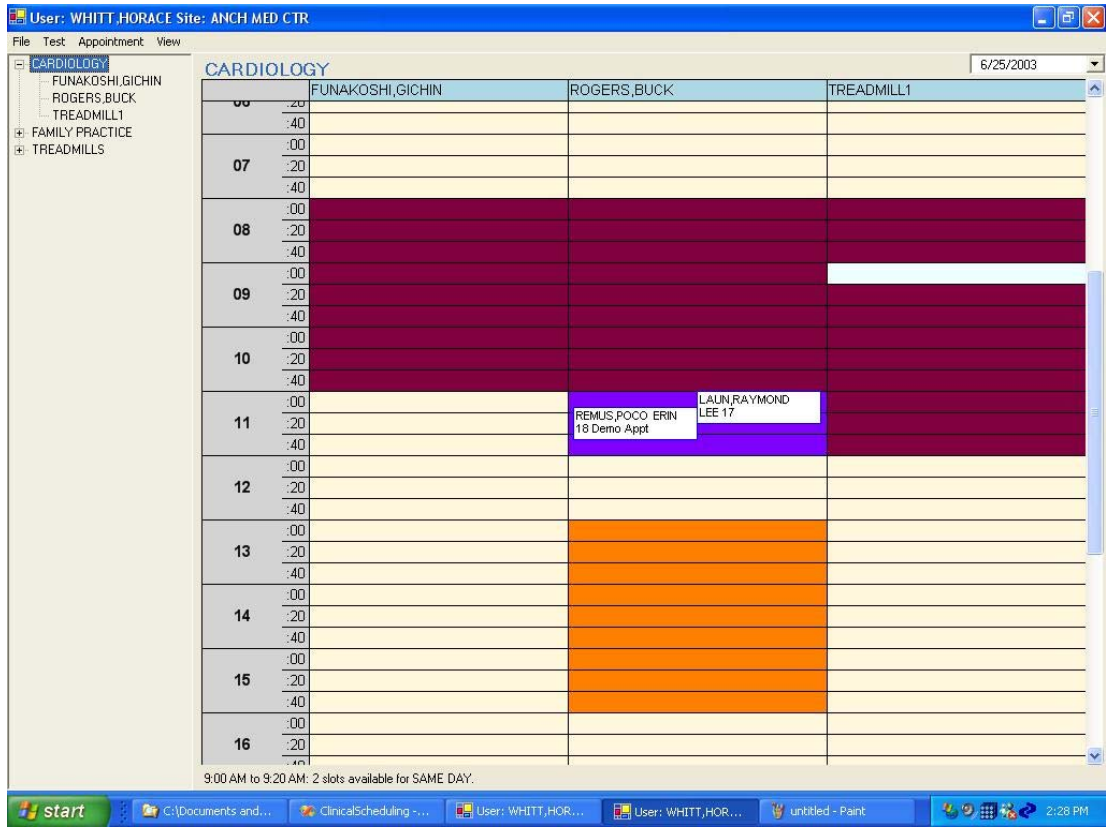
Figure 2-8: Viewing a Resource Group

3.0   Getting Started

This section provides instructions for accessing and exiting the Clinical Scheduling application, as well as an overview of the menus and commands available from the application menu bar.

3.1   Login

This section provides instructions for accessing the Clinical Scheduling application. Make sure you have an IHS user ID and password before you attempt to login.

To start the Scheduling application:

1. Select **IHS Clinical Scheduling** from IHS Clinical Scheduling WX using the Start menu or double-click the IHS Clinical Scheduling desktop icon shown Figure 3-1.
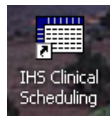
Figure 3-1: Shortcut icon for Scheduling

The splash screen and RPMS login dialog box are displayed as shown in Figure 3-2
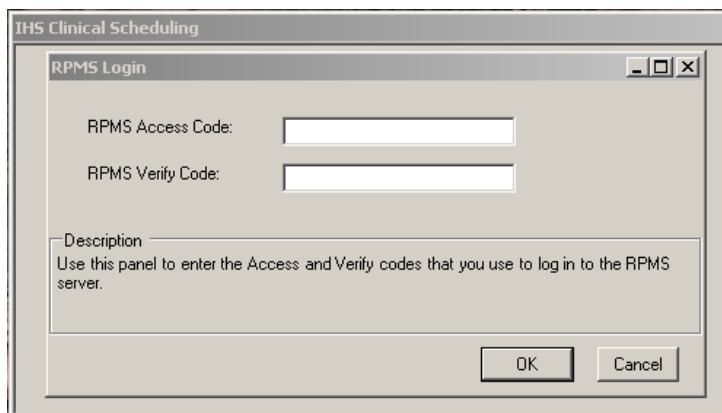
Figure 3-2: RPMS Login dialog box

> **Note**: This application requires a user ID and password. If you do not have them, please contact your supervisor or site administrator.

2. Enter your user ID in the **RPMS Access Cod**e text box.

3. Enter your password in the **RPMS Verify Code** text box.

A window similar to Figure 3-3 opens.
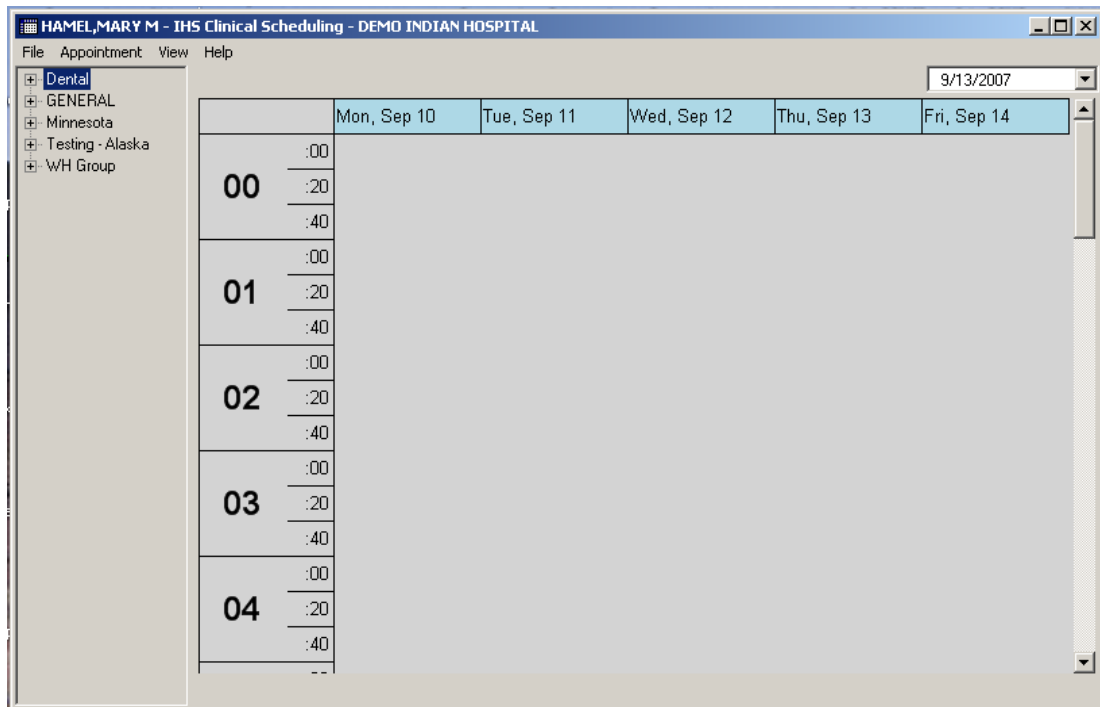
Figure 3-3: Initial view of the Clinical Scheduling application after logging in

You can now add, change, or cancel patient appointments, as necessary. Refer to the specific section of this manual for additional instructions.

3.2   Logout

In addition to logging out of the IHS Clinical Scheduling application during normal daily activity, you may also be instructed to log out by your site administrator when maintenance is required. This section provides instructions for logging out.

To log out of the IHS Clinical Scheduling application:

1. Do one of the following:

    - If you are done scheduling appointments, choose **Close Schedule** from File menu.

    - If you receive a message similar to the one shown in Figure 3-4, click **OK** and quickly complete any tasks on which you are working.
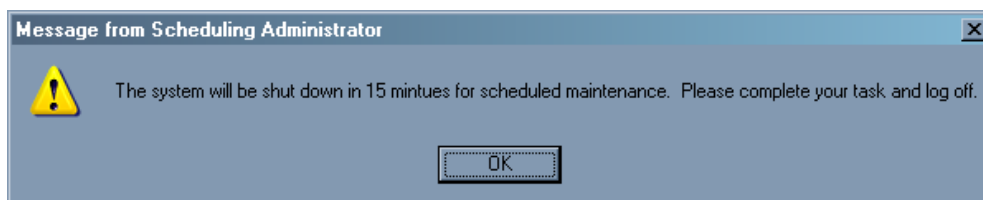
Figure 3-4: Shutdown warning message

- If you receive a message similar to the one shown in Figure 3-5, click **OK**. All users must click **OK** before the system can shutdown. All information entered into the system prior to the shutdown is saved.
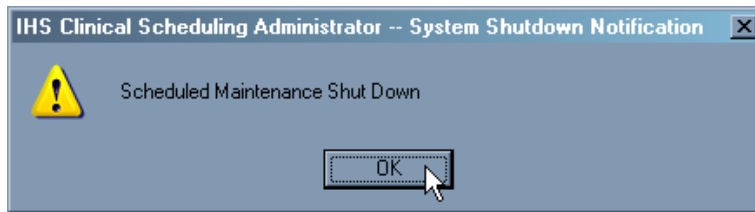
Figure 3-5: System Shutdown notification message

This completes the instructions for logging out of the IHS Clinical Scheduling application.

3.3   Menus and Commands

As with most MS Windows-compatible software, many menu commands duplicate the commands associated with the right-click menu. Either approach, whether through the right-click menu or the menu items, is acceptable. If a menu item is unavailable (or *dimmed*), it means that it cannot be used for the function you are currently performing. When performing specific operations, you must select the Resource, Appointment, or Patient you want before selecting a command.

3.3.1   File Menu and Commands

Figure 3-6 shows the commands on the File menu and the paragraphs that follow describe each command's function.
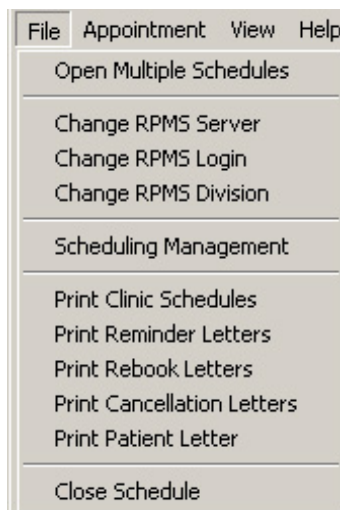
Figure 3-6: File menu

Open Multiple Schedules—Use this command to open schedules for several or all Resources.

To open multiple schedules:

1. Click **Open Multiple Schedule**s on the File menu. The dialog box shown in Figure 3-7 opens.
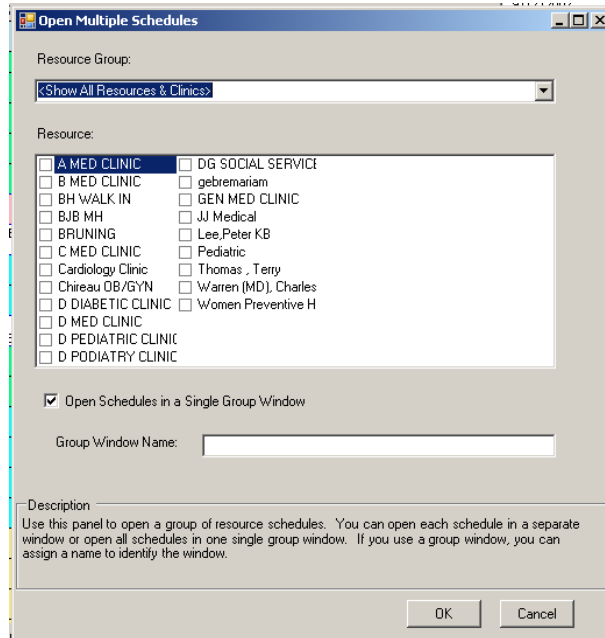
Figure 3-7: Open Multiple Schedules dialog box

2. Select the Resource Group and Resources as necessary and click **OK**. Figure 3-8 provides an example of multiple schedules open on a desktop.
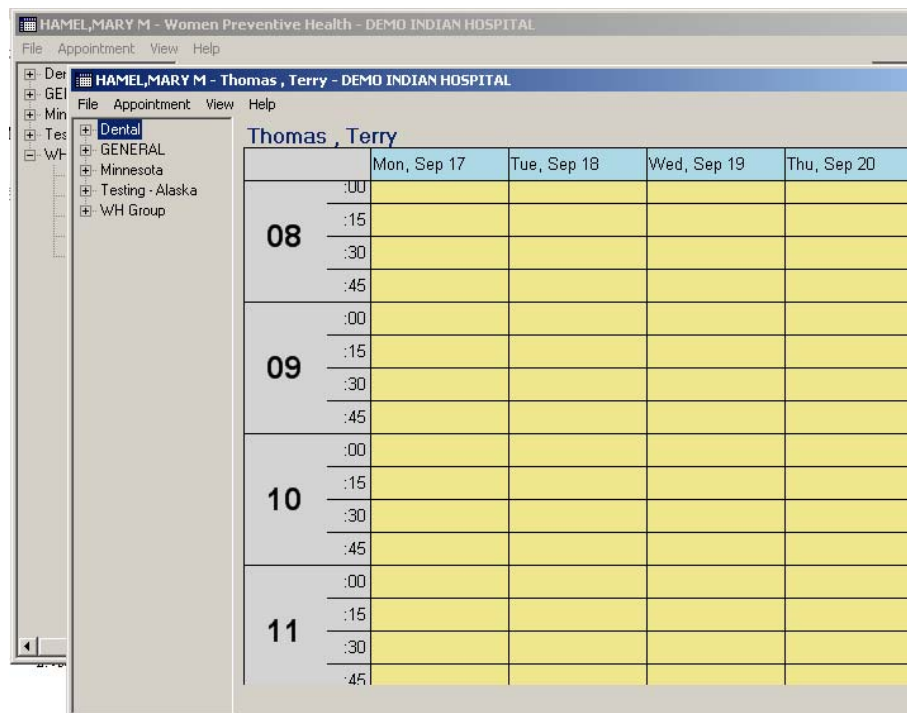
Figure 3-8: Desktop with multiple schedules open

Change RPMS Server—Use this command to change the RPMS server you are using. If schedules are open when you select this command, the system prompts you to confirm that you want to continue. (See Changing the RPMS Server on page 18 for more information.)

Change RPMS Login—Use this command to change the login you use to access the Scheduling program. (See This completes the instructions for logging into the RPMS server..

Changing Your Login on page 18 for more information.)

Change RPMS Division—Use this command to access another division from the Clinical Scheduling program. Click this command to open the dialog box shown in Figure 3-9; select another division; and click **OK** to access another division.
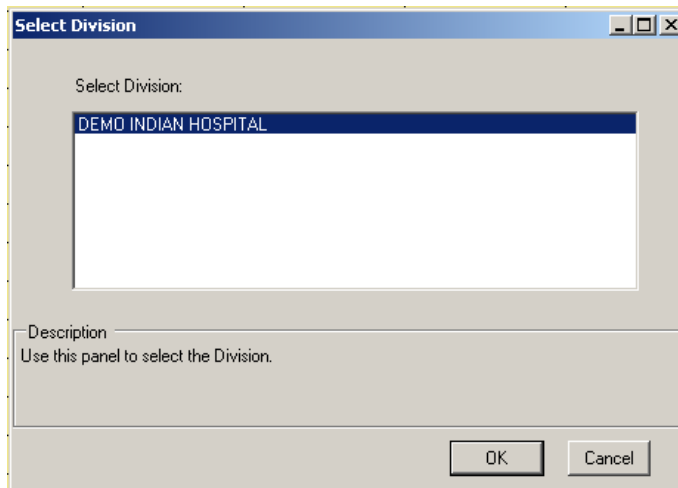
Figure 3-9: Select Division dialog box

Scheduling Management—Use this command to open the Scheduling Management window. (See **Error! Reference source not found.** on page **Error! Bookmark not defined.** for more information.)

Print Clinic Schedules—Use this command to access the Print Clinic Schedules window. (See Clinic Schedules on page 35 for more information.)

Print Reminder Letters—Use this command to access the Print Clinic letters window. (See Reminder, Rebook, and Cancellation Letters on page 37 for more information.)

Print Rebook Letters—Use this command to access the Print Clinic letters window. (See Reminder, Rebook, and Cancellation Letters on page 37 for more information.)

Print Cancellation Letters—Use this command to open the a cancellation letter for a selected patient in the preview window. (See Reminder, Rebook, and Cancellation Letters on page 37 for more information.)

Print Patient Letters—Use this command to view all appointments for a selected patient in the print preview window. (See Patient Appointments on page 41 for more information.)

Close Schedule—Use this command to exit the Clinical Scheduling for Windows package.

3.3.2   Appointment Menu and Commands

Figure 3-10 shows the commands on the Appointment menu and the paragraphs that follow describe each command's function.
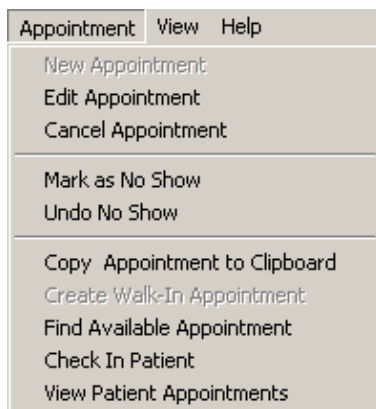
Figure 3-10: Appointment menu

New Appointment—Use this command to create a new appointment. (See Making an Appointment on page 25 for more information.)

Edit Appointment—Use this command to edit an existing appointment. (See Editing Appointment Information on page 26 for more information.)

Cancel Appointment—Use this command to cancel an appointment. (See Deleting Appointments on page 27 for more information)

Mark as No Show—Use this command to indicate that a patient did not show up for an appointment and did not cancel it. (See Marking a No-Show Appointment on page 28)

Undo No Show—Use this command to unmark an appointment as a no show. (See Undoing a No-Show Appointment on page 29)

Copy Appointment to Clipboard—Use this command to copy an appointment to the Appointment Clipboard which makes scheduling duplicate appointments faster. (See Using the Appointment Clipboard on page 30 for more information.)

Create Walk-In Appointment—Use this command to add a same-day appointment for a patient without a scheduled appointment.

Find Available Appointment—Use this command to search the Scheduling system for an appointment that matches your criteria. (See Finding an Available Appointment on page 20 for more information.)

Check In Patient—Use this command to check a patient in when they arrive for an appointment. (See Checking a Patient In on page 31 for more information.)

View Patient Appointments—Use this command to view the appointments for a specific patient. (See Patient Appointments on page 41 for more information.)

3.3.3   View Menu and Commands

Figure 3-11 shows the commands on the View menu and the paragraphs that follow describe each command's function.
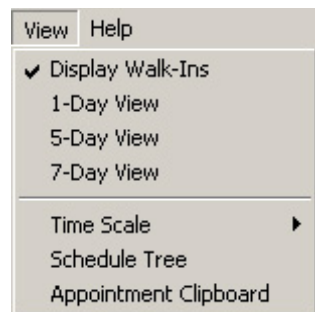
Figure 3-11: View menu

1-Day View—Use this command to view the schedule for a single day. This provides the most detail available. (See Figure 2-4)

5-Day View—Use this command to view the schedule for Monday through Friday. (See Figure 2-5)

7-Day View—Use this command to view the schedule for the entire week. (See Figure 2-6)

Time Scale—This command sets to the amount of time allotted for each appointment. You can customize the appointment interval to fit your clinic's needs as follows:

- 10 minute

- 15 minute

- 20 minute

- 30 minute

Schedule Tree—This command shows or hides the Resource Group pane at the left side of the Scheduling window.

Appointment Clipboard—This command opens the appointment clipboard. (See Using the Appointment Clipboard on page 28 for more information.)

3.4 Changing the RPMS Server

To change the RPMS Server:

1. Select the **Change RPMS Server** command from the File menu shown on Figure 3-6.

2. Click **OK** in response to the prompt shown in Figure 3-12.
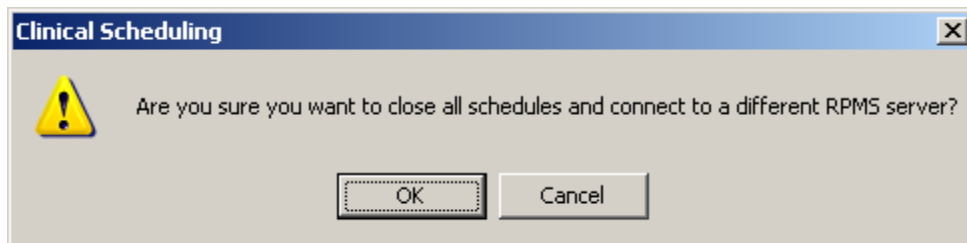
Figure 3-12: Changing the RPMS server confirmation message

3. Type the appropriate RPMS Server Address and Port in the text boxes and click **OK** in the dialog box shown in Figure 3-13.
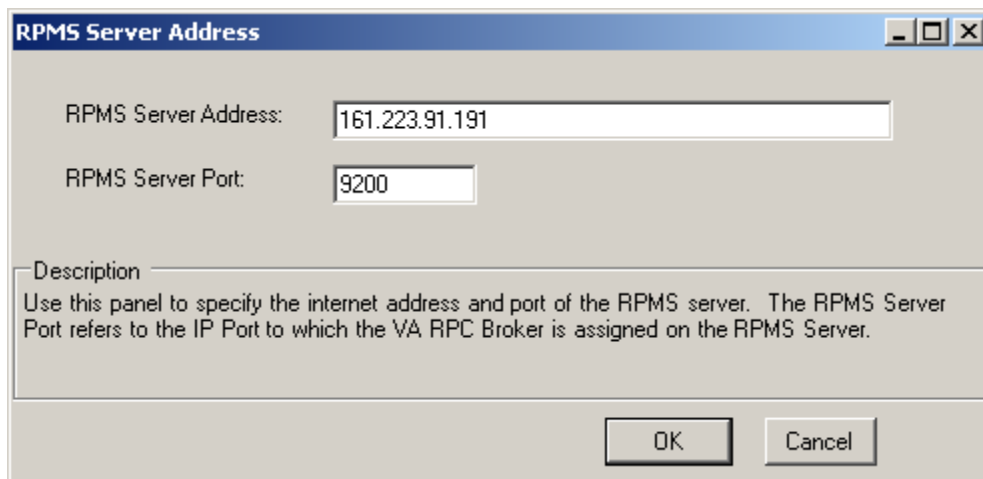
Figure 3-13: Changing the RPMS server

This completes the instructions for logging into the RPMS server..

3.5 Changing Your Login

This section provides instructions for changing a user login.

To change the RPMS Login:

1. Select the **Change RPMS Login** command from the File menu shown on Figure 3-6.

2. Click **OK** in response to the prompt shown in Figure 3-14.
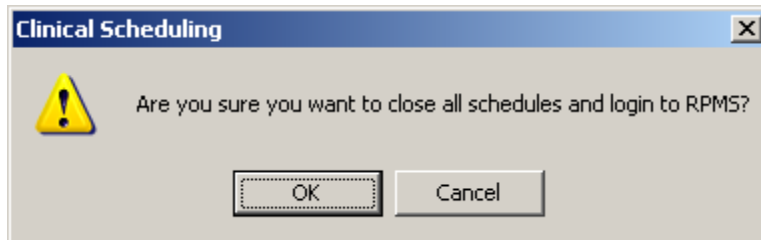
Figure 3-14: Changing the Login

3. Type the appropriate RPMS Access and Verify Codes in the text boxes and click **OK** in the dialog box shown in Figure 3-15.
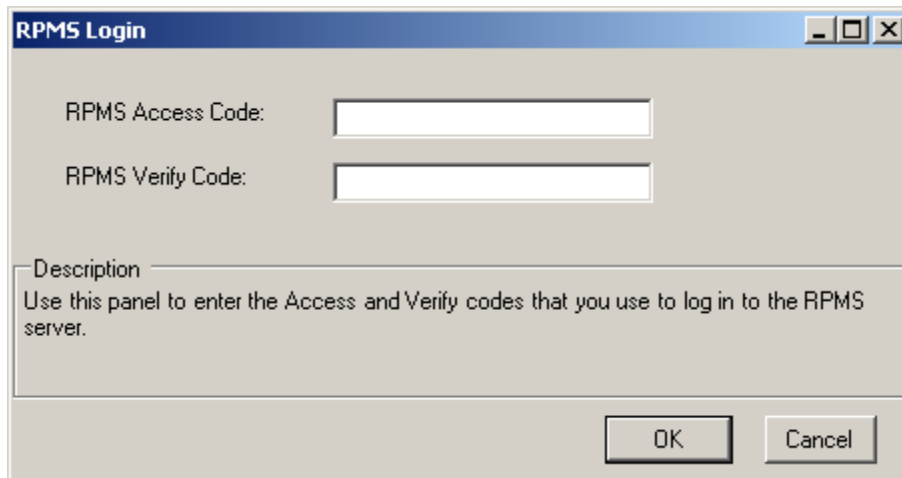
Figure 3-15: Changing the Login

This completes the instructions for changing a user login. The next section provides instructions for scheduling a patient appointment.

4.0   Managing Patient Appointments

This section provides instructions for scheduling, viewing, editing, canceling an appointment for a patient, as well as checking a patient in. It also provides instructions for using the Appointment Clipboard which is useful when scheduling multiple appointments for the same patient.

4.1   Opening or Viewing a Schedule for a Selected Resource

This section provides instructions for opening or viewing an appointment for a patient.

To view the schedule for a selected Resource:

1. Select a Resource Group or individual Resource from the Resource Group pane. Expand and collapse the groups by clicking the plus sign (+) or minus sign (-) next to a group.

2. Do one of the following:

   - Double-click the Resource name and select **Open Schedule** from the File menu.

   - Right-click the Resource name and select **Open Schedule** from the Resource Group pane.

You can also view the schedule of all Resources in a group by selecting the group and then double-clicking the group name.

4.2   Finding an Available Appointment

You can search an entire Resource Group or specific Resource within a group for an available appointment using **Find Available Appointment**.

To find an available appointment for a Resource Group or individual Resource:

1. Click the Resource Group or individual Resource within a group on the Resource Group pane for which you want to find the available appointment.

2. Do one of the following:

   - On the **Appointment Menu**, click **Find Available Appointment**. (See Figure 4-1)

   - Right-click on the Resource in the Resource Group pane, then click **Find Available Appointment**. (See Figure 4-2)
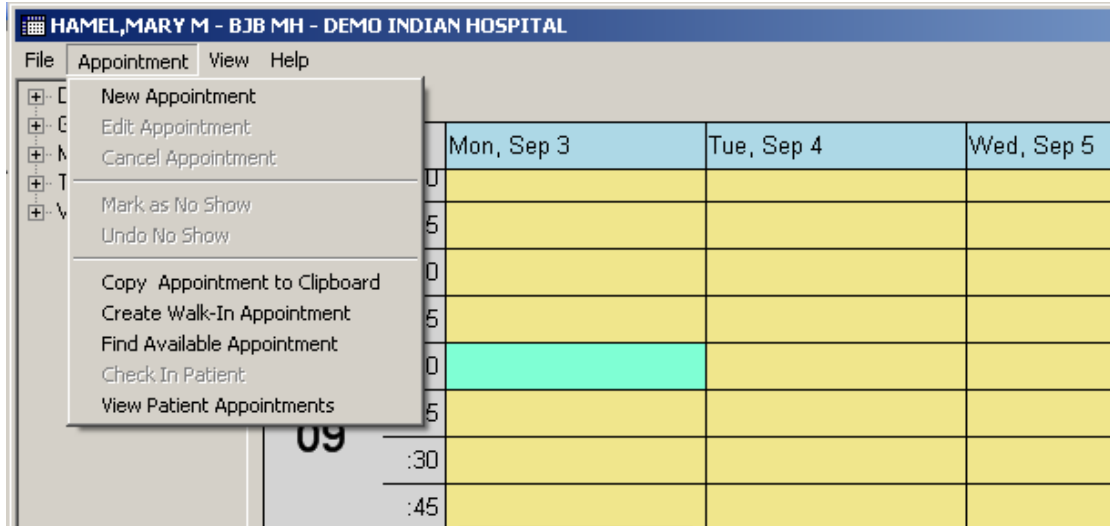
Figure 4-1: Finding an available appointment using Find Available Appointment from the File menu
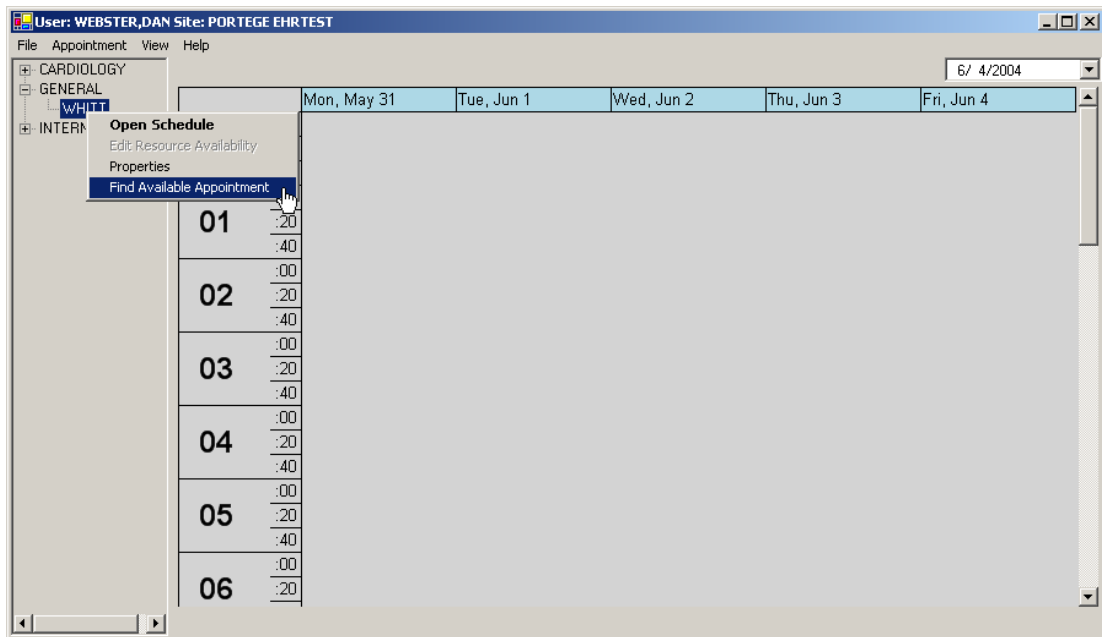
Figure 4-2: Finding an available appointment using right-click

The Appointment Search window is displayed. Figure 4-3 is provided as an example.

Figure 4-3: Search parameters

3. Select the search parameter using the options in the Search Parameters box shown in Figure 4-4 as follows:

Figure 4-4: Available search options

- In the **Date Range** box shown in Figure 4-5, select the range of dates in which you want to find an appointment. Click and drag the cursor from the beginning date to the ending date of the range. The date range must be 14 consecutive days, or less.
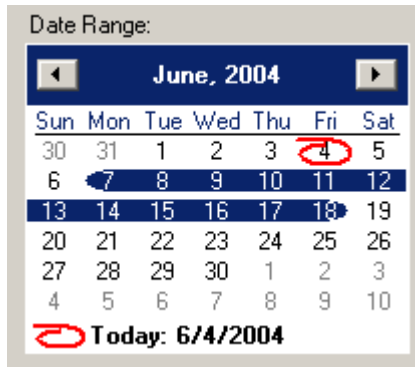
Figure 4-5: Date range box

- In the **Time of Day** box shown in Figure 4-6, click **AM Only**, **PM Only**, or **Both**.
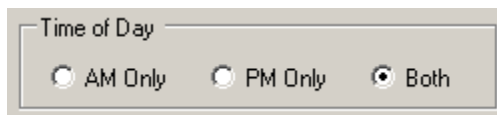
Figure 4-6: Time of day box

- In the **Day of the Week** box shown in Figure 4-7, check the days of the week for which you want to find an appointment time.
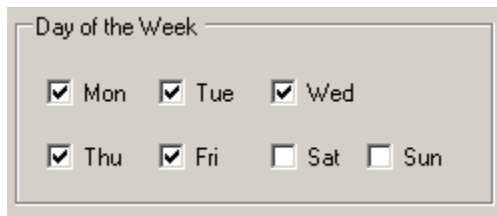
Figure 4-7: Day of the week box

- In the Access Group box shown in Figure 4-8, select the appropriate Access Group from the drop-down list.
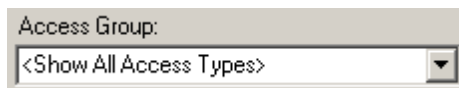
Figure 4-8: Access group box

- In the Access Type box shown in Figure 4-9, check all applicable Access Types for the appointment time you want to find.
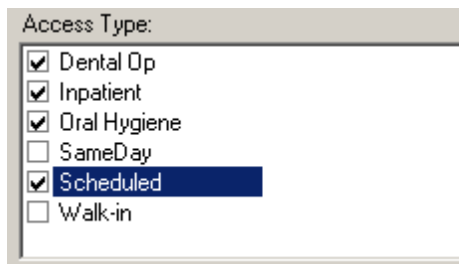
Figure 4-9: Access type box

4. Click **Search** when you have finished selecting your search parameters.

    A list of available appointments is displayed in the Search Result box. Figure 4-10 is provided as an example.
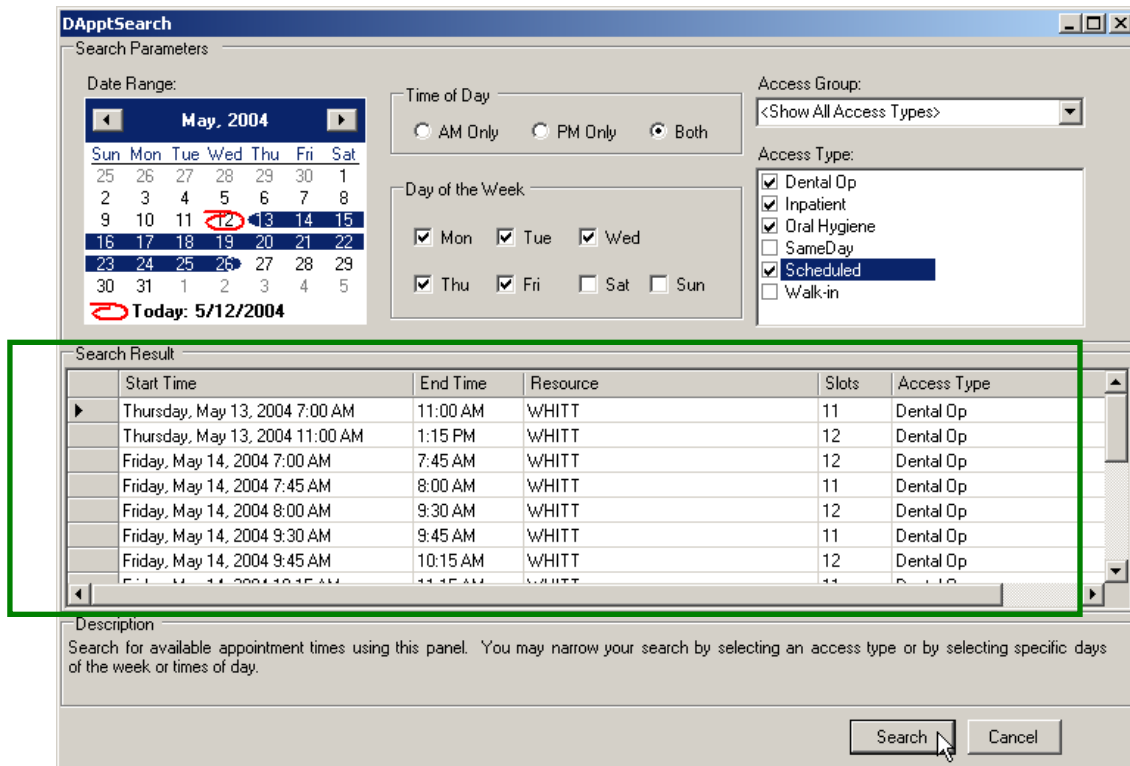
Figure 4-10: Searching for an available appointment (results)

If there are not any appointments available for the parameters you selected, the message shown in Figure 4-11 is displayed.

Figure 4-11: No availability dialog box

You can change the order of the list by clicking any column heading in the search results.

If there are multiple appointments available, scroll through the results list to find the appointment you want. To select an appointment, double-click any where on the row for that appointment. When you select an appointment from the list, the Scheduling window opens to that date. You can now make the appointment. See Making an Appointment on page 25 for instructions.

4.3   Making an Appointment

This section provides instructions for making appointments for patients.

To create a new patient appointment:

1. Click-and-hold the cursor over an area of the schedule that is available for appointments (as indicated by the Access Type color), and then drag the cursor to cover the entire time range needed for the appointment.

2. Do one of the following:

    *   Click **New Appointment** from the Appointment menu.

    *   Right-click on the selected area, then click the **Add Appointment** option.

    The Select Patient window shown in Figure 4-12 is displayed.

3. Select a patient by typing lookup information (name, SSN, DOB, or HRN) in the **Select Patient Search** box. You may enter the first part of the patient's last name, the last 4 digits of the SSN, the entire SSN, HRN, or the DOB in the M-D-YYYY format.

4. Press **Return** or click **Search**. If the system finds only one match, the fields are automatically populated in the Select Patient field. If there is more than one match, a list of available patients is displayed. To select from this list, double-click the patient and then click **OK** to confirm your selection.

> **Note**: You can also recall the last patient you typed in this field by pressing the **Spacebar** and then **Return**.
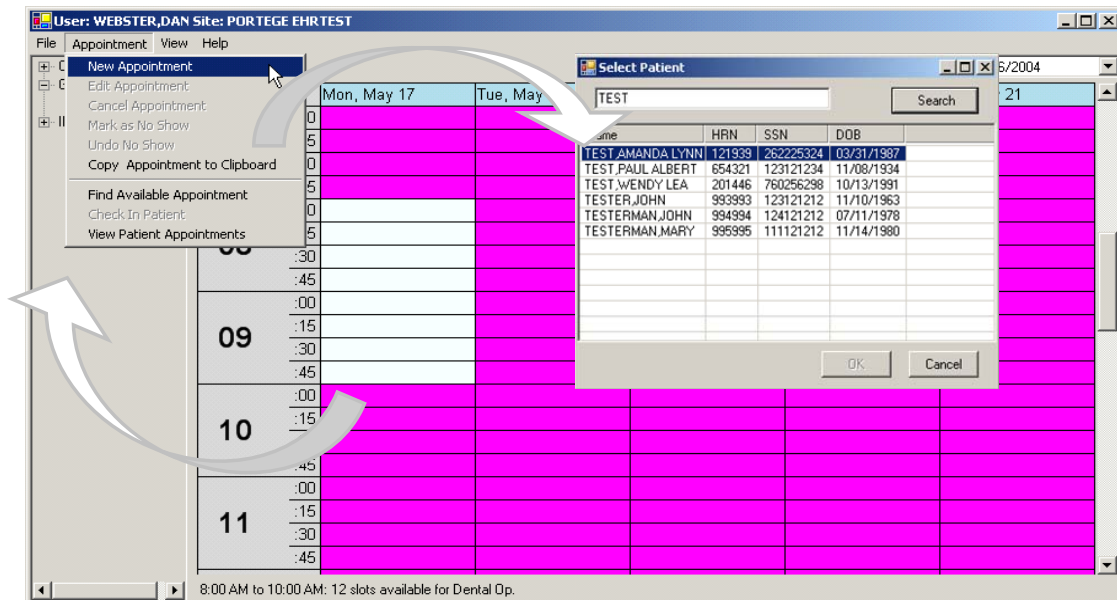
Figure 4-12: Making an appointment (steps 1-4)

The Patient Appointment dialog box shown in Figure 4-13 is displayed.

Figure 4-13: Patient Appointment dialog box

5. Use the **Patient Appointment** dialog box to confirm the patient's contact information and to enter any relevant notes. The patient's identification information shows in the **Patient ID** box, and the appointment information appears in the Appointment box. You can also click the **Contact Information** tab to view the patient's contact information. The Contact Information tab is read-only; any changes made are not saved.

6. Click **OK** to enter this appointment in the schedule.

This completes the instructions for making appointments for patients.

4.4   Editing Appointment Information

This section provides instructions for editing appointments information.

> **Note**: To change a patient's appointment time, see Changing Appointment Times on page 27.

To edit appointment information:

1. Select the appointment that you want to edit.

2. Do one of the following:

    *   Right-click the appointment and then click **Edit Appointment**.

    *   Choose **Edit Appointment** from the Appointment menu.

    The Patient Appointment dialog box shown in Figure 4-13 is displayed.

3. Edit the appointment information as appropriate.

This completes the instructions for editing patient appointments.

4.5   Changing Appointment Times

This section provides instructions for changing the time of a patient appointment.

To change an appointment time:

1.   Click-and hold the appointment box.

2.   Drag the appointment to a new time slot. You can move appointments from one clinic to another by opening both clinic schedules, then clicking and dragging the appointment to the new time or Resource. (Figure 4-14).
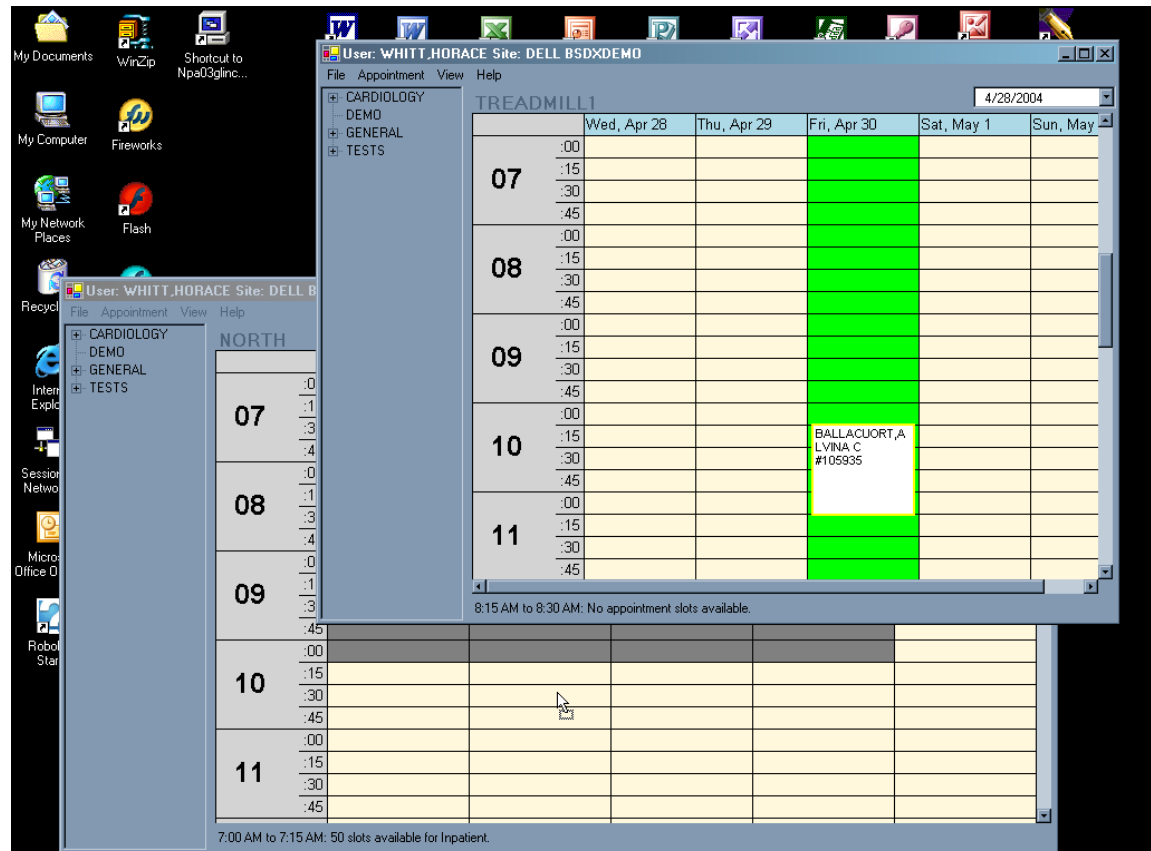
Figure 4-14: Changing an appointment time between two Resources

The dialog box shown in Figure 4-15 is displayed.
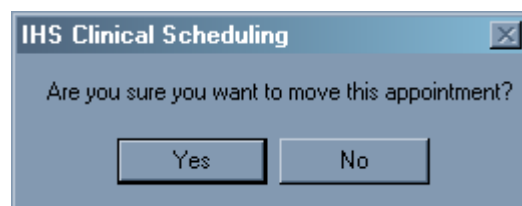
Figure 4-15: IHS Clinical Scheduling dialog box

3.   Click **Yes** to confirm or **No** to cancel the move.

This completes the instructions for changing the time of a patient appointment.

4.6   Deleting Appointments

This section provides instructions for canceling patient appointments.

To cancel an existing appointment:

1. Click the appointment that you want to cancel.

2. Click **Cancel Appointment** in the **Appointment** menu. The Cancel Appointment dialog box shown in Figure 4-16 is displayed.

Figure 4-16: Cancel Appointment dialog box

3. Click the appropriate button to select whether the appointment was cancelled by the clinic or by the patient in the **Appointment Cancelled By** group box.

4. Click the appropriate reason for the cancellation in the **Reason for Cancellation (Select one)** list.

5. Type any comments or remarks as needed in the **Remarks (Optional)** text box.

6. Click **OK** to cancel the appointment or click **Cancel** to keep the appointment and return to the schedule.

This completes the instructions for canceling patient appointments.

4.7   Marking a No-Show Appointment

This section provides instructions for marking a patient as a *No Show* when there was no cancellation.

To mark a patient appointment as a *no show*:

1. Click the appointment for the patient that you want to mark as a no show. Make certain that there is a thick box around the patient name.

2. Choose **Mark as No Show** from the Appointment menu. The dialog box shown in Figure 4-17 is displayed
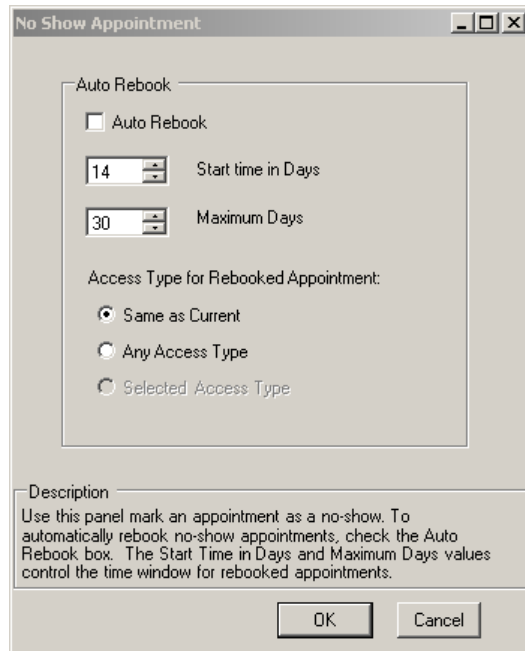
Figure 4-17: No Show Appointment dialog box

3. Do one of the following:

   • To schedule another appointment for this patient, check **Auto Rebook** and change the **Start time in Days** and the **Maximum Days** as necessary using the arrows; choose an Access Type for the Rebooked Appointment as necessary; then click **OK**. The text and background colors change to show this patient as a no show.

   • To dismiss this dialog box without scheduling another appointment, click **Cancel**.

This completes the procedure for marking a no-show appointment.

4.8   Undoing a No-Show Appointment

This section provides instructions for changing a patient appointment from a *No Show* to booked.

To unmark a patient appointment as a *no show*:

1. Click the appointment for the patient that you want to mark as a no show. Make certain that there is a thick box around the patient name.

2. Choose **Undo as No Show** from the Appointment menu. The dialog box shown in Figure 4-17 is displayed. The text and background colors change to show this patient as booked.

This completes the procedure for undoing a no-show appointment.

4.9   Using the Appointment Clipboard

This section provides instructions for using the Appointment Clipboard to set multiple appointments for a patient. This is an excellent tool when you are making several follow-up appointments at one time.

To use the Appointment Clipboard:

1. Click **Appointment Clipboard** on the **View** menu after making an appointment. (See Making an Appointment on page 25 for more information.)

   The Appointment Clipboard pane is displayed on the right side of the screen as shown in Figure 4-18.
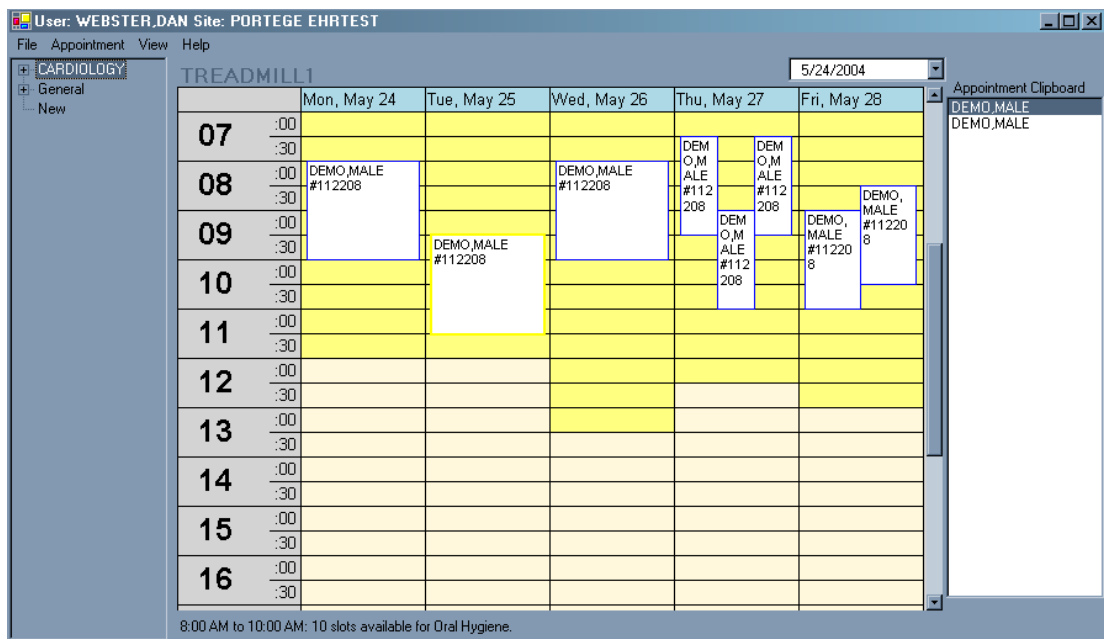
Figure 4-18: Using the appointment clipboard

2. Click-and-drag the patient name you want to the Appointment Clipboard pane.

3. Release the patient name inside the Appointment Clipboard pane.

4. Click the patient name in the Appointment Clipboard pane.

5. Drag it to a new appointment. You can create as many appointments (in as many clinics) for this patient as necessary using this method.

This completes the procedure for marking an appointment using the Appointment Clipboard.

4.9.1   Removing a Patient Name from the Appointment Clipboard

The section provides instructions for removing a patient name from the Appointment Clipboard.

To remove al patient displayed in the Appointment Clipboard:

1. Select patient name you want to remove from the Appointment Clipboard.

2. Right-click and select **Remove Item**. The selected name is removed from the Appointment Clipboard.

This completes the instructions for removing a patient name the Appointment Clipboard.

4.9.2   Clearing the Appointment Clipboard

The section provides instructions for removing all patient names from the Appointment Clipboard.

To remove all patients displayed on the Appointment Clipboard:

1. Move your cursor to the Appointment Clipboard pane.

2. Right-click and select **Clear All**.

This completes the instructions for removing all patient names from the Appointment Clipboard.

4.10   Checking a Patient In

A PCC Visit is created in RPMS for the patient if this option is selected through PIMS. The text in the patient appointment box on the schedule appears green in color after you check in the patient.

To check in a patient when they arrive at the clinic for treatment:

1. Click the patient appointment you want to check in.

2. Do one of the following:

    * Click **Check In Patient** on the **Appointment** menu. The Appointment Check In dialog box shown in Figure 4-19 is displayed.
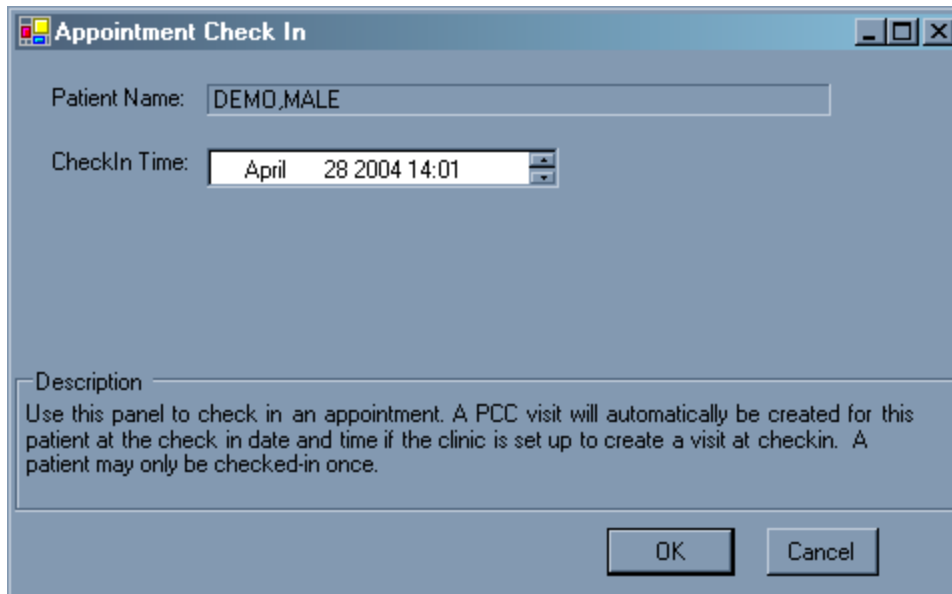
Figure 4-19: Appointment Check In dialog box

- Right-click on the patient appointment, then click **Check In Patient**. The Appointment Check In dialog box shown in Figure 4-19 is displayed

The current time and date are displayed in the **Check In Time** box. To adjust the check-in information, select the component of the time field that you want to change (month, day, year, hour, or minute) and then click the up or down arrows to adjust the value one increment up or down, *or* manually type a new value.

3. Click **OK** to check the patient in, or click **Cancel** to cancel the check-in process

This completes the instructions for checking a patient in.

5.0   Viewing and Printing

This section provides instructions for viewing and printing clinic schedules, patient letters, and patient appointments, as well as describing portions of the window and toolbar buttons related to the window.

5.1   Print Preview

When you select a print command, the Print Preview window opens after making your command selections. This section describes the different buttons in this window. Any button that is not available for selection is dimmed.
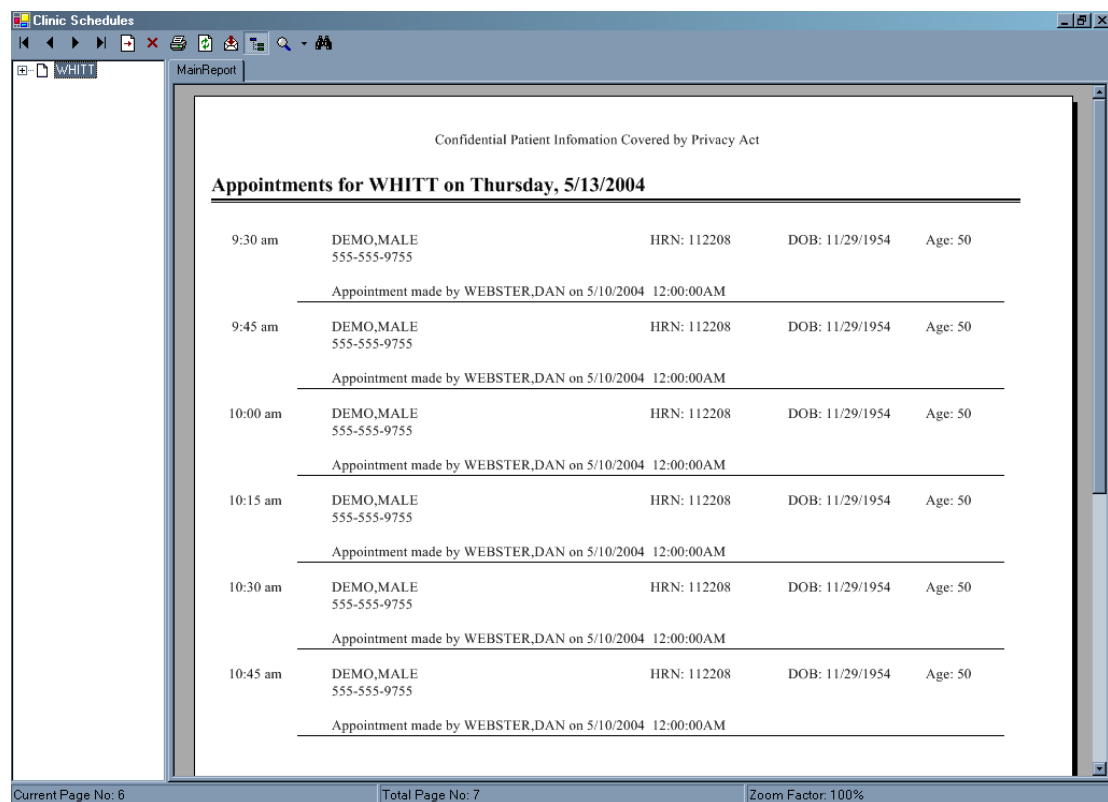
Figure 5-1: Previewing a report

Table 5.1 describes various items and portions of the print preview window shown in Figure 5-1.

Table 5.1: Screen Item Descriptions

Screen Item	Description
Title bar	Shows the name of the current window. Appears in the upper left corner of the screen. In Figure 5-1, *Clinic Schedules* is the current view.

Screen Item	Description
Toolbar	Appears across the top of the screen, below the Title bar. Shows buttons that perform various tasks available from the Print Preview window.
Resource Group Pane	Appears in the left pane of the screen below the tool bar, Allows you to view Resource Groups. Use the plus and minus signs to expand or collapse lists of Resources.
Main Report tab	Appears at the top of the right pane just below the print icon.. Shows a printable view of a schedule or letter
Current Page No.	Appears at the bottom-left of the screen. Shows the page number that is currently displayed. In Figure 5-11, it is page. 6.
Total Page No.	Appears at the bottom of the screen. Displays the total pages for the particular report. In Figure 5-11, it is 7.
Zoom Factor	Found at the bottom-right of the screen. Displays the current zoom factor of the current display. In Figure 5-11, it is 100%.

5.2   Toolbar buttons

Go to First Page: This button takes you to go the first page of a multi-page report.

Go to Previous Page: This button takes you to the previous page of a multi-page report.

Go to next page: This button takes you to the next page of a multi-page report.

Go to last page: This button takes you to the last page of a multi-page report.

Go to Page: This button takes you to a specific page. When you click this button, the Go to Page dialog box opens. To go to the page you want, enter that page number.

Close Current View: This button closes the current view if you have selected a particular view.

Print: This button prints the report. Use the Print dialog box to select the printer you want to use to print the report.

Refresh: This button allows you to update the selected report with the latest information.

Export Report: This button allows you to send the current report to another application or use another format such as Word (.doc), Excel (.xls), Adobe Acrobat (.pdf), or Rich Text (.rtf) formats.

Toggle Tree View: This button allows you to show or conceal the Resource Groups pane.

Zoom: This is the Zoom button. Use it to zoom in (enlarge) or out (shrink) the view of your report by clicking the arrow and selecting from the menu.

Search Text: Use this button to find a word or phrase in the text displayed. When you click the Search Text button, the Search Text dialog box is displayed. Enter the word or phrase in the Find What text box, and click **Find Next**.

5.3   Printing

This section provides instructions for printing clinic schedules, patient letters, and patient appointments, as well as describing portions of the window and toolbar buttons related to the window.

5.3.1   Clinic Schedules

The Print Clinic Schedules command allows you to print a clinic schedule, an entire Resource group, or individual Resources within a given Resource Group.

To print a clinic schedule:

1. Click **Print Clinic Schedules** from the File menu. The Print Clinic Schedules dialog box shown in Figure 5-2 is displayed.
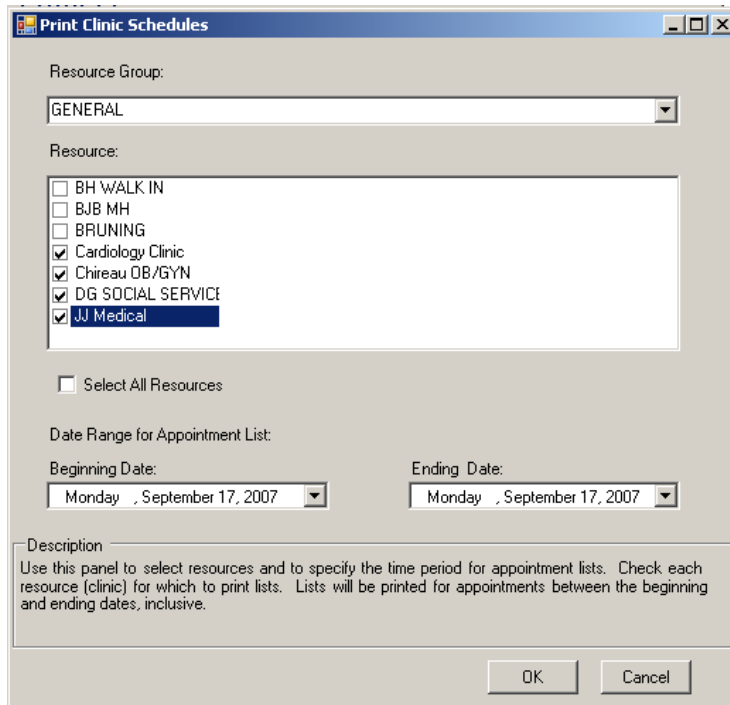
Figure 5-2: Print Clinic Schedules dialog box

2. Select a Resource Group from the **Resource Group** drop-down list.

3. Double click to select each individual resource or check the **Select All Resources** box to print resource schedules.

4. Choose the **Beginning Date** and the **Ending Date** dates using the drop-down list.

5. Click **OK** and the Print Preview window opens showing the clinic schedule. Figure 5-3 is provided as an example.
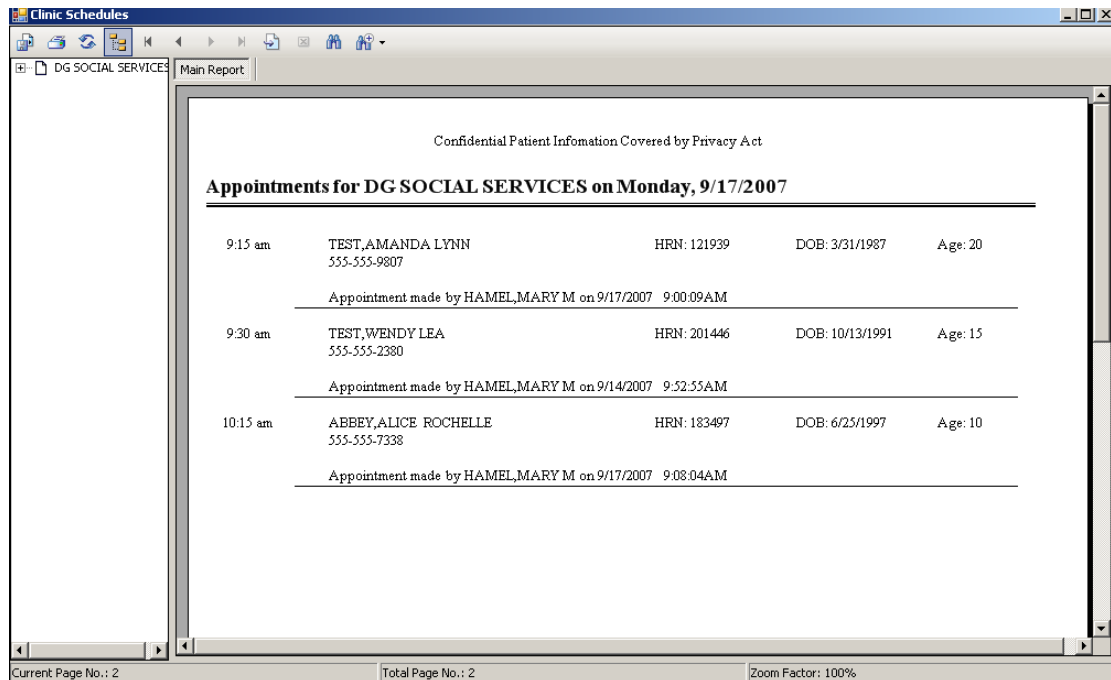
Figure 5-3: Clinic Schedule example

Use the. Toolbar buttons to export, print, and view pages of your schedule as necessary. See Toolbar buttons on page 34 for more information.

This completes the instructions for printing clinic schedules.

5.3.2   Reminder, Rebook, and Cancellation Letters

The Print Clinic Letters command allows you to print various patient letters. The text of the letter can be added or edited as necessary using the dialog boxes shown in the examples in Figure 6-14 and Figure 6-17.

To print reminder, rebook, and cancellation letters:

1. Select **Print Reminder Letters**, **Print Rebook Letters**, or **Print Cancellation Letters** from the File menu. A dialog box similar to the one shown in Figure 5-4 is displayed.
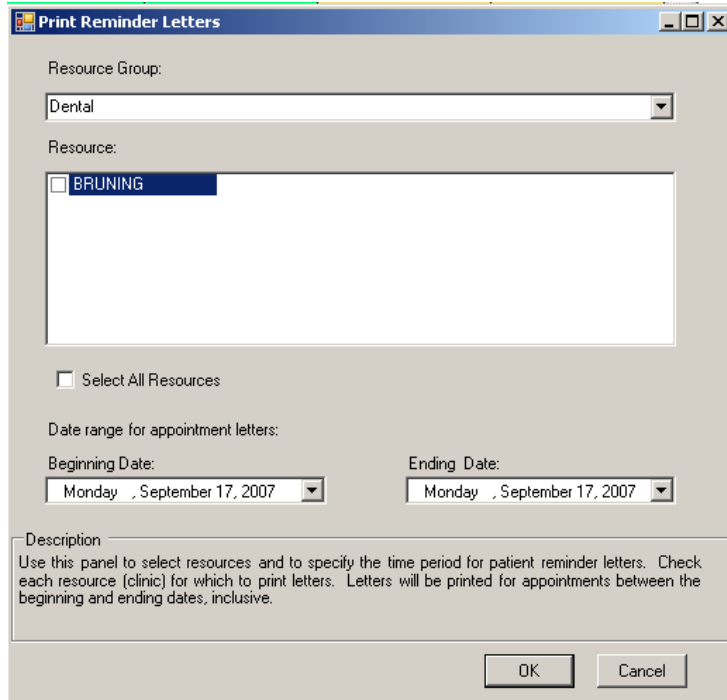
Figure 5-4: Print Reminder Letter dialog box

> **Note**: The Print Rebook Letters and Print Cancellation Letters dialog boxes contain the same choices; only the dialog box names are different.

2. Choose a Resource Group from the list under Resource Group.

3. Double click to select each individual resource or check the **Select All Resources** box to print the selected letter.

4. Choose the **Beginning Date** and the **Ending Date** dates using the drop-down list.

5. Click **OK** and the Print Preview window opens showing the selected letter. Figure 5-5 is provided as an example.
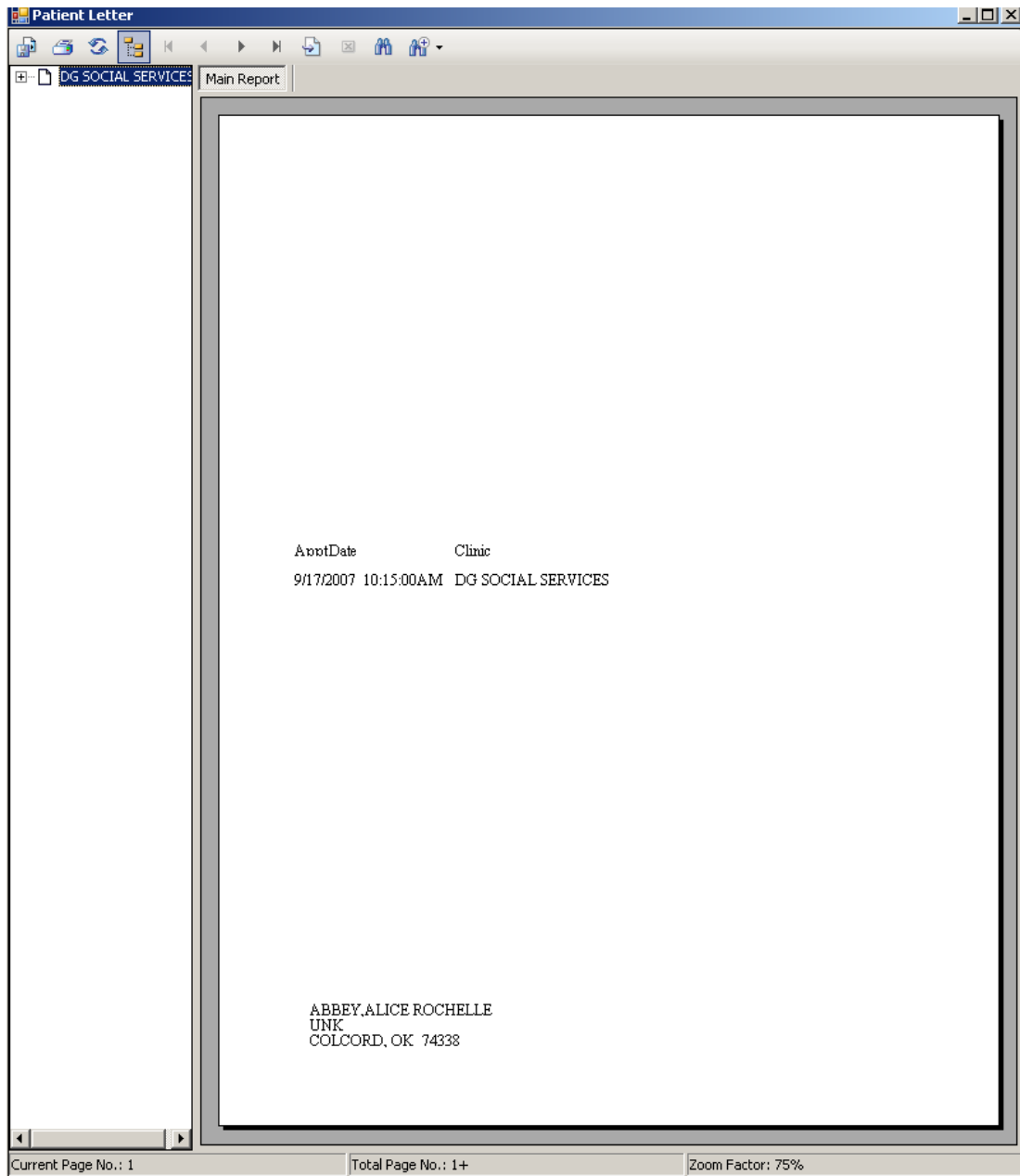
Figure 5-5: Reminder Letter example

Use the Toolbar buttons to export, print, and view pages of your reminder rebook, and cancellation letters as necessary. See Toolbar buttons on page 34 for more information.

This completes the instructions for printing reminder, rebook, and cancellation letters.

5.3.3   Patient Letters

The Print Patient Letters command allows you to view or print all appointments in all clinics for the selected patient.

To print patient letters:

1. Click **Print Patient Letters** on the File menu. The Select Patient dialog box
    shown in Figure 5-6 opens.
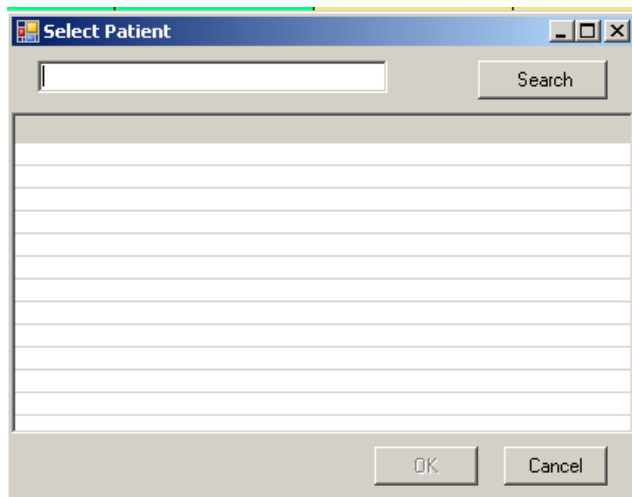
Figure 5-6: Select Patient dialog box

2. Enter the name of the patient in the **Select Patient** text box and click **Search**.

3. Select the patient and click **OK**. The Print Preview window opens.

4. Use the Resource Group Pane to view the list of the clinics in which the patient
    has appointments. Figure 5-7 is provided as an example.
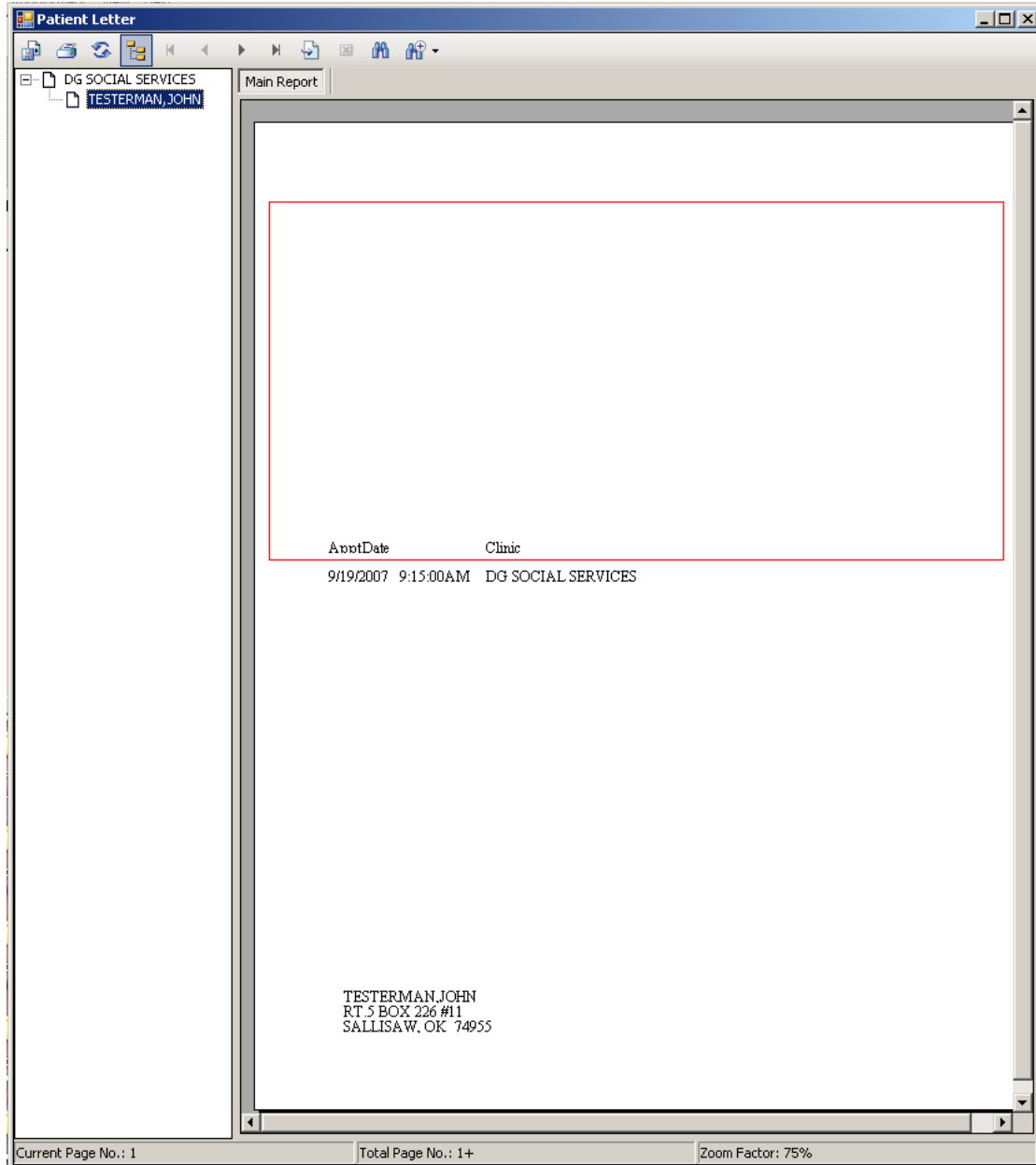
Figure 5-7: Patient Letter window showing all appointments in all clinics for the selected patient

This completes the instructions for printing reminder, rebook, and cancellation letters.

5.3.4   Patient Appointments

The View Patient Appointments command allows you view or print, or view and print all appointments (future or past) for a single patient.

To view a patient's appointments:

1. Click **View Patient Appointment** from the **Appointment** menu The Select Patient dialog box shown in Figure 5-6 is displayed.

2. Select a patient by typing lookup information (name, SSN, DOB, or HRN) in the **Select Patient Search** box. You may enter the first part of the patient's last name, the last 4 digits of the patient SSN, the entire SSN, or the patient's DOB in the form MM/DD/YYYY.

3. Click **Search**. If the system finds one or more matches, the fields in the Select Patient dialog box are automatically populated with the appropriate data for each patient found. To select a patient from this list, double-click the patient name, then click **OK** to confirm your choice.

   Figure 5-8 is provided as an example of the Patient Appointments print preview window.

   Note: You can also recall the last patient you typed in this field by pressing the Spacebar and then the Return key.
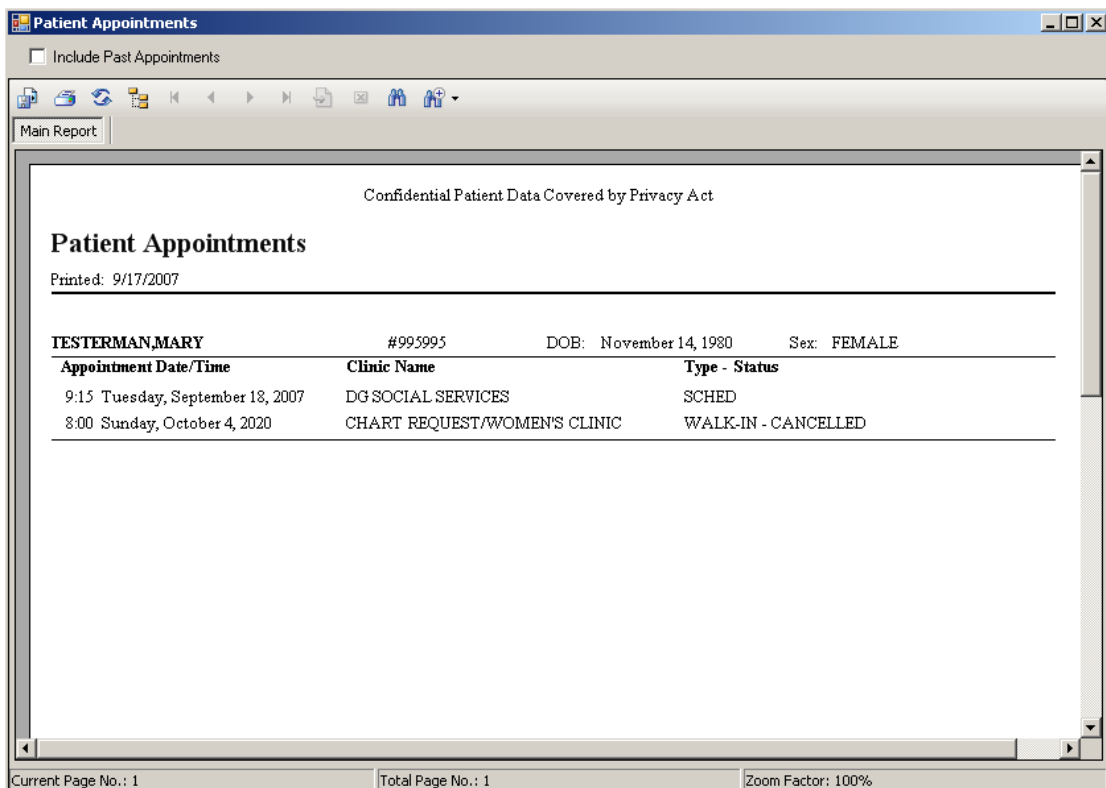
Figure 5-8: Patient Appointments window

This completes the instructions for viewing or printing patient appointments.

6.0   Setting Up and Administering BSDX

This section includes instructions for the following tasks:

- Using the Edit Availability window to set up schedules using Access Blocks, Access Types, and templates. See Using the Edit Availability Window on page 43.

- Using the Scheduling Management window to set up Users and User Roles, Resources, Resource Groups, Access Types, and Access Groups, as well as importing schedules from other RPMS applications and performing administrative tasks such as viewing, communicating, and shutting down workstations. See Using the Scheduling Management Window on page 54.

6.1   Using the Edit Availability Window

This section includes setting up new schedules for Resources. To create a new schedule you must first define Access Blocks using the Edit Availability window as described in the following section.

6.1.1   Accessing the Edit Availability Window

Before you can schedule appointments, you must first design the layout for a schedule. This section provides instructions for creating schedules for a Resource using the Edit Availability window.

> **Note**: To use the Edit Availability window, your (IHS Clinical Scheduling) Resource user profile must include the *Modify Clinic Availability* setting. See your supervisor or IHS Clinical Scheduling administrator to change your profile.

To access the Edit Availability window:

1. Select a Resource from the Resource Group pane that contains the Resource whose availability you want to change.

2. Right-click the Resource you want as shown in Figure 6-1.
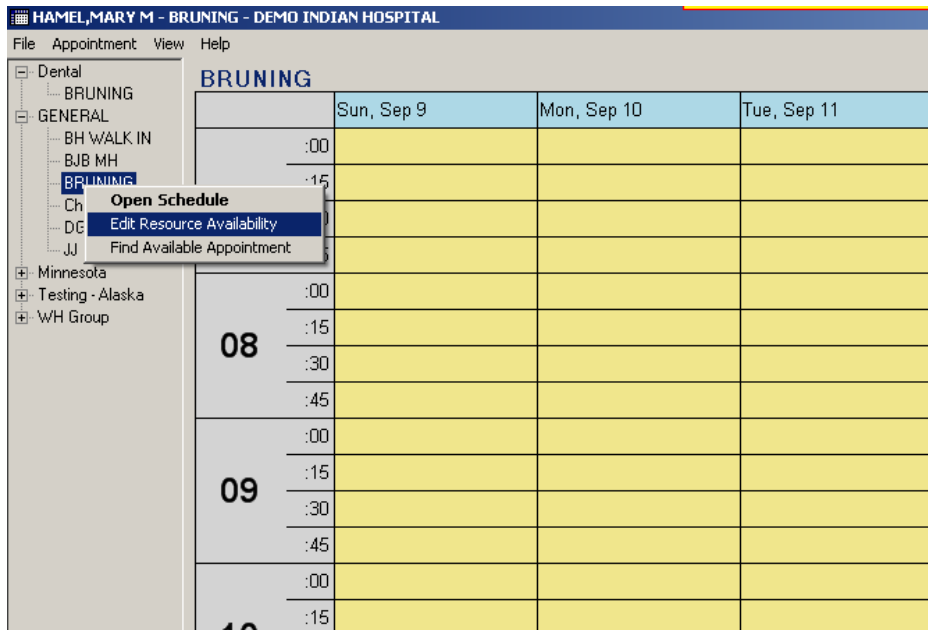
Figure 6-1: Setting up Resource availability

3. Click **Edit Resource Availability** as shown in Figure 6-1.

   The Edit Resource Availability window opens. This window is similar to the regular scheduling window, except it has a blue background. Figure 6-2 is provided as an example.
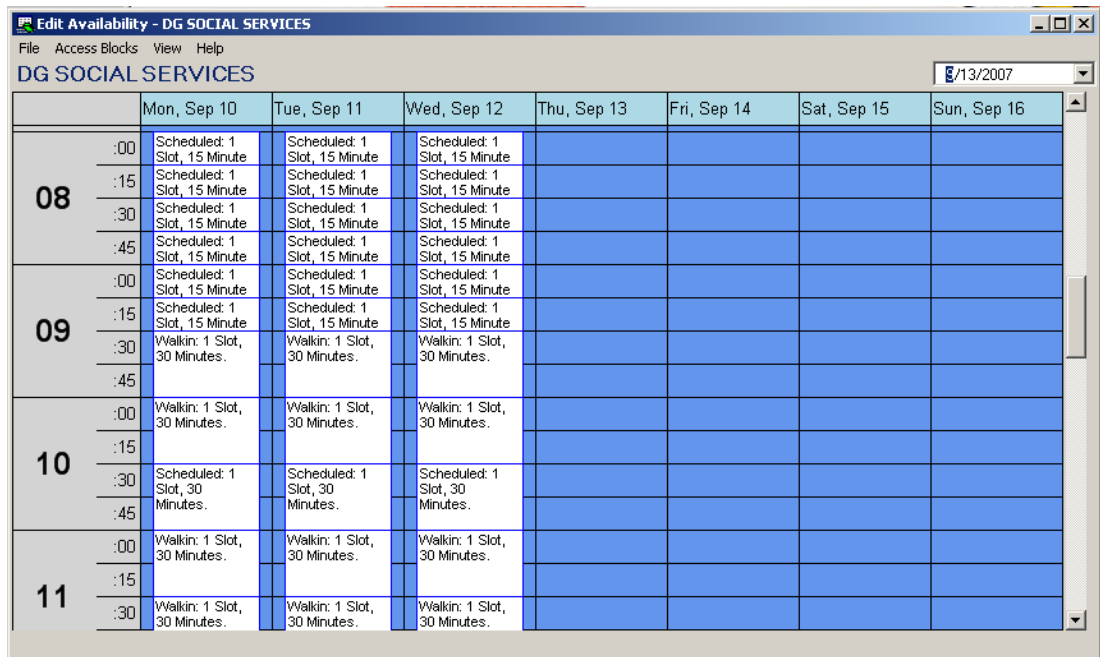
Figure 6-2: Setting up Resource availability

This completes the procedure for accessing the Edit Availability window. The next section provides instructions for using this window.

6.1.2   Menus and Commands

As with most MS Windows applications, many commands can be performed by clicking the command either on the menu bar or by right-clicking. Either method is acceptable. If a command is unavailable (or *dimmed*), it means that it cannot be used for the function you are currently performing. When performing specific operations, you must select an Access Block before selecting a command.

6.1.2.1   File Menu and Commands

Figure 6-3 shows the commands on the File menu and the paragraphs that follow describe each command's function.
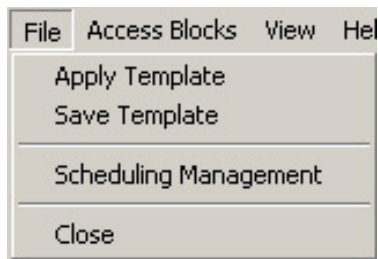
Figure 6-3: File menu

Apply Template—Use this command to apply a saved template to create a schedule for a new Resource. See Applying a Scheduling Template check on page 52 for more information.

Save Template —Use this command to save your template so that you can use it to create a new schedule with the same layout. See Creating a Scheduling Template on page 51 for more information.

Scheduling Management—Use this command to open the Scheduling Management window. (See Using the Scheduling Management Window on page 54 for more information.)

Close—Use this command to exit the Edit Availability window.

This completes the descriptions of the commands on the File menu.

6.1.2.2   Access Blocks Menu and Commands

Figure 6-4 shows the commands on the Access Blocks menu and the paragraphs that follow describe each command's function.

Figure 6-4: Appointment menu

Add New Block—Use this command to add a new Access Block that can be used to schedule appointments

Remove Block —Use this command to remove an Access Block.

Edit Block —Use this command to change the appearance of an Access Block.

This completes the descriptions of the commands on the Access Blocks menu.

6.1.2.3   View Menu and Commands

Figure 6-5 shows the commands on the View menu and the paragraphs that follow describe each command's function.
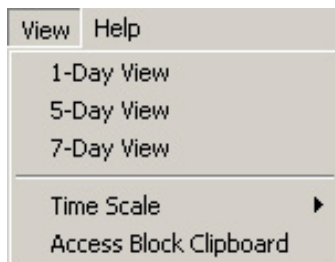
Figure 6-5: View menu

1-Day View—Use this command to create Access Blocks and a schedule for a single day. This provides the most detail available. (See Figure 2-4)

5-Day View—Use this command to create Access Blocks and a schedule for Monday through Friday. (See Figure 2-5)

7-Day View—Use this command to create Access Blocks and a schedule for the entire week. (See Figure 2-6)

Time Scale—This command sets to the amount of time allotted for each appointment time slot You can customize the appointment time slot to fit your clinic's needs as follows:

- 10 minute

- 15 minute

- 20 minute

- 30 minute

Access Block Clipboard—This command opens the Access Block Clipboard. (See Using the Access Block Clipboard on page 50 or more information.) Use the Access Block Clipboard to create multiple copies of Access Blocks with the same hours and appointment time slots.

This completes the descriptions of the commands on the View menu.

6.1.3   Setting up Clinic Availability

Resource availability is set up using Access Blocks. Each Access Block covers a given time range, and contains a defined number of time lots. Each block is reserved for a particular type of Access Group and Access Type. The sections that follow explain how to set up Access Blocks. These options are only available using the Edit Availability window.

6.1.3.1   Adding an Access Block

The following procedure provides instructions for adding an Access Block.

To add an Access Block:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Select the date of the schedule using the drop-down calendar at the top right-hand corner of the window.

3. Click your preferred view (1-day, 5-day, or 7-day) from the **View** menu.

4. Click **Time Scale,** and select a 10, 15, 20, or 30 minute interval.

5. Click-and-drag the pointer to outline the time range of the Access Block. The time range is displayed in the status bar at the bottom of the schedule.

6. Do one of the following:

   - Click **Add New Block** on the **Access Blocks** menu

   - Right-click on the selected block, then click **Add New Access Block**.

   The Access Block dialog box shown in Figure 6-6 is displayed.
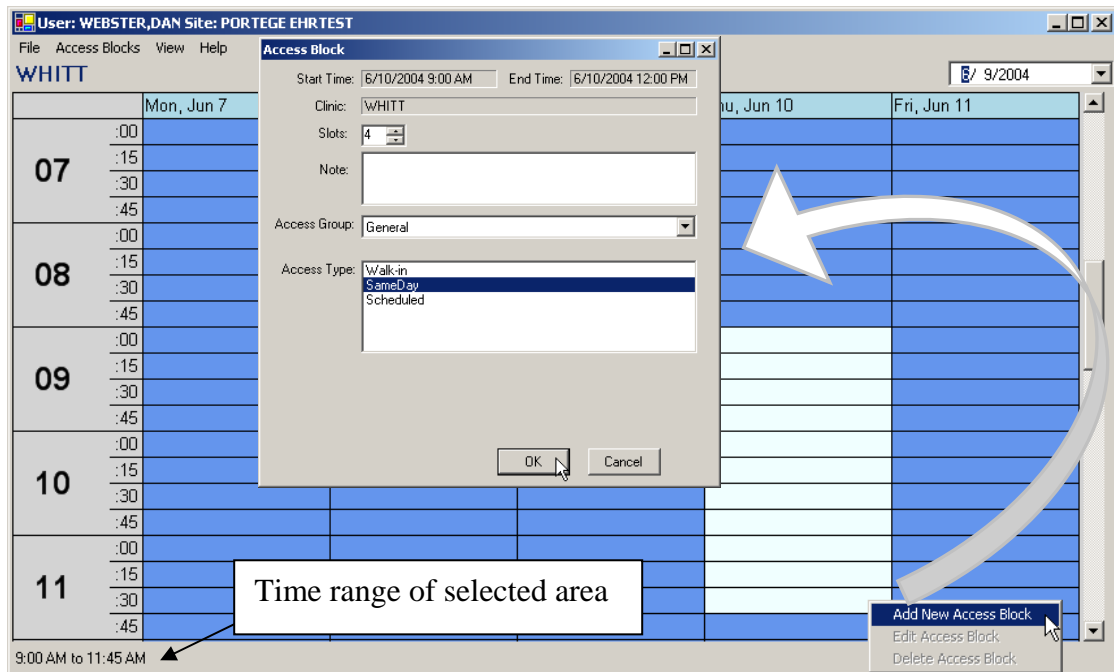
Figure 6-6: Adding an Access Block

7. Select the number of appointments that can be made per defined appointment length in the Access Block from the **Slot** list, the Access Group from the **Access Group** list, and the Access Type from the **Access Type** list. For example, if SLOTS = 4 and your resource has a defined appointment length of 15 minutes, then there are four (4) available appointments for <u>each</u> 15 minute appointment time. Type any notes pertaining to this particular Access Block in the **Note** text box.

8. Click **OK** to save the new Access Block, or click **Cancel** to discard your selections and return to the Edit Availability window.

This completes the procedure for adding an Access Block. You can continue adding Access Blocks or you can exit and close this window. The next section provides instructions for editing Access Blocks.

6.1.3.2   Editing an Access Block

The following procedure provides instructions for editing an Access Block.

To edit an Access Block:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Click an Access Block

3. Do one of the following:

   • Click **Edit Block** on the **Access Blocks** menu.

- Right-click on an Access Block, and then click **Edit Access Block**.

The Access Block dialog box shown in Figure 6-6 is displayed.

4. Edit the following items as necessary:

   - Change the number of appointments per hour in the Access Block using the **Slot** list

   - Change the Access Group using the **Access Group** list

   - Change the Access Type using the **Access Type** list

5. Edit the notes pertaining to this particular Access Block in the **Note** text box, as necessary.

6. Click **OK** to save you changes to the Access Block, or click **Cancel** to discard your changes and return to the Edit Availability window.

This completes the procedure for editing an Access Block. You can continue editing or adding Access Blocks or you can exit and close this window. The next section provides instructions for deleting Access Blocks.

6.1.3.3   Deleting an Access Block

The following procedure provides instructions for removing an Access Block.

To delete an Access Block:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Click an Access Block

3. Do one of the following:

   - Click **Remove Block** on the **Access Blocks** menu.
   - Right-click on an Access Block and then click **Delete Access Block**.

The IHS Clinical Scheduling dialog box shown in Figure 6-7 appears.
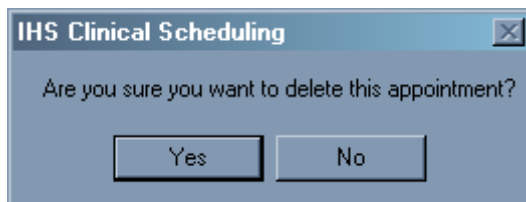
Figure 6-7: IHS Clinical Scheduling confirmation dialog box

4. Click **Yes** to confirm deletion of the Access Block, or click **No** to cancel the deletion.

The Edit Availability window is redisplayed and the selected Access Block is removed.

This completes the procedure for deleting an Access Block. You can continue adding, editing, and deleting Access Blocks or you can exit and close this window. The next section provides instructions for using the Access Block Clipboard.

6.1.4   Using the Access Block Clipboard

The Access Block Clipboard allows you to duplicate Access Block by copying and pasting Access Blocks temporarily stored on the Access Block Clipboard. This feature is useful if you are adding several identical Access Blocks. You can store an unlimited number of Access Blocks in the clipboard. However, the Access Block Clipboard is cleared when you exit the Edit Availability window.

To use the Access Block Clipboard:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Click **Access Block Clipboard** on the **View** menu. Figure 6-8 shows the Access Block Clipboard.

3. Add a new Access Block as described in Adding an Access Block on page 47 or click an existing Access Block.

4. Drag the Access Block to the Access Block Clipboard. This does not move the Access Block; instead it copies the Access Block information to the clipboard.

   You can now create a new Access Block on any area on the schedule by clicking and dragging the information to the new day and time. There is no limit to how many times you can copy the Access Block to the schedule.
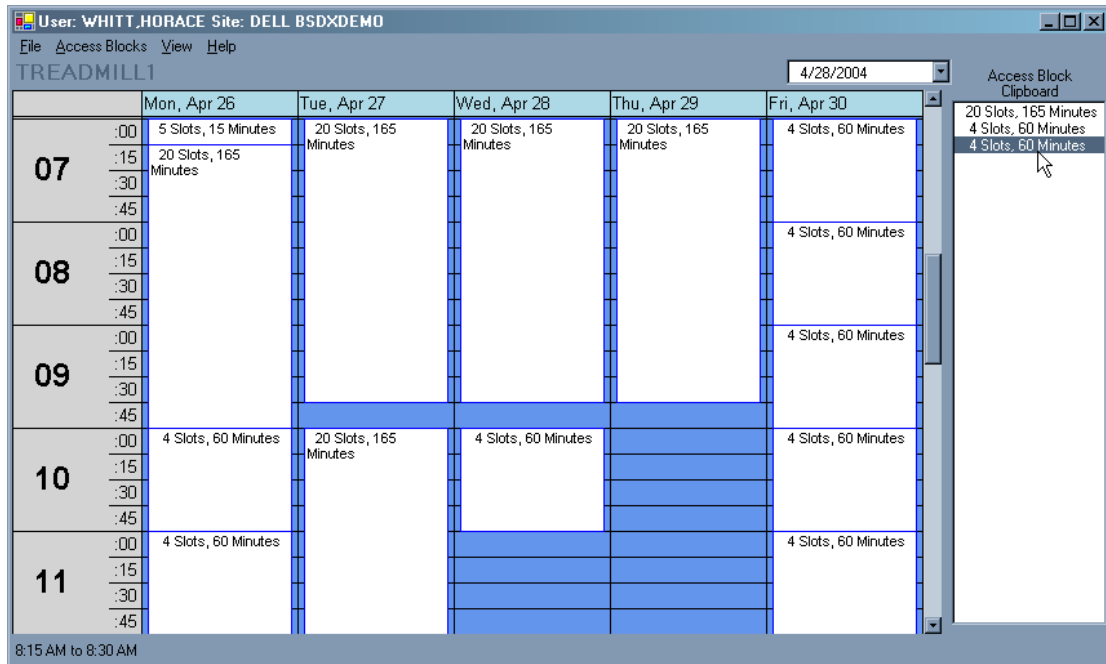
Figure 6-8: Using the Access Block clipboard

This completes the procedure for using the Access Block Clipboard. The next section provides instructions for creating and using Access Block Templates for quickly creating a schedule for a Resource.

6.1.5   Using Templates to Set Up Resources

Access Block templates are an excellent way to help set up a Resource appointment schedule. Templates can be for one, five, or seven days. Once created, you can apply them to the schedule repeatedly. Schedule Template files have a *.bsdxa* file extension (for example: pedstemplate.bsdxa for a pediatric clinic schedule or 15mintemplate.bsdxa for Resources that use a 15-minute appointment slot).

6.1.5.1   Creating a Scheduling Template

This section provides instructions for creating a Scheduling Template.

> **Note**: The template you create whether it be 1, 5, or 7 days can only be applied for the same time interval (that is you can only apply a 1 day template to a 1 day schedule).

To create a template:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Create a full 1, 5, or 7 day schedule for a particular Resource using Access Blocks as described in Setting up Clinic Availability on page 47.

3. Click **Save Template** on the **File** menu. The Save As dialog box shown in Figure 6-9 opens.
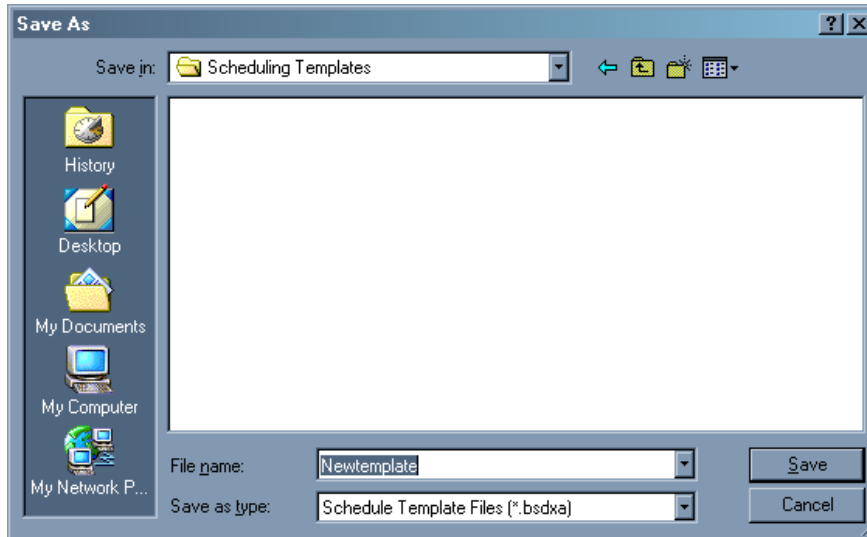
Figure 6-9: Save As dialog box

4. Type file name of the template in the **File Name** field. Use a descriptive name for the template so that you can have multiple templates that are easy to identify by name (such as pedtemplate.bsdxa or 15mintemplate.bsdxa).

5. Select a location for your templates using the **Save In** drop-down list. You may want to create a separate folder to store your templates, such as BSDX Templates.

6. Click **Save** to save your template or **Cancel** to exit without saving the template.

This completes the instructions for creating a Scheduling Template. The next section provides instructions for setting up a schedule for a Resource using a Scheduling Template.

6.1.5.2   Applying a Scheduling Template check

This section provides instructions for setting up a schedule for a Resource using a Scheduling Template.

To apply a scheduling template:

1. Open the Edit Availability window by right-clicking a Resource and choosing **Edit Resource Availability**, as shown in Figure 6-1.

2. Select a **1- Day View**, **5- Day View**, or **7-Day View** from the View menu.

3. Click **Apply Template** on the **File** menu.

The Apply Access Template dialog box shown in Figure 6-10 opens.
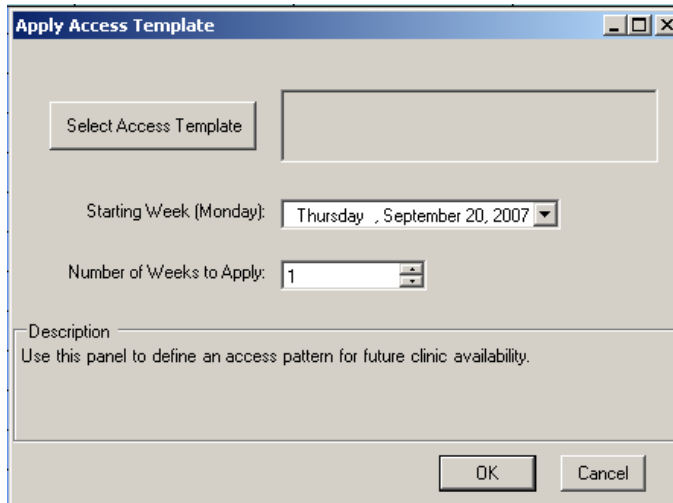
Figure 6-10: Apply Access Template dialog box

4. Click **Select Access Template**. The Open dialog box is displayed

5. Locate folder that contains the template and choose the template you want.

> **Note**: A template has a *.bsdxa* file extension.

6. Click **Open** to apply the template or **Cancel** to cancel your action.

7. Choose the week for which you want to create a schedule by selecting a week from the **Starting Week (Monday)** list.

8. Choose the number of weeks for which you want to create schedules from the **Number of Weeks to Apply** list.

9. Click **OK** to apply this template to your schedule or **Cancel** to return to the Edit Availability window without creating a new schedule.

> **Note**: You cannot load a template if there are already Access Blocks defined for the particular week you are applying the template.

You can edit individual Access Blocks using the Edit Access Block feature (see Editing an Access Block on page 48 for more information).

6.2   Using the Scheduling Management Window

This section provides instructions for setup and administration tasks using the Scheduling Management window. Using this window, the Clinical Scheduling administrator can set up users and their privileges as well as schedules for the availability of doctors, procedures, clinics and the layout and appearance of the overall schedule.

The procedures described in this section require the manager key. See your site administrator to determine or change your security keys. The Scheduling Management window shown in Figure 6-11 includes these tabs:

- Resources and Users
- Access Groups
- Resource Groups
- Copy Appointments.
- Access Types
- Workstations

With the exception of the Copy Appointments tab, each tab contains a table. You can expand the first column of the table by clicking the plus sign (+). These rows are called *group list rows*.
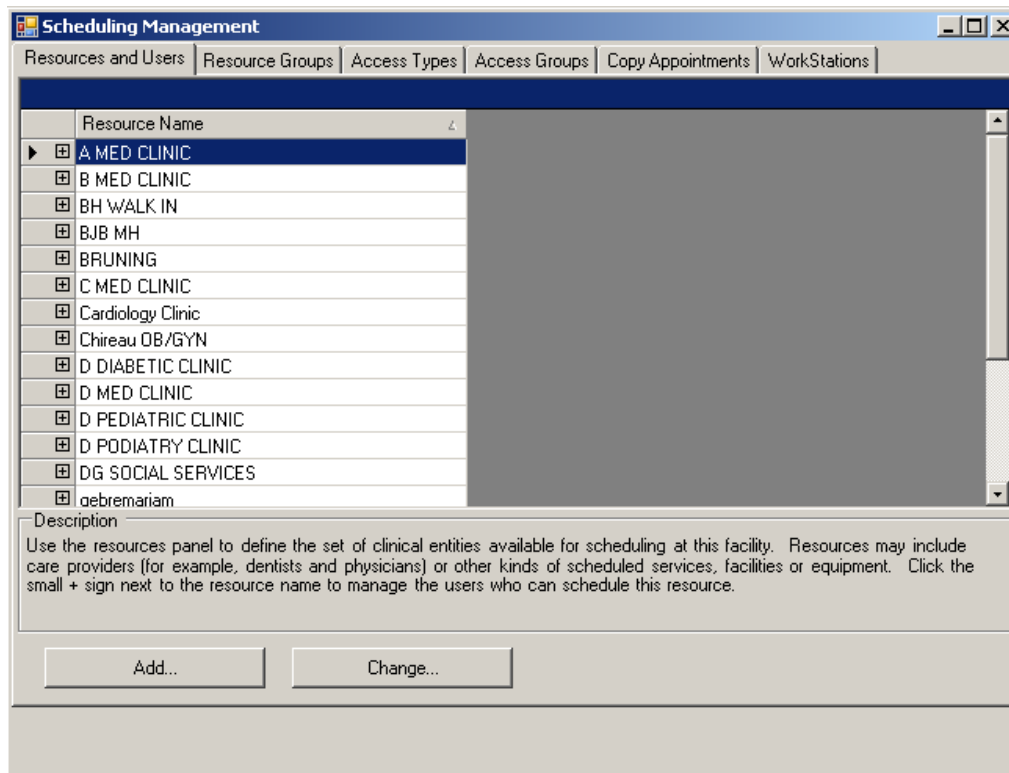
Figure 6-11: Scheduling management window

When you click the (+) sign, the sub list is displayed in blue. Click the sub list to view the options for that list. When you select a sub list, you can return to the group list by clicking the left-arrow button located in the top right hand side of the table

view. You can also click **Show/Hide** (shown in Figure 6-12) for the current set of sub lists.

Figure 6-12: Show/Hide button

6.2.1 Defining Resources and Users

The Resources and Users tab allows you to define the set of Resources available for scheduling at your facility. Resources can include providers (such as Dentists and Physicians) or other kinds of scheduled services, facilities, or equipment. The *ResourceUser* list, shown in Figure 6-13, allows you to manage the users who can schedule the Resource. To define the parameters of an RPMS Resource, you must log into RPMS and use the PIMS Scheduling Supervisor's menus.
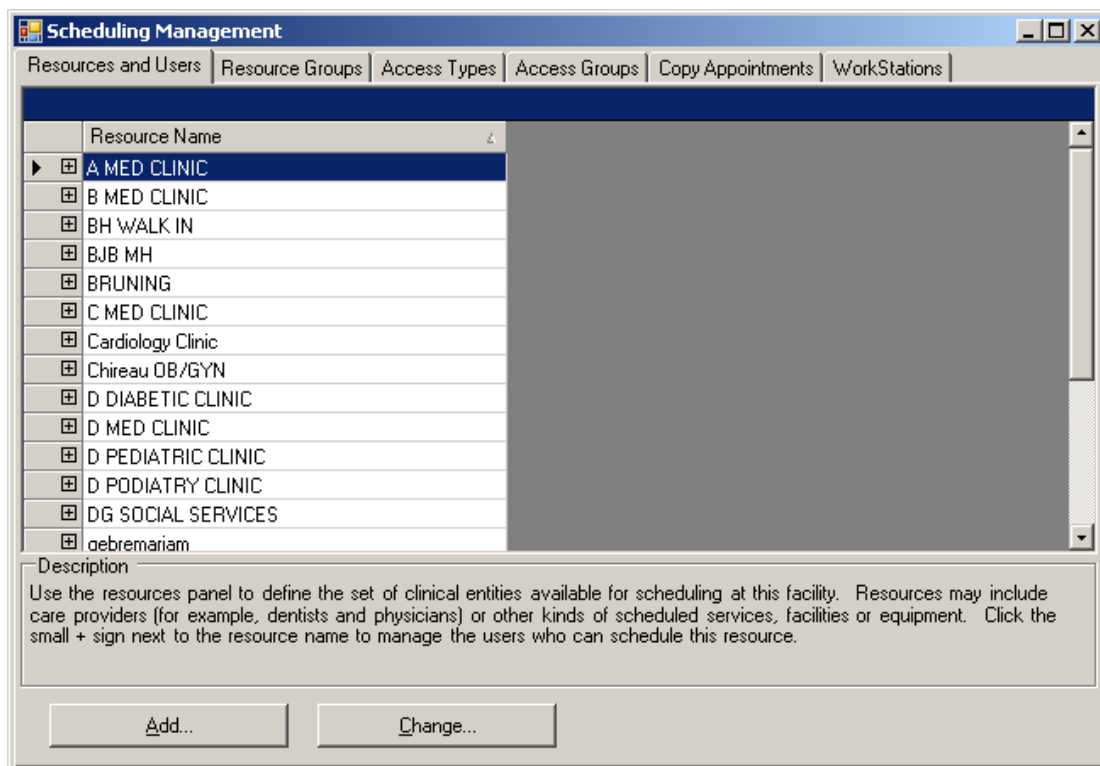
Figure 6-13: Resources and users tab in scheduling management window

6.2.1.1 Adding a Resource

The following procedure provides instructions for adding a new resource.

To add a new Resource:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resources and Users** tab in the Scheduling Management window.

3. Click **Add**. The Add New Scheduling Resource dialog box shown in Figure 6-14 opens.

Figure 6-14: Add New Scheduling Resource dialog box

4. Type the name of the Resource in the **Resource Name** text box.

5. Select the default time scale for appointments from the **Time Scale** drop-down list. This time interval controls the time interval between appointments.

6. Select the clinic, as needed, that you want this Resource linked to from the **RPMS Clinic** drop-down list in the **RPMS Clini**c field.

7. Select **Reminder Letter**, **Rebook Letter**, or **Cancellation Letter**; and add the text as necessary. Figure 6-15 provided an example of letter text.
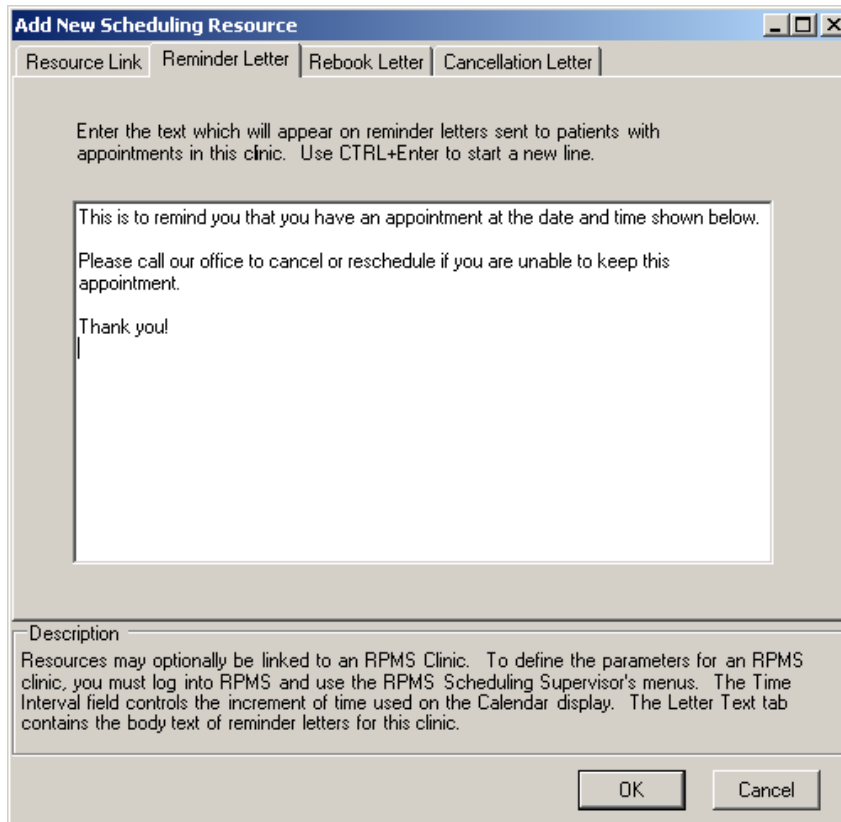
Figure 6-15: Reminder Letter tab on the Add New Scheduling Resource dialog box

> **Note**: Do not press return at the end of a line. Doing so closes this dialog box, sends you an error message, and takes you to the previous window.

8. Click **OK** to save your letter or Cancel to dismiss the dialog box without saving your entries.

This completes the procedure for adding a new resource.

6.2.1.2   Editing a Resource

This section provides instructions for editing a resource. Using the instructions in this section, you can:

- Edit a resource name

- Inactivate or reactivate a resource

- Change the time scale of a resource

- Revise RPMS clinic link information

- Edit patient letters using the Reminder, Reboot, and Cancellation Letter tabs

To edit a Resource:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resources and Users** tab in the Scheduling Management window shown in Figure 6-13.

3. Select the Resource you want to edit.

4. Click **Change**. The Edit Scheduling Resource window shown in Figure 6-16 opens.

Figure 6-16: Edit Scheduling Resource dialog box

5. Make the following changes as necessary:

   - Change the name of the resource in the **Resource Name** text box.

   - Check or uncheck the **Inactive** box to inactive or reactive this resource.

   - Reset the minutes by selecting another number from the **Time Scale** list.

   - Edit the fields in the **RPMS Clinic Link** tab. To define the parameters for an RPMS clinic, you must log into RPMS and use the RPMS Scheduling Supervisor's menu.

   - Select **Reminder Letter**, **Rebook Letter**, or **Cancellation Letter**; and edit the text as necessary. Figure 6-17 provided an example of letter text.
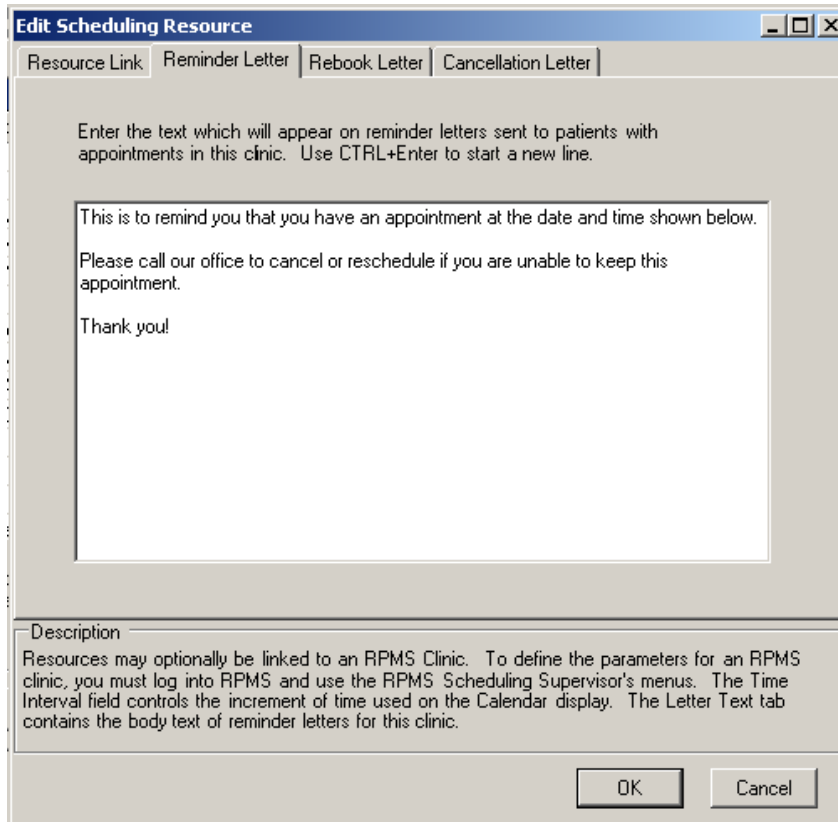
Figure 6-17: Reminder Letter tab on the Edit Scheduling Resource dialog box

> **Note**: Do not press return at the end of a line. Doing so closes this dialog box, sends you an error message, and take you to the previous window.

6. Click **OK** to save your changes or **Cancel** to dismiss the dialog box without saving your entries.

This completes the procedure for editing a resource.

6.2.1.3   **Maintaining Resource Users**

Use these steps to add, change, or remove users who can create appointments and establish availability for this Resource. Users must first be given basic access to the RPMS Scheduling package, using standard RPMS menu and key management before they can be selected and assigned as a resource user.

To add, change, or remove Resource users:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resources and Users** tab in the Scheduling Management window.

3. Expand the Resource you want by clicking the plus sign (+) next to it as shown in Figure 6-18.
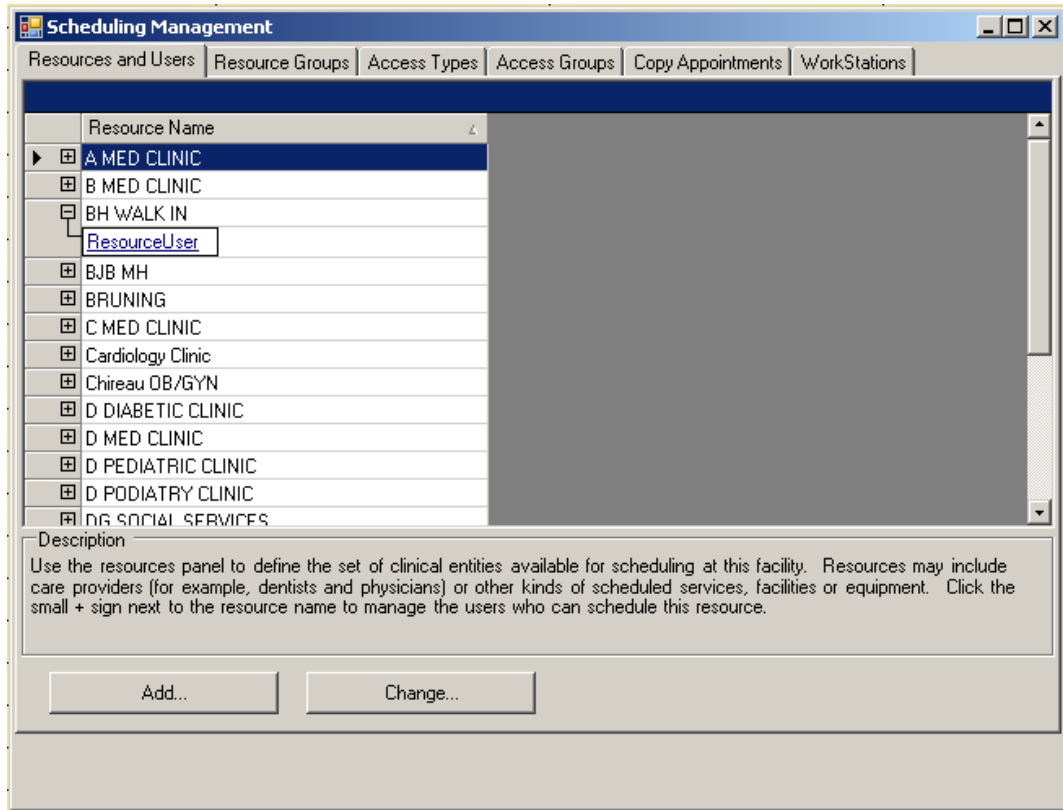
Figure 6-18: Defining Resource users

4. Click **ResourceUser**.

   The current list of Resource Users is displayed. Figure 6-19 is provided as an example.
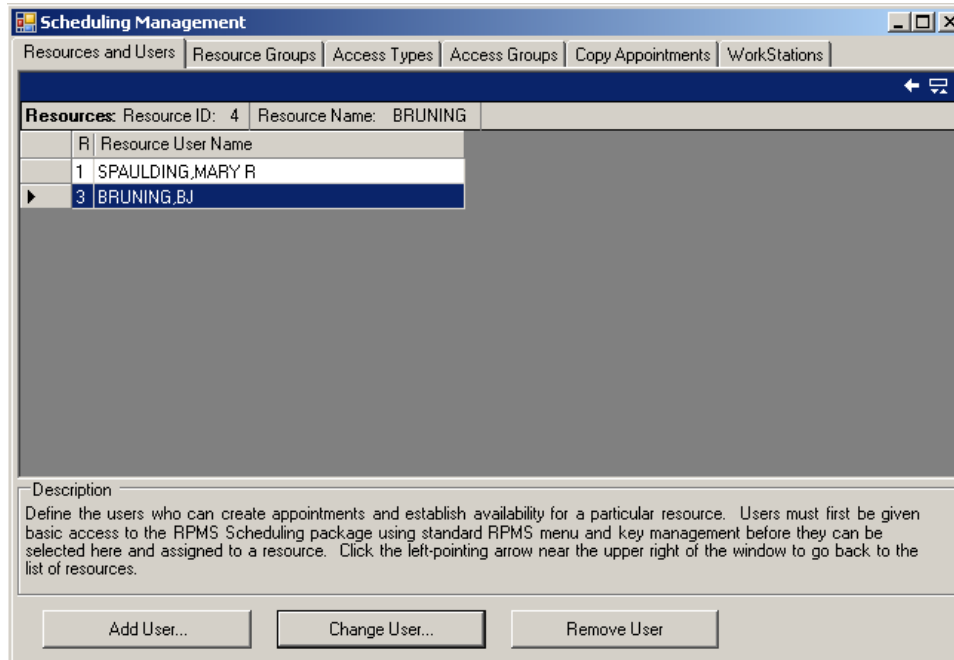
Figure 6-19: New Resource User added

5. Do one of the following:

- Click **Add User** to add a new user. The Add New Resource User dialog box shown in Figure 6-20 is displayed. Type the name of the new user and check the boxes as necessary. If you want this user to be able to overbook appointments, click the **Overbook** check box. If you want this user to be able to modify the schedule, click the **Modify Clinic Availability** check box. Click **OK** to add this user or **Cancel** to dismiss the dialog box without saving your entries.

> **Note**: At least one user at your site must be able to perform each of the tasks listed. It is also recommended that a limited number of users at each site have **Modify Clinic Availability** privileges.
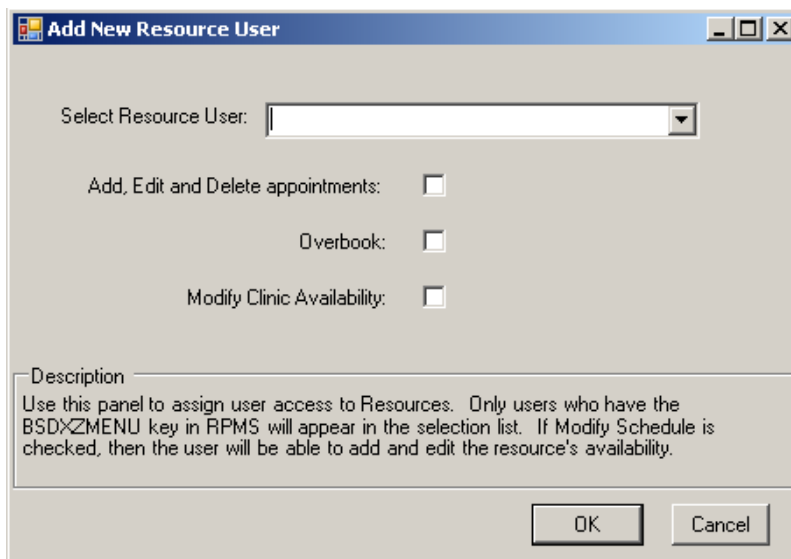
Figure 6-20: Add New Resource User dialog box

- Select a user and click **Change User** to edit an existing user. The Edit Scheduling Resource dialog box shown in Figure 6-21 is displayed. Check or uncheck the attributes for the selected user as necessary. If you want this user to be able to overbook appointments, click the **Overbook** check box. If you want this user to be able to modify the schedule, click the **Modify Clinic Availability** check box. Click **OK** when you finish to save your changes or **Cancel** to dismiss the dialog box and discard your changes.

> **Note**: Only users who have the BSDXZMENU key in RPMS appear in the selection list. When you are editing an existing user, you cannot alter their name.
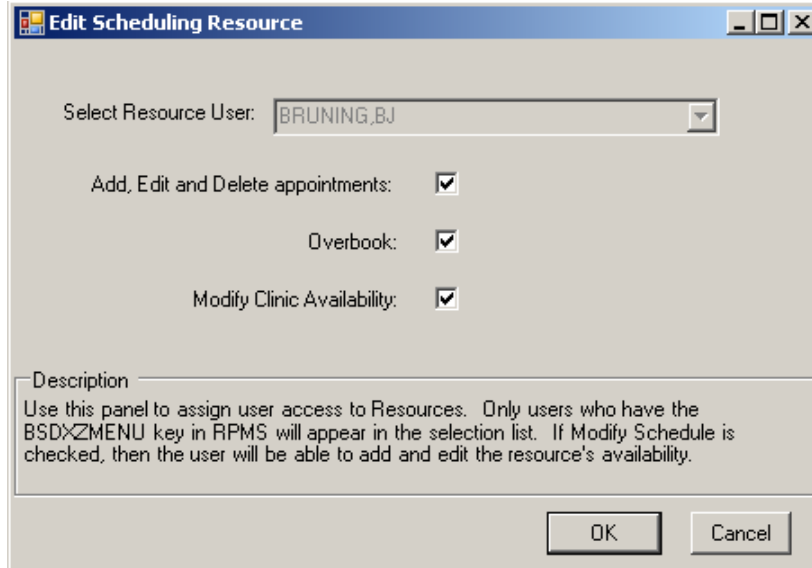
Figure 6-21: Edit Scheduling Resource dialog box

- Select a user and click **Remove User**. Figure 6-22 shows the updated window after a user was deleted from this Resource. There is no confirmation message before the user is deleted so be careful to select the correct user. Click **OK** when you finish to save your changes or **Cancel** to dismiss the dialog box and keep this user.
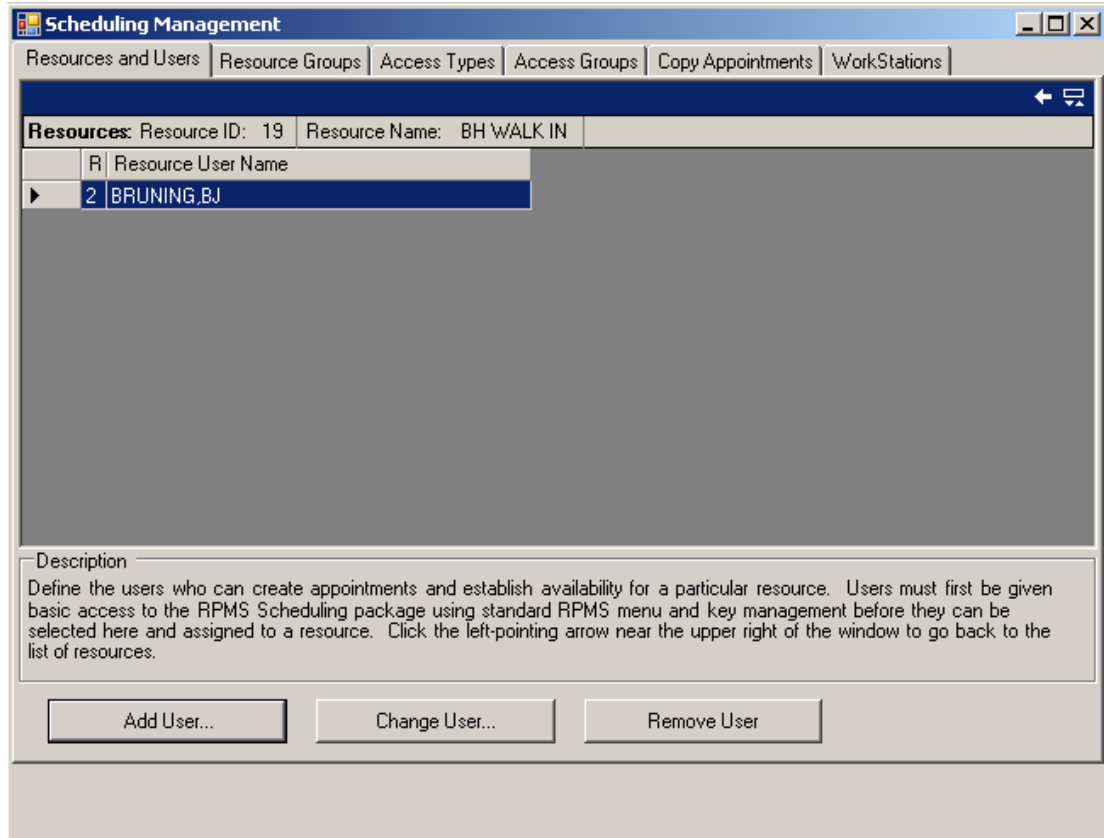
Figure 6-22: Scheduling Management window with Resources and Users tab selected

6.2.2   Resource Groups

Use this window to organize Resources into useful groups. Resource Groups may include departments, clinics, or any other collection of Resources. Resource Groups are visible to all scheduling users.

To display the Scheduling Management window shown in Figure 6-23 select **Scheduling Management** from the File menu.
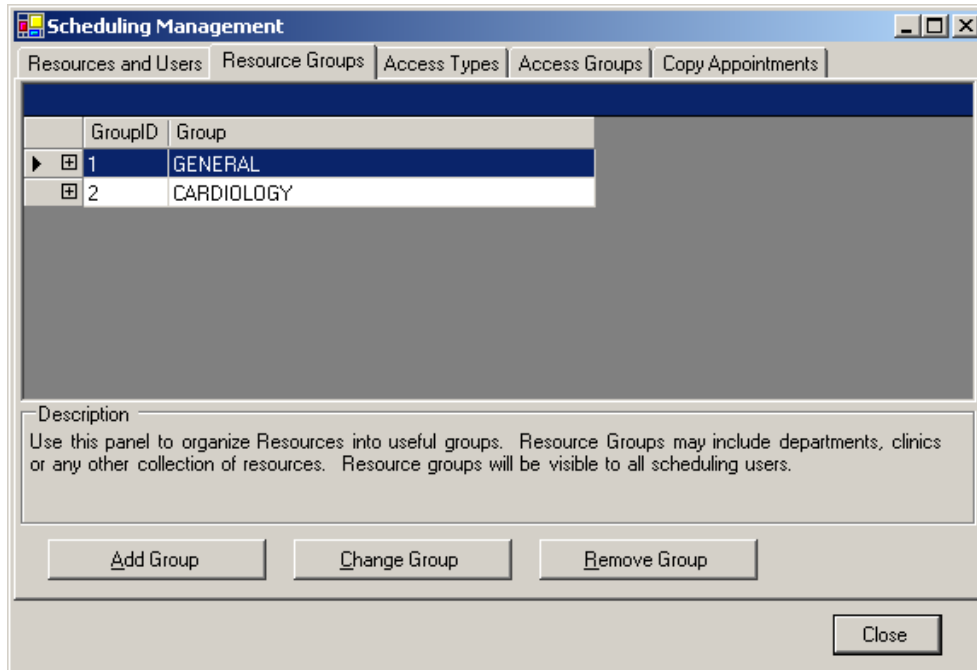
Figure 6-23: Scheduling Management window with Resource Groups tab selected

6.2.2.1   Adding a Resource Group

This section provides instructions for adding a resource group. In the example shown in Figure 6-23 there are two resource groups displayed. After you add a resource group, you can add resources to the resource groups, you create. See **Adding Resources to Resource Groups** on page 66 for instructions.

To add a Resource Group:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resource Groups** tab in the Scheduling Management window.

3. Click **Add Group** to add a new Resource Group. The Add New Resource Group window is displayed.

4. Type the name of the new Resource Group in the **Resource Group Name** text box as shown in Figure 6-24.
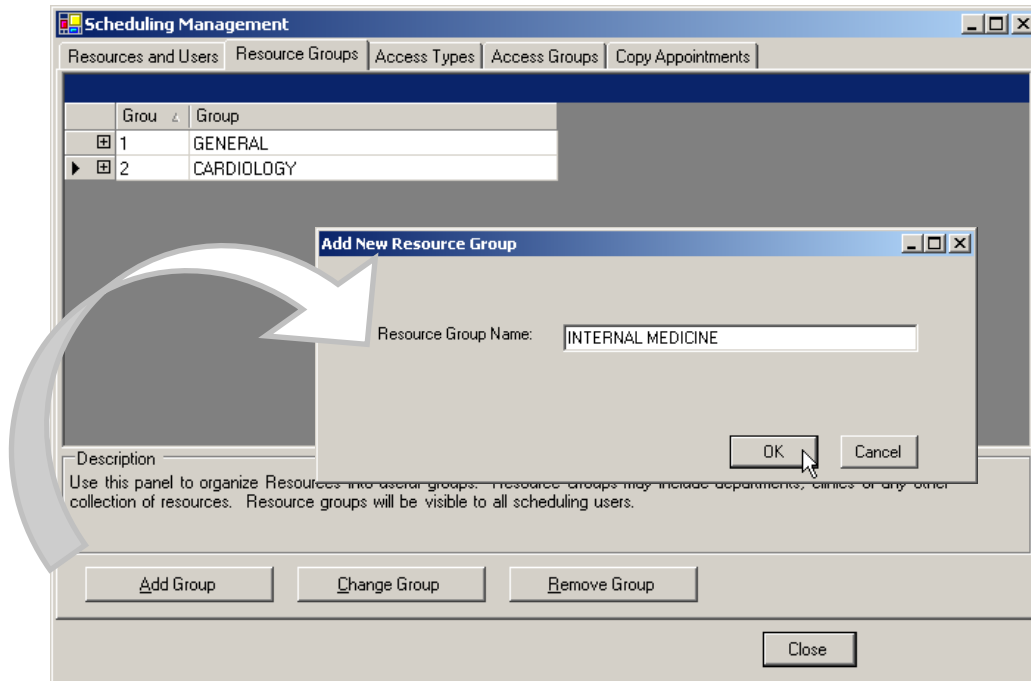
Figure 6-24: Adding a Resource Group

5. Click **OK** to add the new Resource Group to the list of Resource Groups as shown in Figure 6-25 or **Cancel** to dismiss the dialog box without adding your entry.
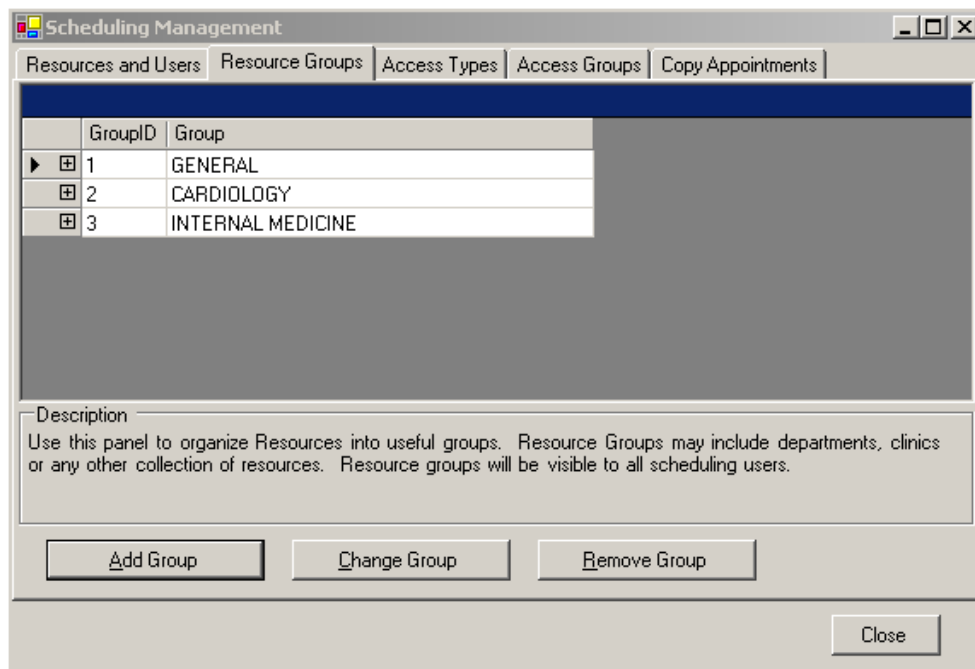
Figure 6-25: Adding a Resource Group

This completes the s instructions for adding a resource group. You can add resources to the resource groups you created. See **Adding Resources to Resource Groups** on

page 66 for instructions. Otherwise, select another tab or click **Close** to exit the Scheduling Management window.

6.2.2.2   Adding Resources to Resource Groups

This section provides instructions for adding resources such as diagnostics, clinics, procedures, and so forth to a resource.

To add a resource to a resource group:

1. Select **Scheduling Management** from the **File** menu.

2. Click **Resource Groups** tab in the Scheduling Management window.

3. Click the plus sign (+) next to the Resource Group to which you want to add a resource as shown in Figure 6-26.
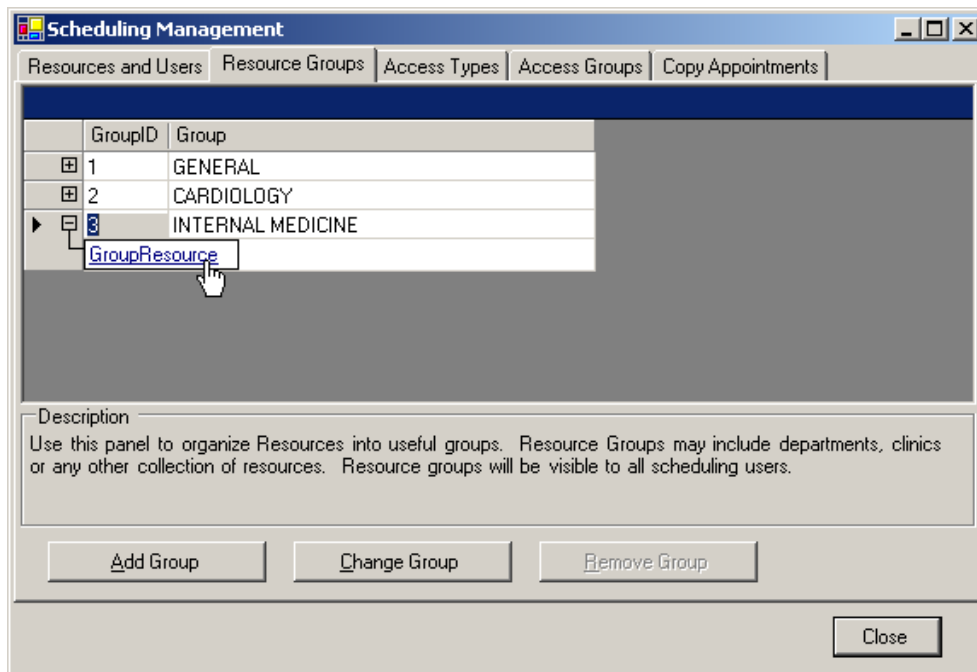
Figure 6-26: Adding Resources to groups (steps 1 and 3)

4. Click **GroupResource**. A list of available Resources is displayed as shown in Figure 6-27.
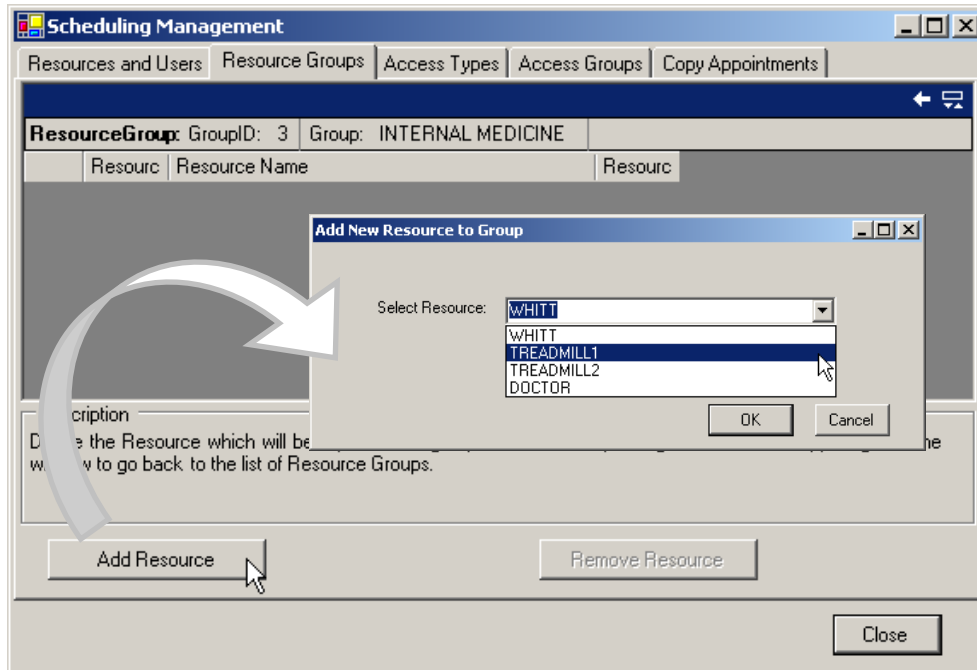
Figure 6-27: Adding Resources to groups

5. Select the Resource you want to add from the **Select Resource** drop-down list in the Add New Resource to Group dialog box and click **OK**.

    The Resource is now listed in the Resource Group as shown in Figure 6-28.
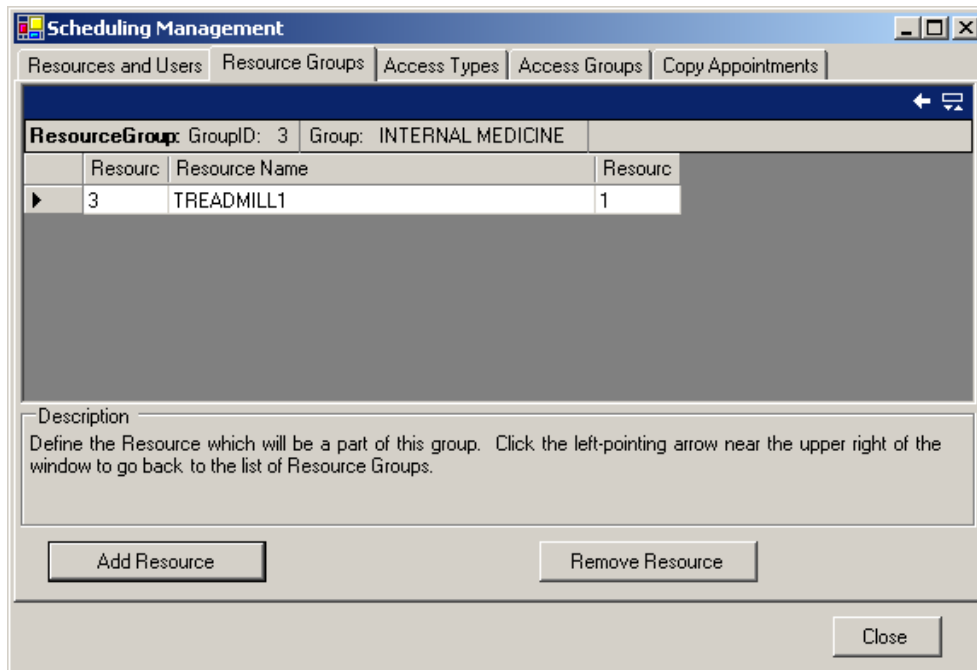
Figure 6-28: Scheduling Management window showing new resource group

This completes the procedure for adding a new resource to the Resources Groups tab. To remove a resource, see Removing a Resource from Resource Groups on page 71.

Otherwise, select another tab or click **Close** to exit the Scheduling Management window.

6.2.2.3   Removing a Resource from Resource Groups

This section provides instructions for removing a resource from a Resource Group.

To remove a Resource from a group:

1.   Select **Scheduling Management** from the **File** menu.

2.   Click the **Resource Groups** tab in the Scheduling Management window.

Figure 6-29 is provided as an example
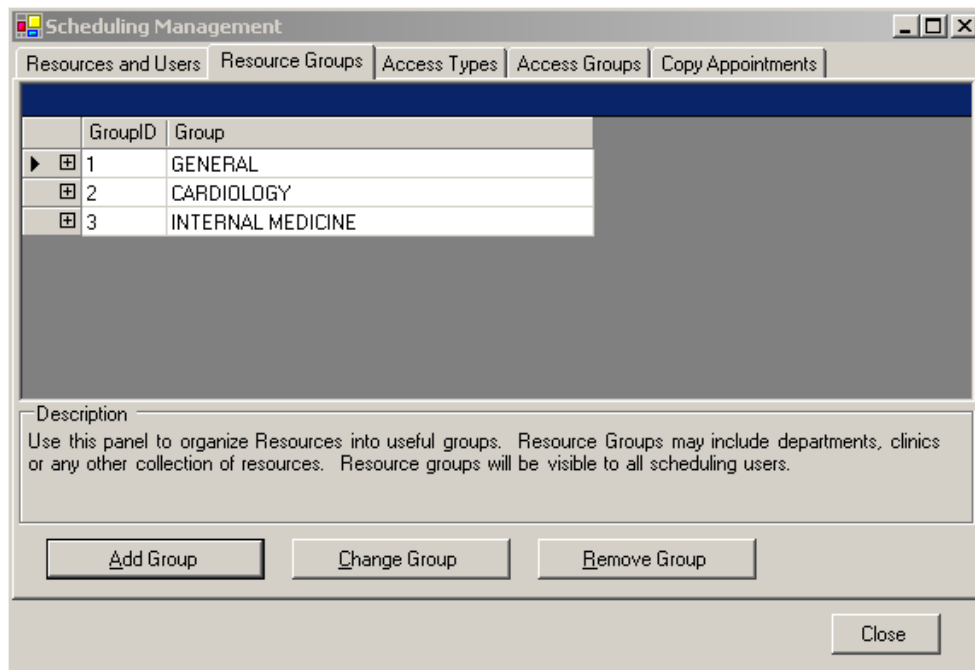
Figure 6-29: Adding a Resource Group

3.   Click the plus sign (+) next to the Resource Group from which you want to remove a resource as shown in Figure 6-30.
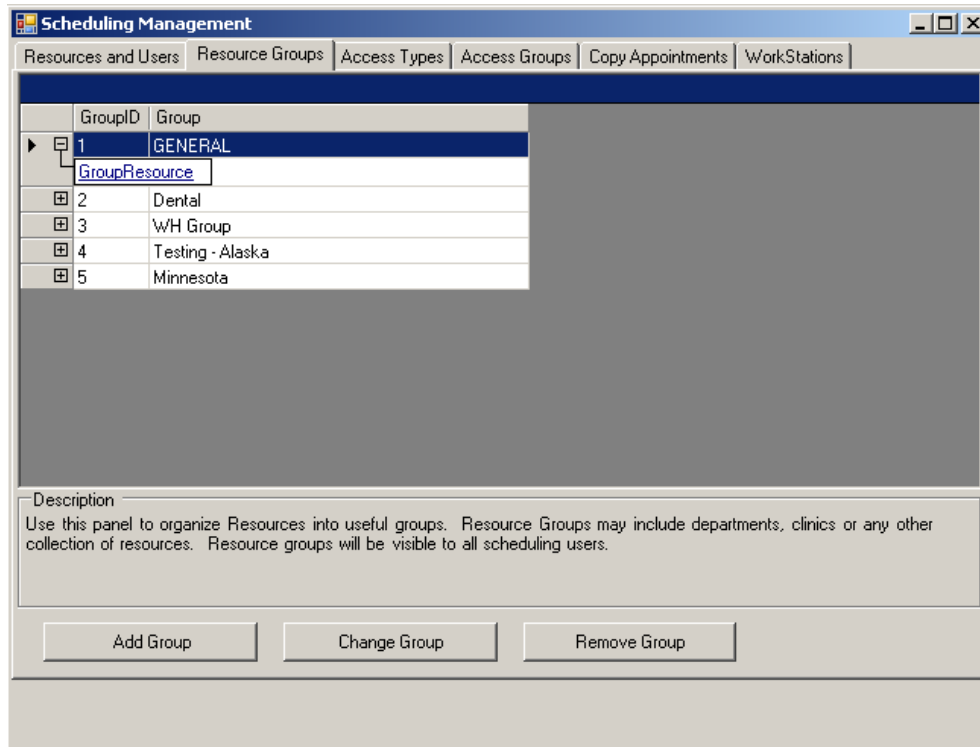
Figure 6-30: Opening a list of Resources

4. Click **GroupResource** to display a list of resources similar to the one shown in Figure 6-31.
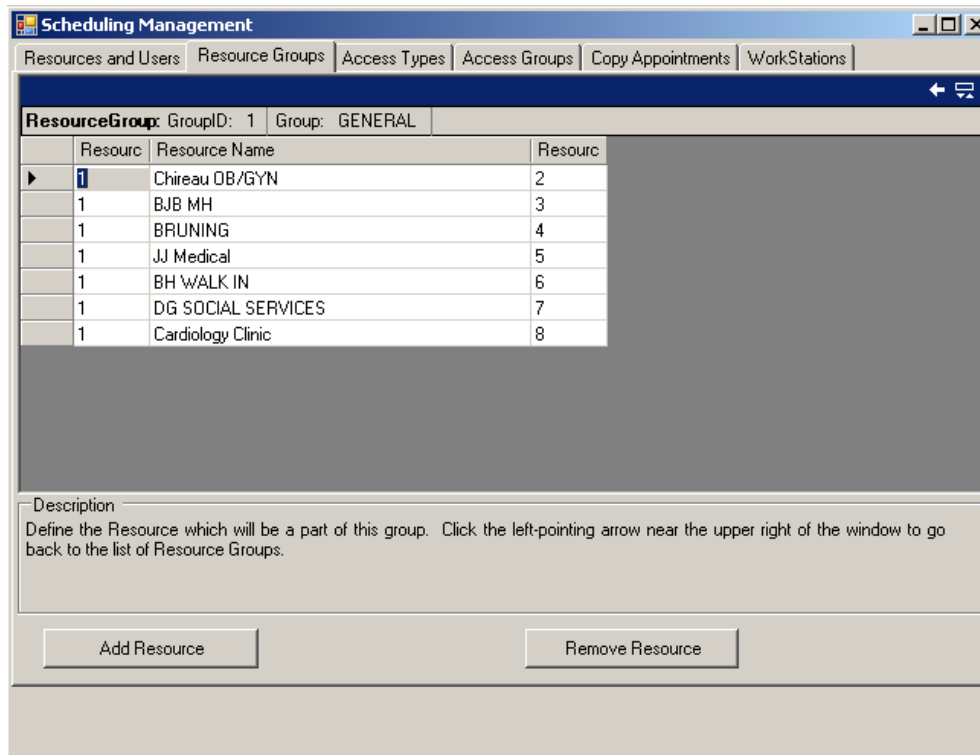
Figure 6-31: Removing a Resource

5. Select the resource you want to remove from the list.

6. Click **Remove Resource** to delete this resource from the list. There is no confirmation message before the resource is deleted so be careful to select the correct resource. This does not delete the resource completely; it only removes the resource from the Resource Group.

This completes the procedure for removing a resource from a Resource Group. To remove more resources, repeat this procedure. Otherwise, select another tab or click **Close** to exit the Scheduling Management window.

6.2.2.4 Editing a Resource Group

This section provides instructions for editing a Resource group.

To edit a Resource Group:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resource Groups** tab in the Scheduling Management window.

3. Select the Resource Group you want to change.

4. Click **Change Group** to edit this Resource Group. The **Edit Resource Group** dialog box shown in Figure 6-32 is displayed.
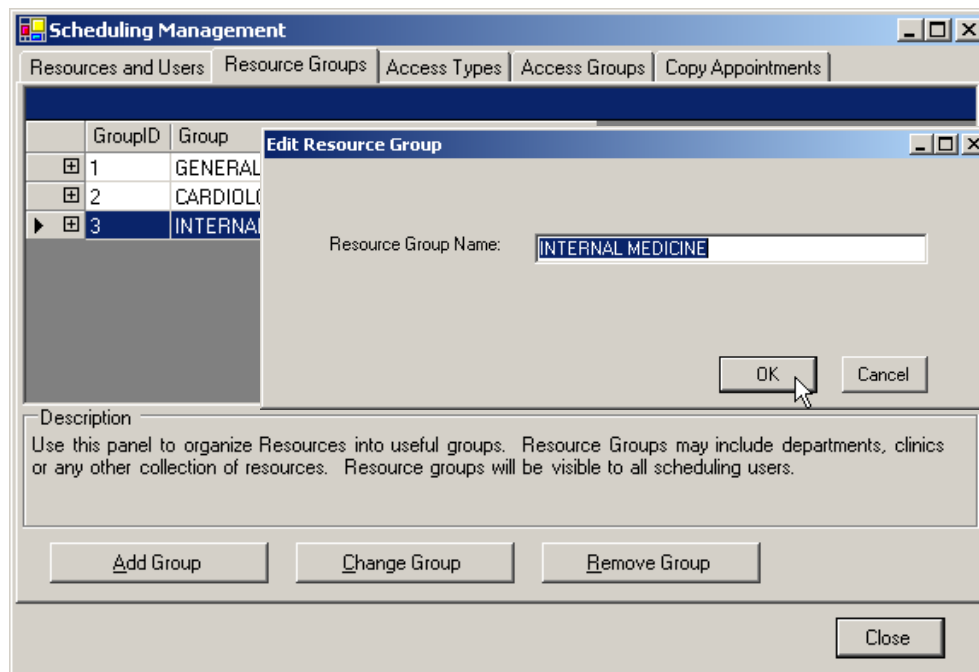
Figure 6-32: Edit Resource Group dialog box

5. Change the name of the Resource Group in the Resource Group Name text box. No changes are made to the actual resources within the Resource Groups.

6. Click **OK** to save your changes or **Cancel** to dismiss the Edit Resource Group and return to the **Resource Groups** tab without changing the name.

This completes the procedure for editing a Resource Group. Repeat this procedure to edit more Resource Groups, select another tab, or click **Close** to exit the Scheduling Management window.

6.2.2.5   Removing a Resource Group

Use this option to remove Resource Groups that are no longer needed. This does not delete the Resources within the group; only the group is deleted.

To remove a Resource Group, follow:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Resource Groups** tab in the Scheduling Management window.

3. Select the Resource Group you want to remove as shown in Figure 6-33.
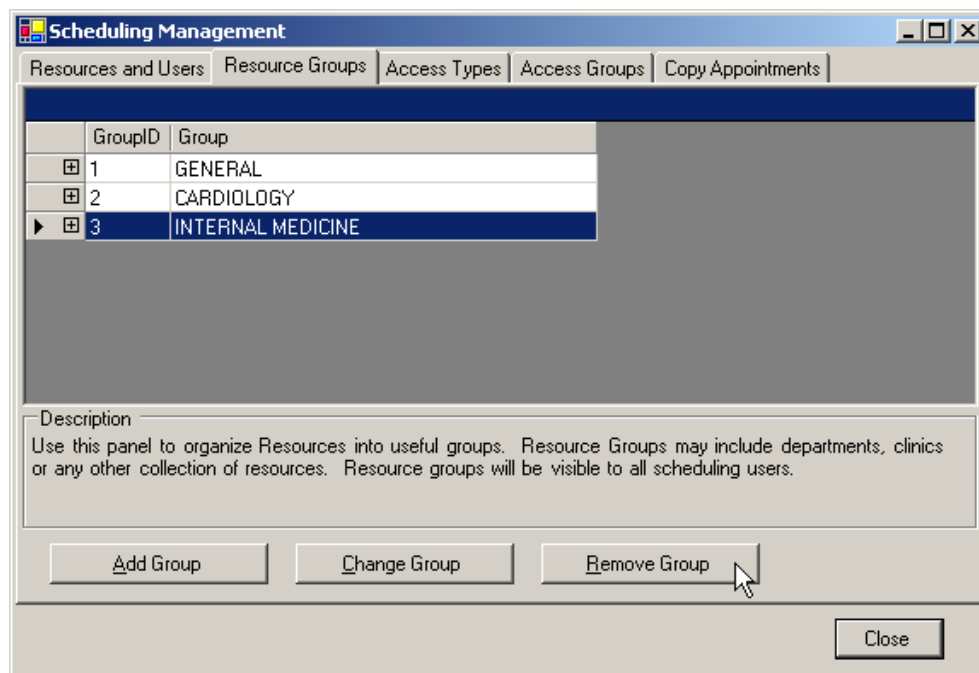
Figure 6-33: Removing a Resource Group

4. Click **Remove Group** to remove a Resource Group.

> **Note:** There is no prompt asking you to confirm your choice, so be careful when removing Resource Groups.

This completes the procedure for removing a Resource Group. Repeat this procedure to remove more Resource Groups; select another tab, or click **Close** to exit the Scheduling Management window.

6.2.3 Access Types

Access types refer to the type of appointment being scheduled (such as routine physical, injection, and so on.). The following procedures provide instructions for adding and editing Access Types that can are used when scheduling an appointment.

6.2.3.1   Add an Access Type

The following procedure provides instructions for adding an access type. An access type describes an appointment category (for example: walk-in, first visit, routine exam, consultation, and so on.

To add an Access Type:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Types** tab in the Scheduling Management window.

3. Click **Add Access Type** to add a new Access Type. The Manage Access Types dialog box is displayed.

4. Type the name of the new Access Type in the **Access Type Name** text box of the Manage Access Types dialog box..

5. Click **Select Display Color**. The Color dialog box shown in Figure 6-34 is displayed.
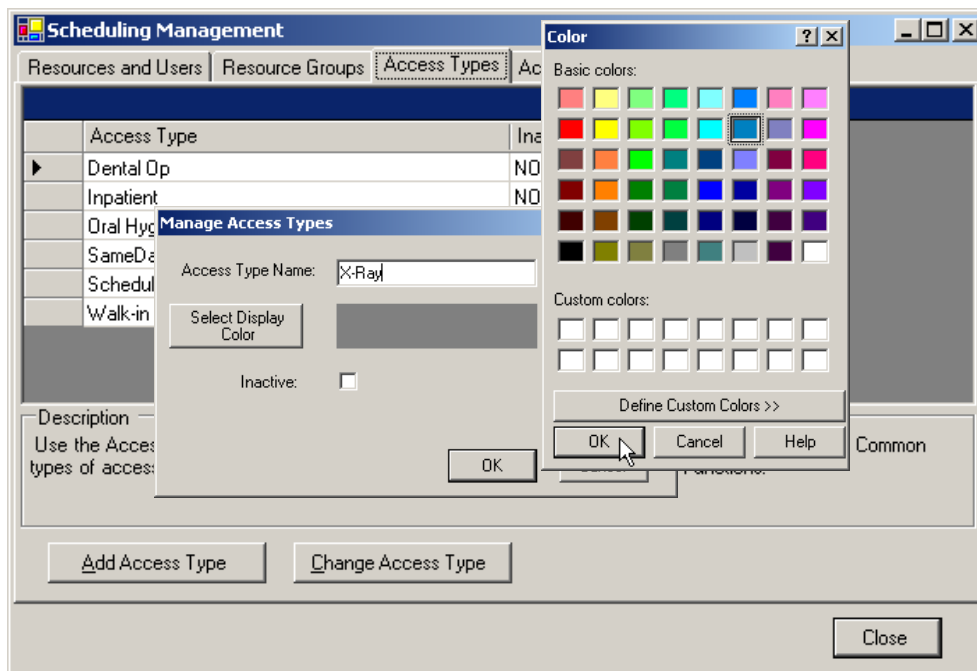
Figure 6-34: Manage Access Types

6. Click a color swatch for the Basic color you want to assign to the new access type or click **Define Custom Colors** to create a new color.

If you define a custom color, click **Add Custom Colors** to save it on Custom colors palette on the Color dialog box.

7. Click **OK** on the Colors dialog box.

8. Click **OK** on the Manage Access Types dialog box.

9. Click **OK** in the Manage Access Types window. The new Access Type is now listed on the Access Types list.

This completes the procedure for adding an Access Type. The following section provides instructions for editing an Access Type. Repeat this procedure to add more Access Types, select another tab, or click **Close** to exit the Scheduling Management window.

6.2.3.2   Edit an Access Type

This section provides instructions for editing an access type. Using the instructions in this section, you can:

- Edit an access type name

- Change the color used to display an access type

- Change the status of an access type (by checking or unchecking Inactive)

To edit an Access Type:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Types** tab in the Scheduling Management window.

3. Select the row for the Access Type you want to edit (in Figure 6-35 *Inpatient* is selected on the Access Types tab).
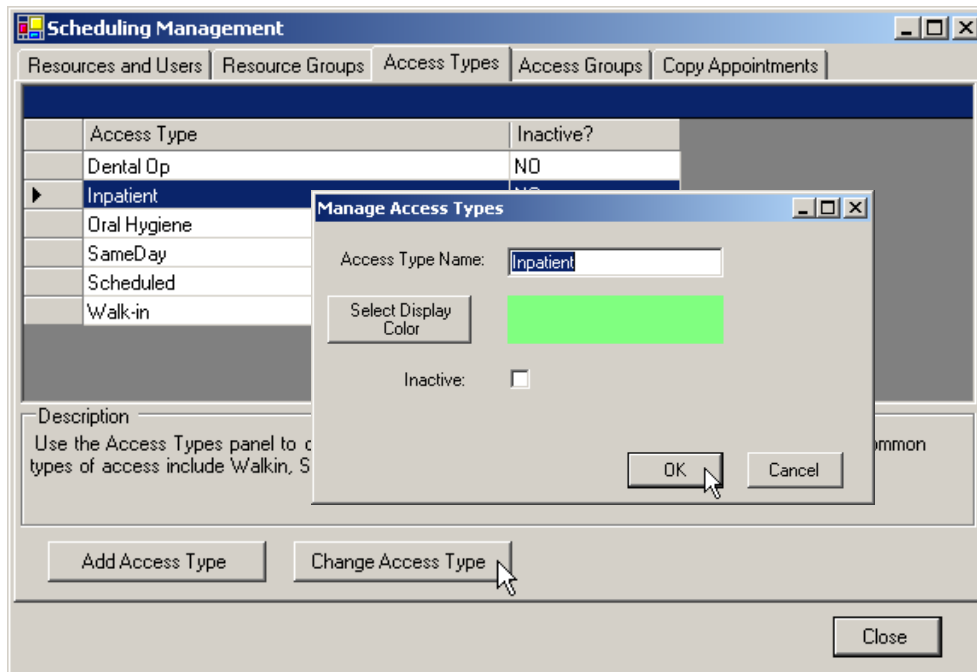
Figure 6-35: Screen examples for Editing an Access Type

4. Click **Change Access Type** to edit the Access Type. The Manage Access Types dialog box shown in Figure 6-35 is displayed.

5. Do any of the following as necessary:

   - Change the Access Type name, as necessary.

   - Click another color swatch for the Basic color you want to assign to the access type or click **Define Custom Colors** to create a new color.

     If you define a custom color , click **Add Custom Colors** to save it on Custom colors palette on the Color dialog box.

   - Check or uncheck the Inactive box to change the status of the Access Type.

6. Click **OK** to save your changes or **Cancel** to dismiss the Manage Access Types and return to the **Access Types** tab without saving your changes.

This completes the procedure for editing an Access Type. Repeat this procedure to edit more Access Types, select another tab, or click **Close** to exit the Scheduling Management window.

The following section provides instructions for adding, editing, and removing Access Groups, as well as adding Access Types to Access Groups.

6.2.4   Access Groups

Access Groups are categories of different Access Types. You can organize Access Types for faster searching and scheduling.

6.2.4.1   Add an Access Group

The following procedure provides instructions for adding an Access Group.

To add an Access Group:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Groups** tab in the Scheduling Management window to display the Add New Access Group dialog box shown in Figure 6-36.
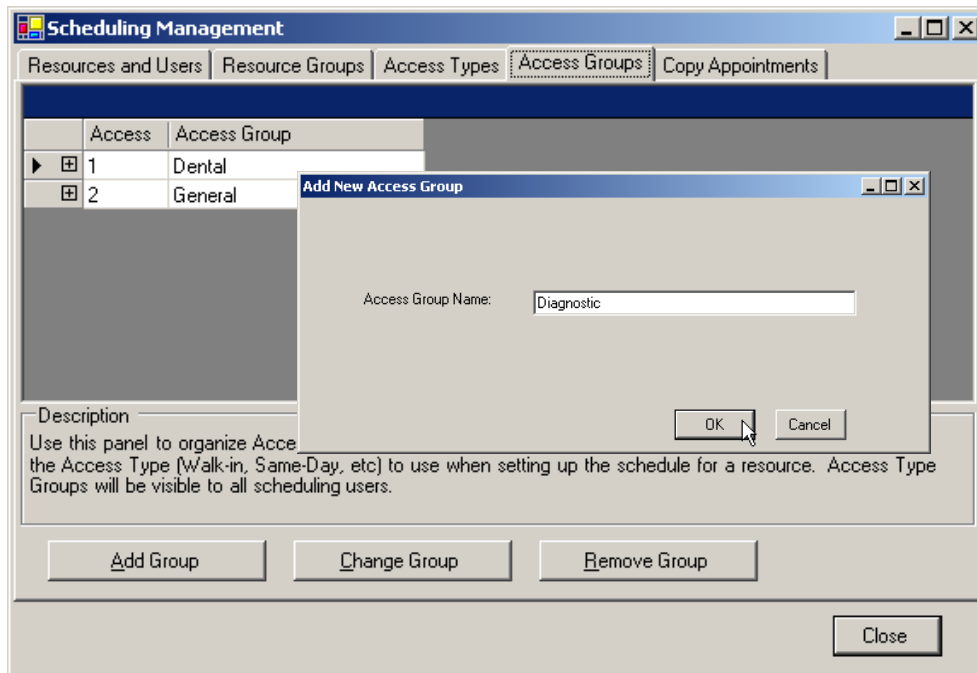
Figure 6-36: Add New Access Group dialog box

3. Click **Add Group** to add a new Access Group. The Add New Access Group dialog box shown in Figure 6-36 is displayed

4. Type the name of the new Access Group in the **Access Group Name** text box.

5. Click **OK** to add the new Access Group or **Cancel** to close the Add New Access Group dialog box without adding a new Access Group.

   If you clicked OK, the new Access Group is listed in the window as shown in the Figure 6-37.
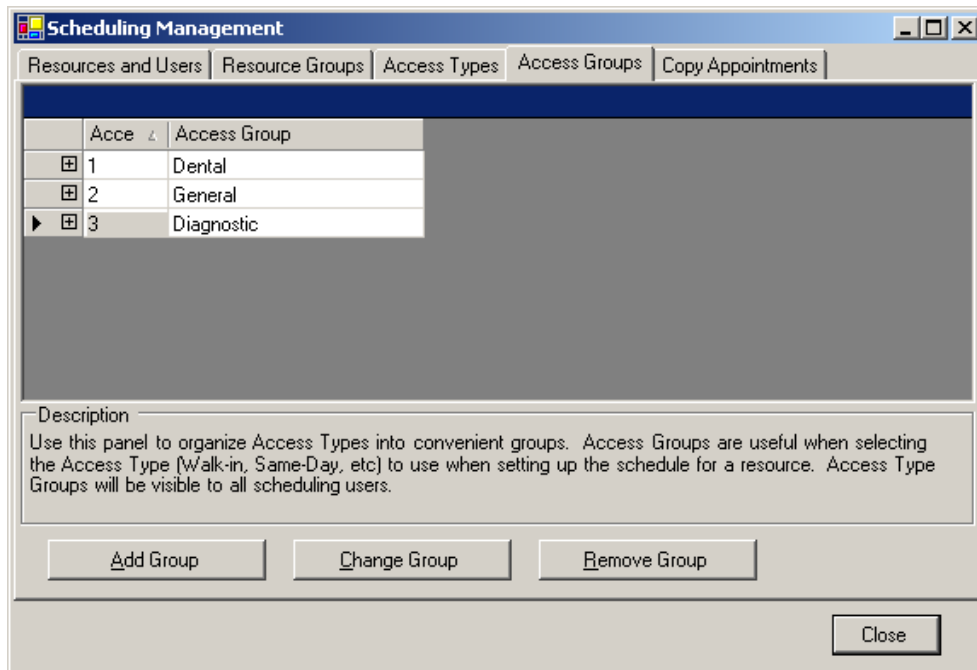
Figure 6-37: Access Group dialog list with a new Access Group added

This completes the procedure for adding a new Access Group. To add Access Types to Access Groups, see Adding Access Types to Access Groups in the section that follows. Repeat this procedure to add more Access Groups, select another tab, or click **Close** to exit the Scheduling Management window.

6.2.4.2   Adding Access Types to Access Groups

This section provides instructions for adding Access Types to Access Groups.

To add an Access Type to Access Groups

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Groups** tab in the Scheduling Management window.

3. Click the plus sign (+) next to the appropriate Access Group as shown in the example in Figure 6-38.
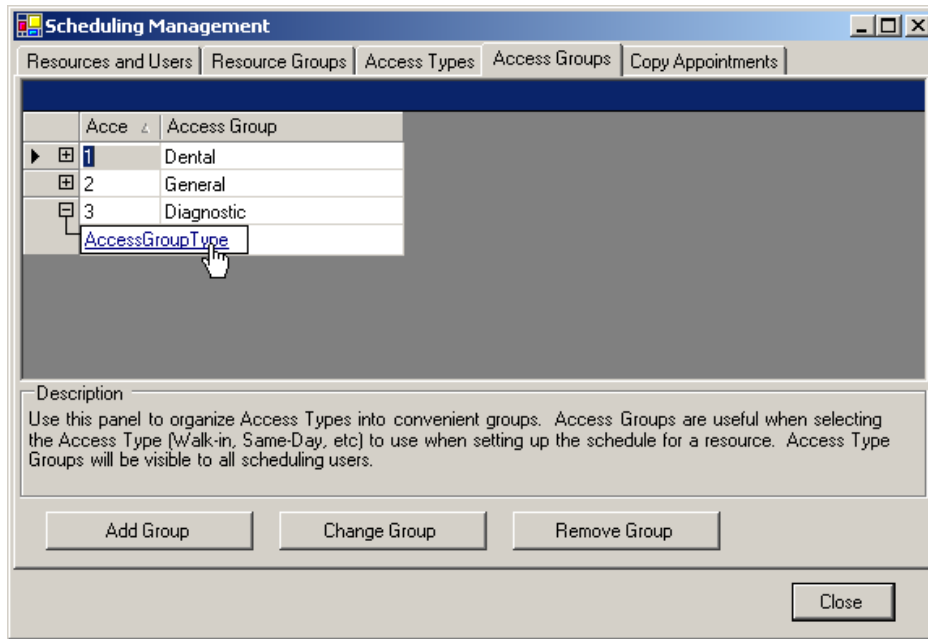
Figure 6-38: Adding an AccessGroup Type

4.   Click **AccessGroupType**. The list shown in Figure 6-39 is displayed.
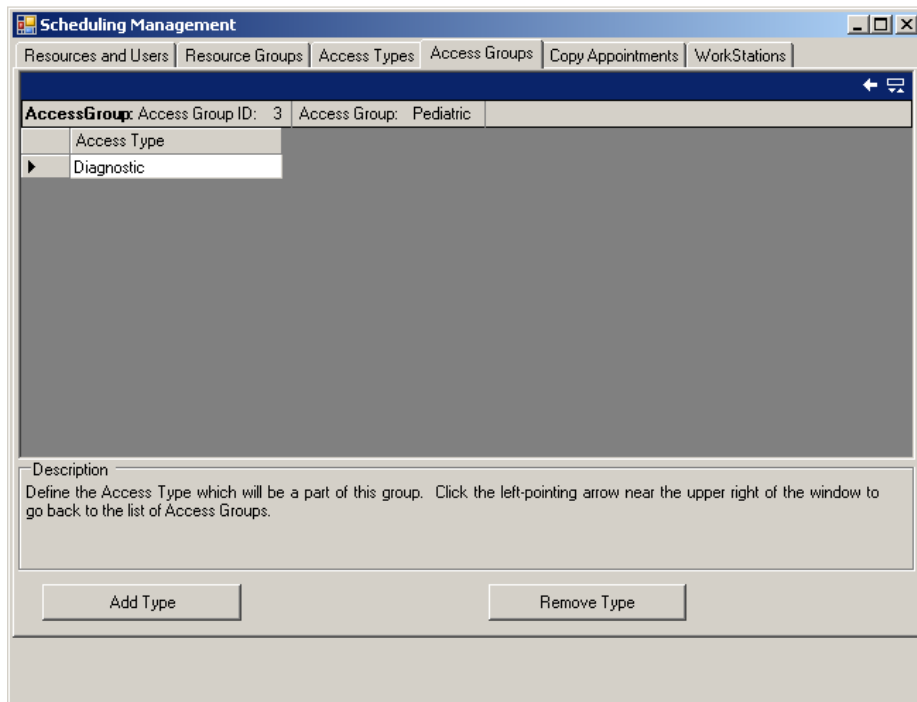
Figure 6-39: Adding an Access Type

5.   Click **Add Type**. The Add New Access Type to Group dialog box shown in Figure 6-40 is displayed.
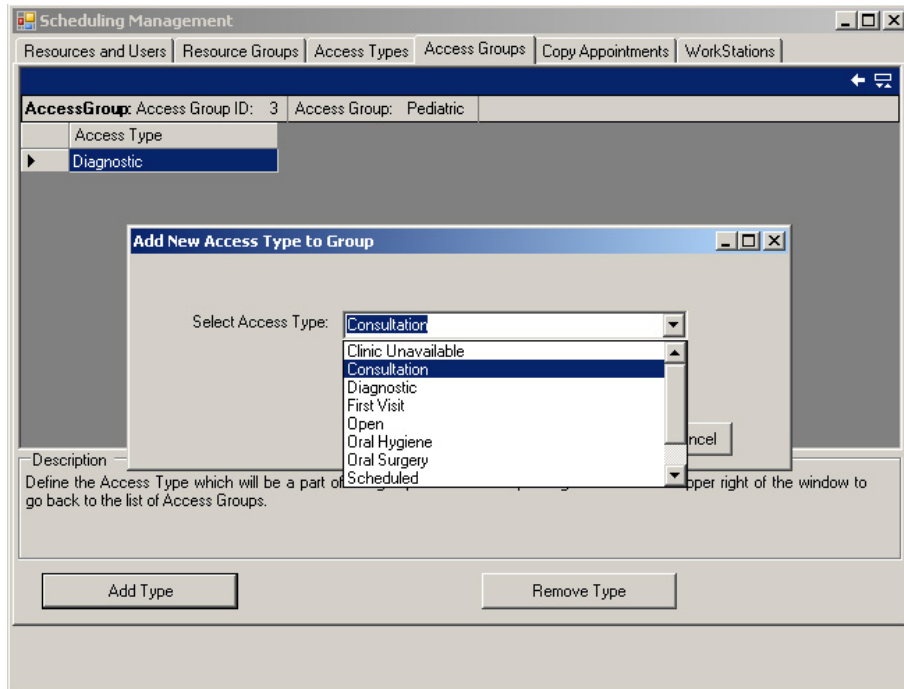
Figure 6-40: Adding a New Access Type

6. Select an Access Type from the **Select Access Type** drop-down list and click **OK** to add this Access Type or **Cancel** to return to the Scheduling Management Window without adding this Access Type.

   If you clicked OK, the new Access Type is now listed. Figure 6-41 is provided as an example.
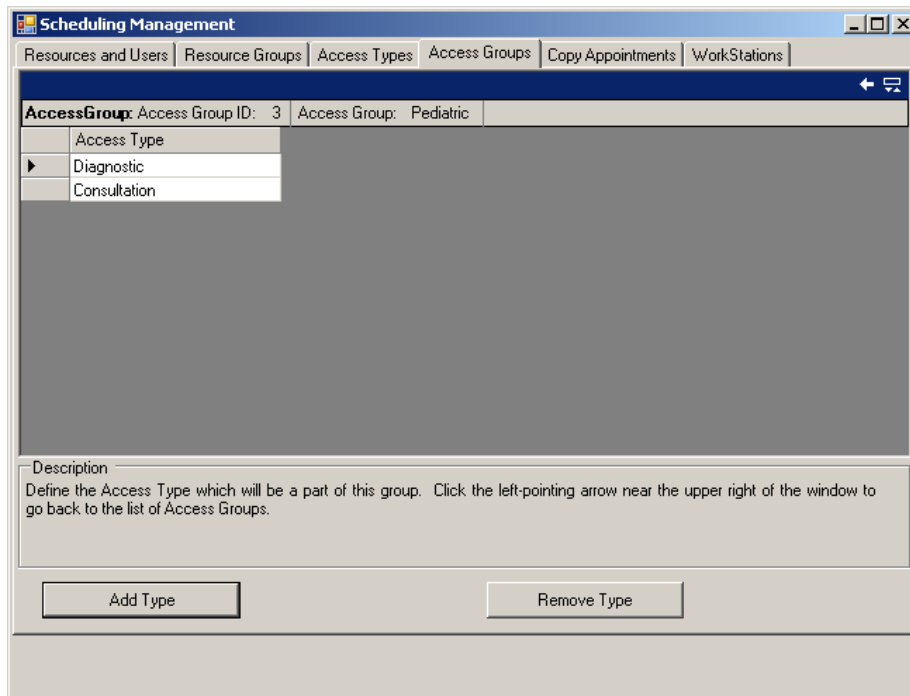
Figure 6-41: New Access Type Added to Access Group

This completes the procedure for adding new Access Types to Access Groups. You can continue adding more Access Types by using this procedure; or you can select another tab, or click **Close** to exit the Scheduling Management window.

The procedure the follows provides instructions for editing an Access Group.

6.2.4.3   Edit an Access Group

Use this option to edit the name of an Access Group.

To edit an Access Group

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Groups** tab in the Scheduling Management window.

3. Select the appropriate Access Group.

4. Click **Change**. The Edit Access Group dialog box shown in Figure 6-42 is displayed.
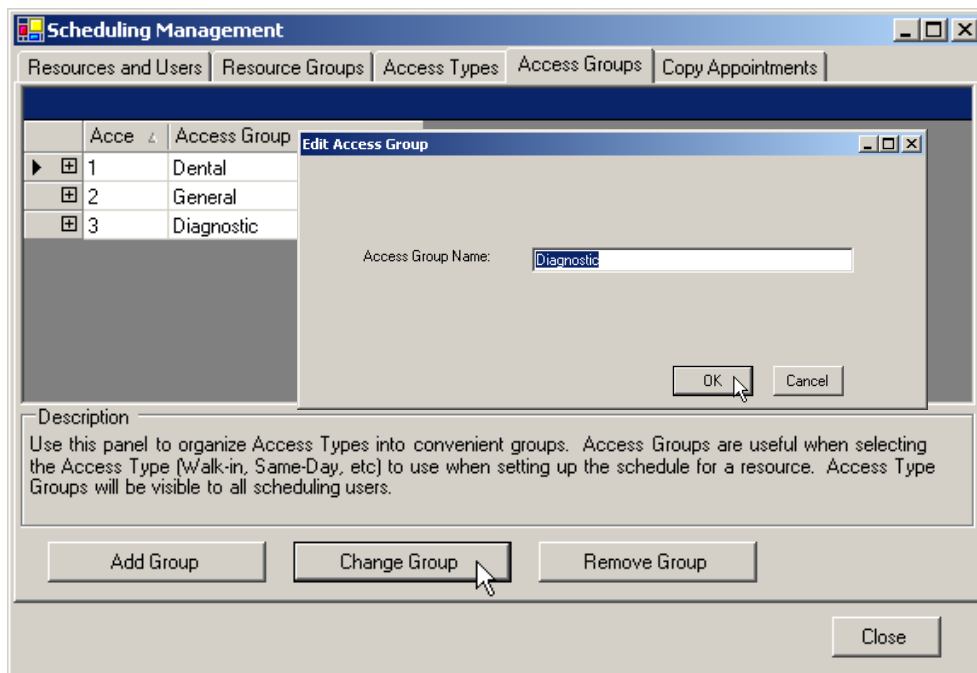
Figure 6-42: Editing an Access Group

5. Edit the name of the Access Group in the **Access Group Name** text box shown in Figure 6-42. No changes are made to the actual Access Types within the Access Groups.

6. Click **OK** to save the edited Access Group name or **Cancel** to return to the Scheduling Management window without changing the name.

This completes the procedure for editing an Access Groups name. You can continue editing Access Group names as necessary by repeating this procedure, or you can select another tab, or click **Close** to exit the Scheduling Management window.

The procedure the follows provides instructions for deleting an Access Group.

6.2.4.4 Remove an Access Group

The procedure that follows provides instructions for removing an Access Group that is no longer needed. This does not delete the Access Types within the group; only the Access Group is deleted.

To remove an Access Group:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Access Groups** tab in the Scheduling Management window.

3. Select the Access Group you want to remove.

4. Click **Remove Group** to remove an Access Group as shown in Figure 6-43
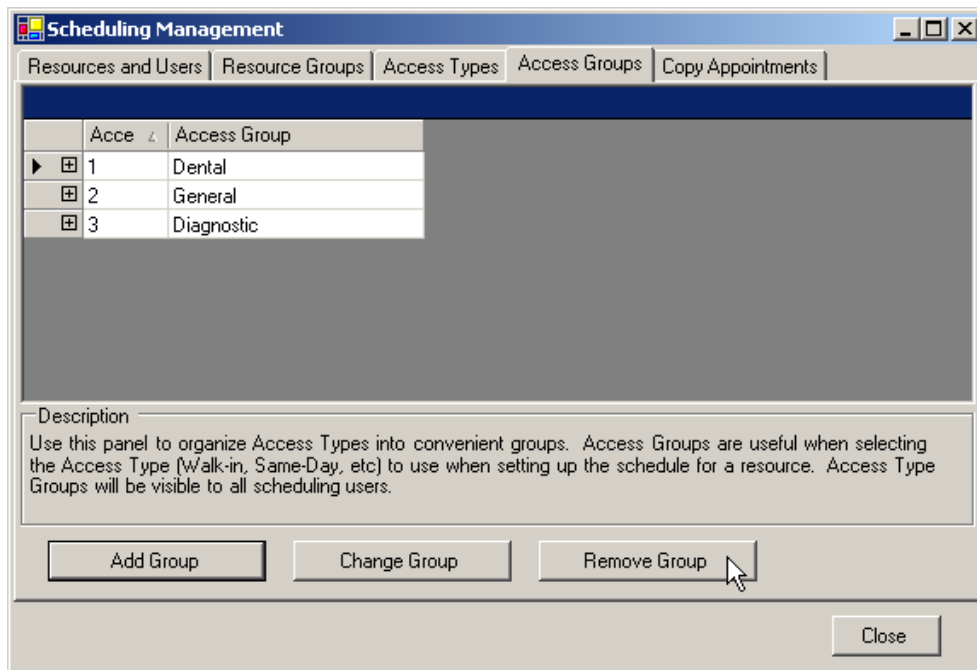
Figure 6-43: Removing an Access Group

The Access Group is removed from the Access Groups window.

Note: There is no prompt asking you to confirm your choice, so be careful when removing Access Groups.

This completes the procedure for removing an Access Group. You can continue updating Access Groups, or you can select another tab, or click **Close** to exit the Scheduling Management window.

The procedure the follows provides instructions for copying an RPMS appointments to this application.

6.2.5   Copy Appointments

The following procedure provides instructions for copying appointments from an RPMS clinic in to this application. All appointments, except cancelled appointments, are copied from the RPMS clinic to the selected Resource. This is useful if you want to move all scheduling tasks from RPMS *roll and scroll* to this application with its graphical user interface instead of reentering them manually.

To copy appointments from RPMS to an MS Windows Scheduling Resource,

1. Select **Scheduling Management** from the **File** menu.

2. Click the **Copy Appointments** tab in the Scheduling Management window to open the Copy Appointments tab shown in Figure 6-44.
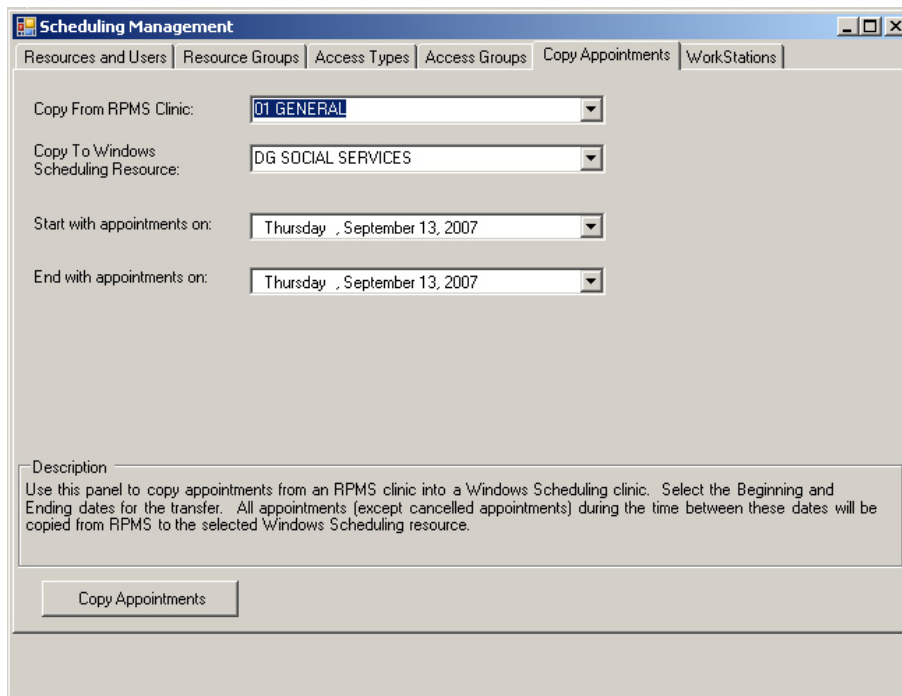
Figure 6-44: Copying appointments from RPMS into Windows Scheduling Resource

3. Select the RPMS clinic from which you want to copy appointments using the **Copy From RPMS Clinic** drop-down menu.

4. Select the Scheduling Resource to which you want to copy the appointments using the **Copy To Windows Scheduling Resource** drop-down menu.

5. Select the beginning date for the appointment transfer from the **Start with appointments on** drop-down menu.

6. Select the ending date for the appointment transfer from the **End with appointments on** drop-down menu.

7. Click **Copy Appointments**.

    The Copy Appointments window shown in Figure 6-45 opens displaying Job Summary and Status boxes.
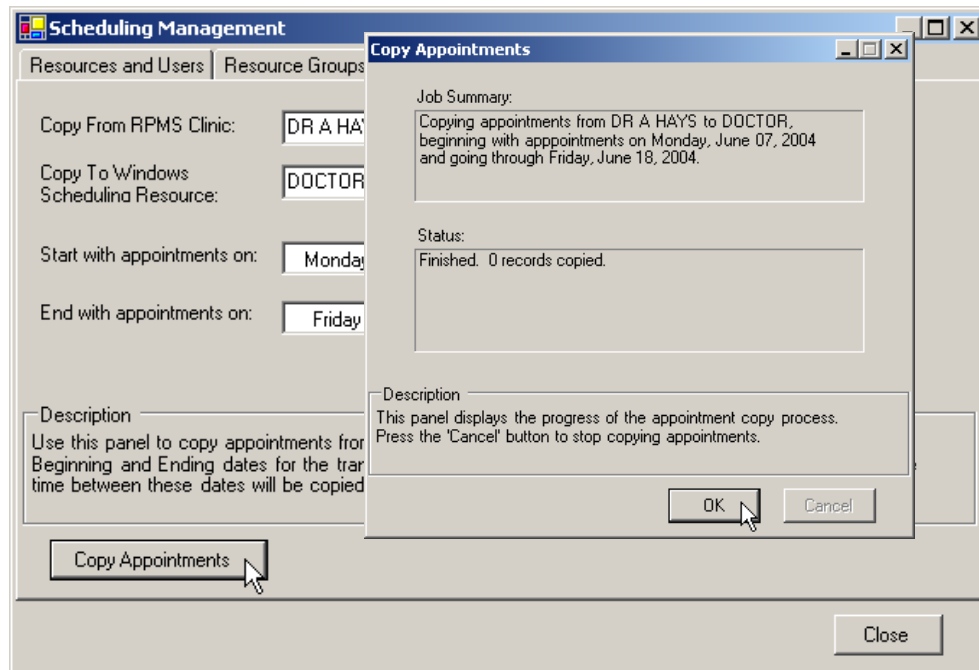
Figure 6-45: Copying appointments from RPMS into Windows Scheduling Resource

8. Click **Cancel** to stop the transfer before it finishes or click **OK** when the transfer is done.

This completes the procedure for copying RPMS appointments. You can continue moving more RPMS clinic schedules to this application, or you can select another tab, or click **Close** to exit the Scheduling Management window.

The procedure that follows provides instructions for changing colors used to *color code* you schedule to identify various types of appointments (open, closed, booked, and so on).

6.2.6 WorkStations

The WorkStations tab in Schedule Management allows a system administrator to view, communicate with, and shut down workstations running the clinical scheduling application.

6.2.6.1 Refresh Workstations List

The section provides instructions for finding out which workstations on your network are currently running this application.

To view the current list of workstations at your site running clinical scheduling software:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **WorkStations** tab in the Scheduling Management window to display the window shown in Figure 6-46.
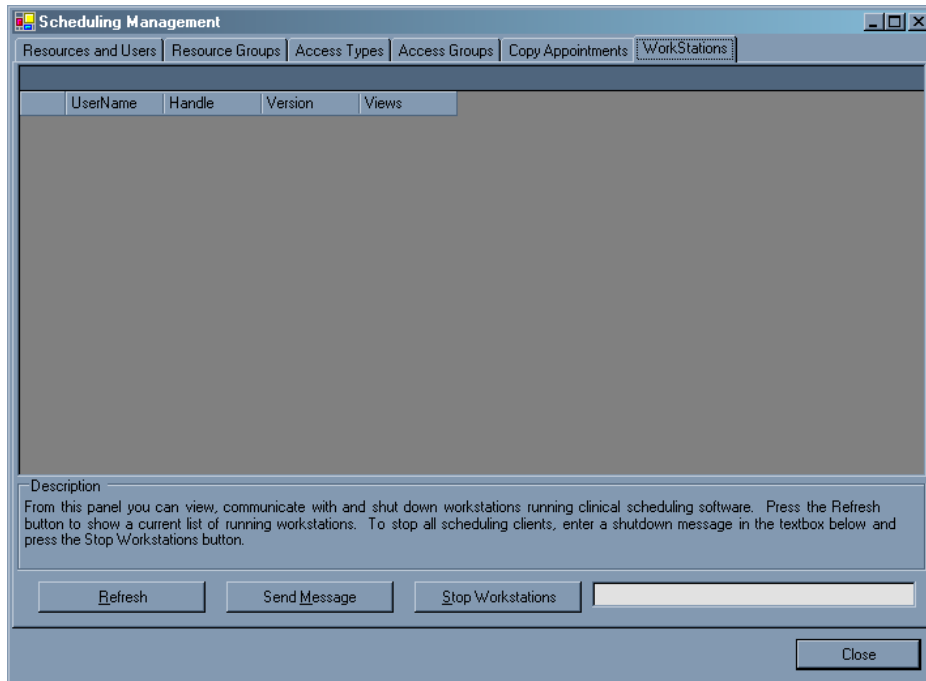
Figure 6-46: WorkStations tab

3. Click **Refresh** to display a list of the workstations at your site running the clinical scheduling application. Figure 6-47 is provided as an example.
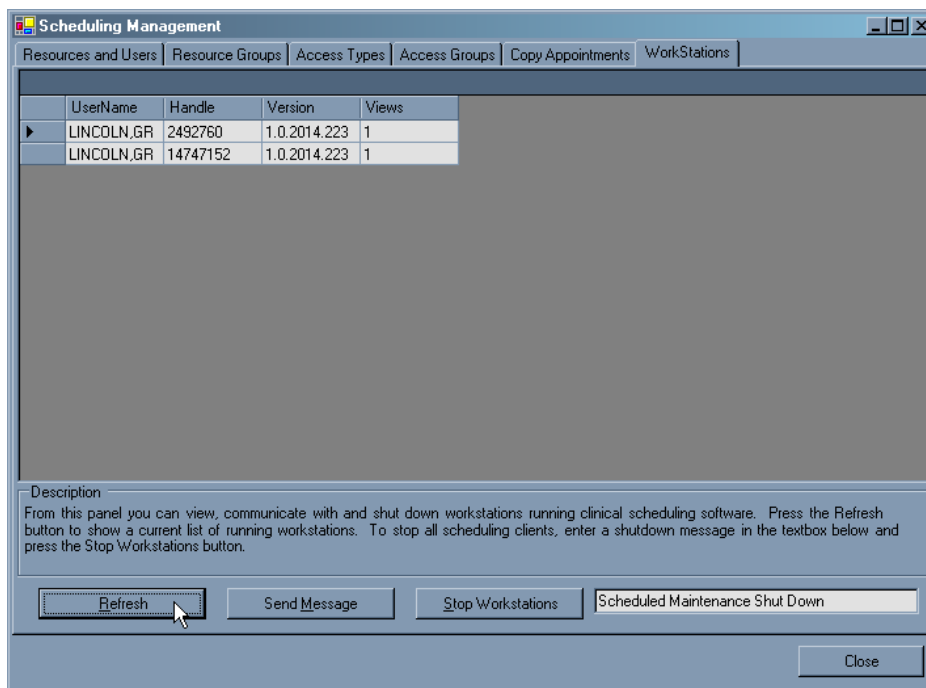
Figure 6-47: Refresh list of active workstations

This completes the procedure for determining which workstations are currently running this application. You may now select another task under this tab, choose another tab, or click **Close** to exit the Scheduling Management window. The section that follows provides instructions for sending a message to workstations currently running this application.

6.2.6.2   Send Message to Workstations

This section provides instructions for sending messages to other workstations on your network currently running this application. This is useful when you need to shutdown the network or anytime you need to communication with all user logged on to the application quickly and efficiently.

To send a message to workstations currently logged on to this application:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **WorkStations** tab in the Scheduling Management window.

3. Click **Refresh**. A list showing the workstations at your site currently running clinical scheduling application is updated. Figure 6-48 is provided as an example.
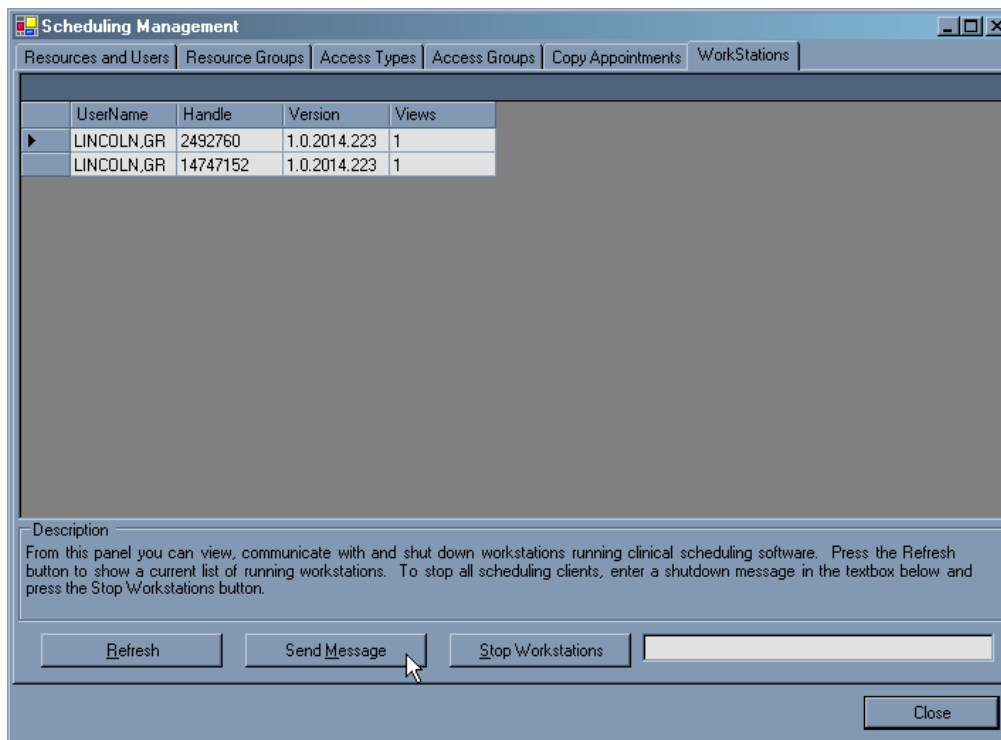
Figure 6-48: Send a message to scheduling workstations.

4. Click **Send Message**. The Send Message to Scheduling Client dialog box shown in Figure 6-49 opens.
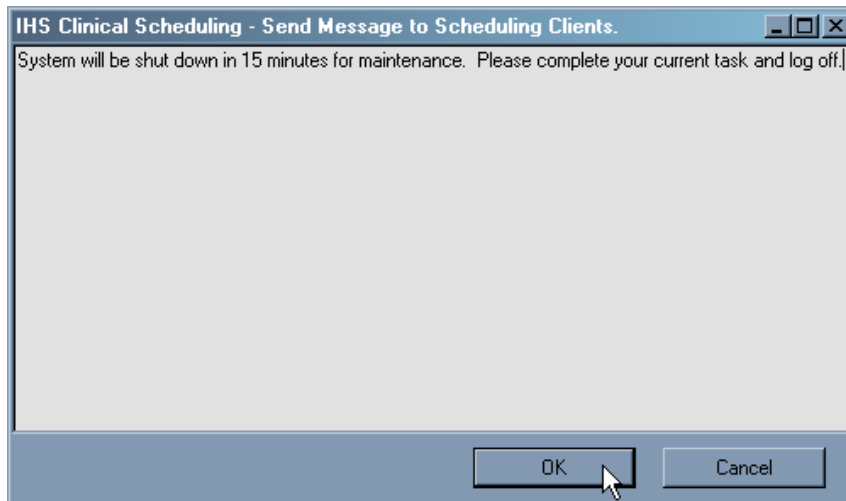
Figure 6-49: Send message to scheduling clients dialog box

5. Type the message you want to send in the text field and click **OK**. Figure 6-49 provides an example of a message.

    Your message is sent to all clients currently logged into this application. Figure 6-50 is provided as an example of a message other workstations receive. As the sender of the message, you do not receive the message on your system, nor do you receive any confirmation that the message was sent.
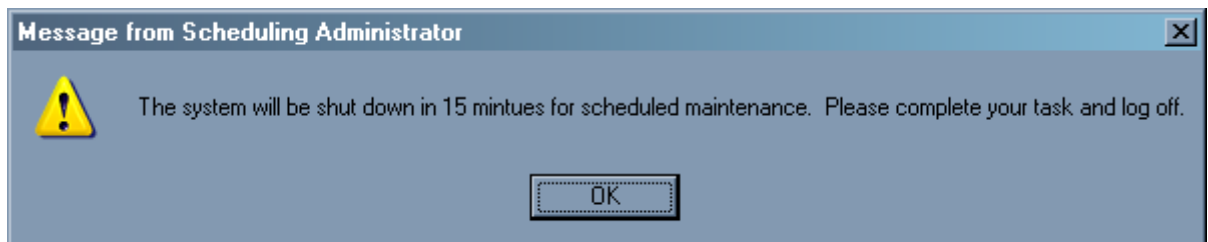
Figure 6-50: Sent message

This completes the instructions for sending a message to other workstations. You can now select another workstation task or Scheduling Management tab, or click **Close** to exit Scheduling Management. The section that follows provides instructions for stopping all workstations currently running this application.

6.2.6.3   Stop Workstations

This section provides instructions for stopping all workstations on your network currently running this application.

To stop all workstations currently running this application:

1. Select **Scheduling Management** from the **File** menu.

2. Click the **WorkStations** tab in the Scheduling Management window.

3. Click **Refresh**. A list of the workstations at your site running clinical scheduling software is displayed. Figure 6-51 is provided as an example.
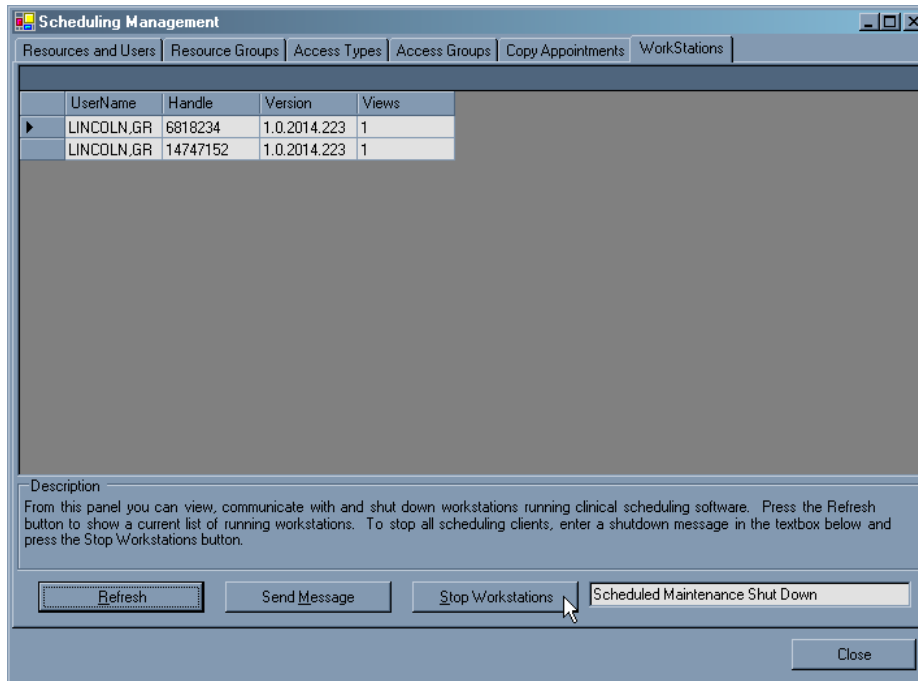
Figure 6-51: Stop workstations

4. Type a brief notification message in the text box next shown in Figure 6-51 and click **Stop Workstations**.

   The IHS Clinical Scheduling Client Shutdown confirmation dialog box shown in Figure 6-52 is displayed.
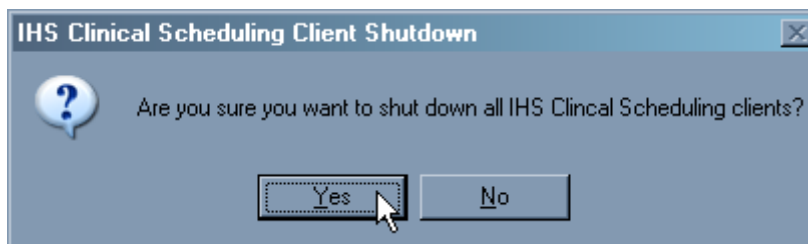
Figure 6-52: Shutdown confirmation dialog box

5. Click **Yes** to confirm shutdown or **No** to return to the Workstation tab without shutting down all clients currently running this application.

   Your message is sent to all clients currently logged into this application. Figure 6-50 is provided as an example of a message other workstations receive. As the sender of the message, you do not receive the message on your system, nor do you receive any confirmation that the message was sent.
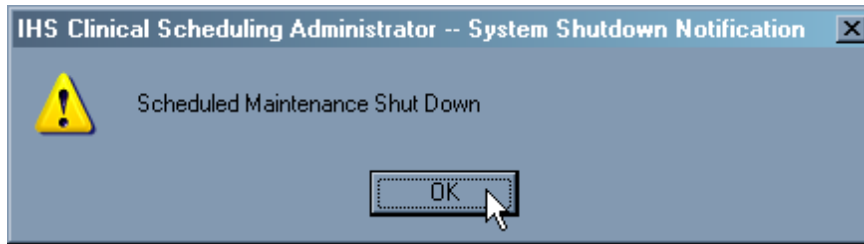
Figure 6-53: Shutdown notification message

> Users must click **OK** before the system can shutdown. All information entered into the system prior to the shutdown is saved.

> To verify that all systems have been shutdown, perform a Refresh (Section 6.2.6.1) to locate all systems still running the clinical scheduling software. As the System Administrator, your system should be the only one on the list.
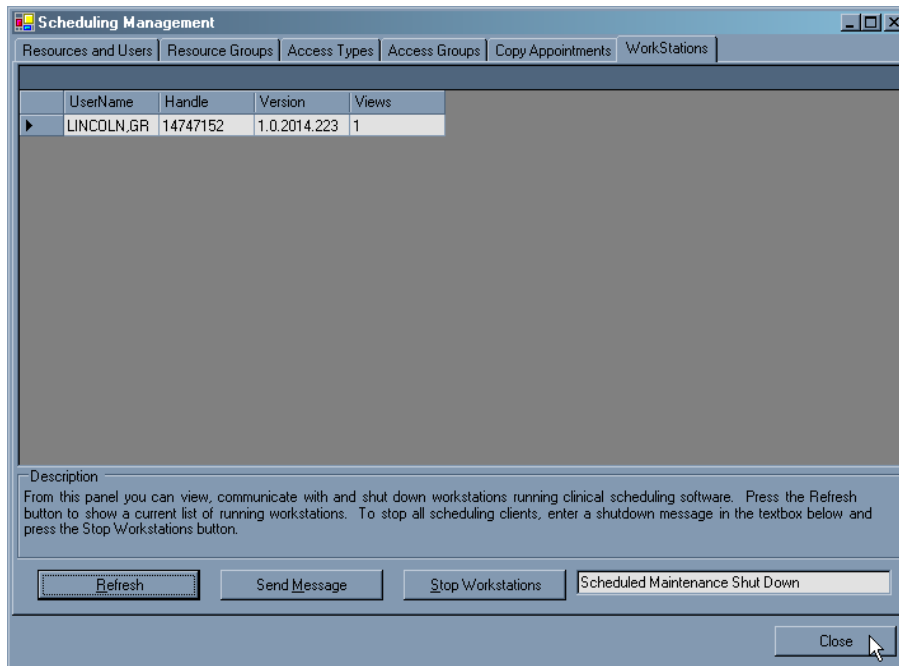
Figure 6-54: Verify system shutdown and close scheduling management

6. Click **Close** to exit Scheduling Management and the shutdown commences.

7.0   Rules of Behavior Overview

7.1   Background

The Indian Health Service (IHS) Information Technology (IT) Rules of Behavior (RoB) summarize the laws and guidance from various IHS, Department of Health and Human Services (HHS), and other Federal requirements. All users of IHS IT resources should be fully aware of, and abide by, IHS security policies as well as related federal policy contained in the Office of Management and Budget (OMB) Circular A-130, the Health Insurance Portability and Accountability Act (HIPAA), the Privacy Act, the Freedom of Information Act (FOIA), and IHS Records Management Policy and procedures. These guidelines should be used by all IHS organizational components as a basis for their own security plans and procedures.

These RoBs are founded on the principles described in the IHS published security policies and other regulatory documents such as the Code of Ethics for Government Employees, Office of Personnel Management regulations, OMB regulations and Standard of Conduct for Federal Employees, HHS policy and procedure and NIST Special Publications. Therefore, these RoBs carry the same responsibility for compliance as the official documents.

7.2   Purpose

The purpose of this SOP is to establish the RPMS RoBs. The RPMS RoBs are part of a comprehensive program to provide complete information security. These guidelines were established to hold users accountable for their actions and responsible for information security. The RPMS RoBs establish standards of behavior in recognition of the fact that knowledgeable users are the foundation of a successful security program. Users need to understand that taking personal responsibility for the security of their computer and the data it contains is an essential part of their job.

IHS has many computer systems to which IHS, Tribal, or Urban (I/T/U) employees must be given access in order to accomplish their jobs. As each user processes into an organization upon initial employment, changes jobs within the organization, or leaves the organization, there is an opportunity and responsibility for the organization to give or take away access to IT systems. It is at these junctions in the employment process that the rules pertaining to this access should be explained to and agreed upon by the employer and the employee. It is the responsibility of the users, supervisors, and computer systems administrators to follow the policies, regulations, and procedures to protect and assure that IT resources are appropriately protected when authorizing access of IHS automated information and systems.

7.3   Scope

This SOP applies to all IHS organizational components including, but not limited to, IHS headquarters offices and functions; all IHS area office locations and functional areas; all IHS service units and functions; all IHS funded or direct supported health facilities or locations; also to be included are all IHS partners' facilities as described below. The term *facilities* includes all Indian Health Urban locations where health care is provided or managed; and all IHS or Tribally owned or operated hospitals, clinics or all other locations where the health care services are provided, managed or otherwise supported.

- Facilities managed by Tribes or Tribal organizations that have retained IT shares with the IHS shall follow this SOP in accordance with their contracts or compacts.

- It is recommended that facilities managed by Tribes or Tribal organizations that have taken their Information Technology shares follow this SOP.

- Contractors' facilities shall follow this SOP in accordance with their interconnection agreements with IHS.

- For the purposes of this document, the use of the term *IHS* is intended to include any of the above facilities and employees of same.

- These RoB procedures apply to all IHS facilities and are in accordance with HHS reporting requirements and directives.

- This also includes individuals conducting business on behalf of the IHS through contractual relationships, unless they are specifically excluded under the terms of their contract.

The policies contained in this SOP apply to all RPMS IT activities including the equipment, procedures, and technologies that are employed in managing these activities. The policy includes work performed while tele-working, on travel, at other off-site locations, and at all IHS office locations.

8.0   Specific RPMS Rules of Behavior

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the rules of behavior (RoB) and will have to acknowledge them in accordance IHS policy prior to being granted access to a RPMS system. The RPMS system is a United States Department of Health and Human Services, Indian Health Service information system that is FOR OFFICIAL USE ONLY. The 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.

RPMS users must follow these RoB in addition to the RoB listed in the IHS General User Security Handbook and, if a privileged user, the RoB listed in the IHS Technical and Managerial Handbook.

> **IMPORTANT**: The RoBs listed in this document are specific to RPMS. For a listing of general RoB for all users, please see the IHS General User Security Handbook and for a listing of system administrators/managers rules, the IHS Technical and Managerial Handbook located at http://home.ihs.gov/ITSC-CIO/security/secpgm/ITproced.cfm.

8.1   All RPMS Users

In addition to these rules, each application may include additional RoBs, which may be defined within the individual application's documentation (for example: PCC, Dental, or Pharmacy).

8.1.1   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 non-public agency information.

- Be aware that personal use of information resources is authorized on a limited basis within the provisions Indian Health Manual Chapter 6 OMS Limited Personal Use of Information Technology Resources TN 03-05," August 6, 2003.

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 your 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 job or by divulging information to anyone not authorized to know that information.

8.1.2   Logging On To The System

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 5 successive failed login attempts within a specified time period (e.g., one hour).

8.1.3   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.

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 function they perform such as system administrator or application administrator.

- Acquire a written preauthorization in accordance with IHS polices and procedures prior to interconnection to or transferring data from RPMS.

8.1.4   Accountability

Users Shall:

- Behave in an ethical, technically proficient, informed, and trustworthy manner.

- Logout of the system whenever they leave the vicinity of their PC.

- 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.

- Shall abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior and IT information processes.

8.1.5   Confidentiality

Users Shall:

- Be aware of the sensitivity of electronic and hardcopy information, and protect it accordingly.

- Store hardcopy 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 HIPAA regulations to ensure patient confidentiality.

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.

8.1.6   Integrity

Users Shall:

- Protect your system 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, or database software, or both, and database tables.

- Comply with all copyright regulations and license agreements associated with RPMS software.

Users Shall Not:

- Violate Federal copyright laws.

- Install or use unauthorized software within the system libraries or folders.

- Use freeware, shareware, nor public domain software on (or with) your system without your manager's written permission and without scanning it for viruses first.

8.1.7   Passwords

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 and numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number and, if possible, a special character.

- 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 password immediately if password is seen, guessed, or otherwise compromised. Report compromised or suspected compromise to your ISSO.

- Keep user identifications (ID) and passwords confidential.

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 8 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.

8.1.8   Backups

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.

8.1.9   Reporting

Users Shall:

- Contact and inform your ISSO that you have identified an IT security incident and you will begin the reporting process by providing an IT Incident Reporting Form regarding this incident.

- Report security incidents as detailed in IHS SOP 05-03, Incident Handling Guide.

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.

8.1.10   Session Time Outs

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

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 your screen after some period of inactivity.

8.1.11   Hardware

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.

Users Shall Not:

- Do not eat or drink near system equipment.

8.1.12   Awareness

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.

8.1.13   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:

a) Are in writing;

b) Provide authentication of the remote user through the use of ID and password or other acceptable technical means;

c) Outline the work requirements and the security safeguards and procedures the employee is expected to follow;

d) Ensure adequate storage of files, removal and non-recovery of temporary files created in processing sensitive data, virus protection, intrusion detection, and provides physical security for government equipment and sensitive data; and

e) Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote Users Shall:

● Remotely access RPMS through a virtual private network (VPN) when ever 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 Users Shall Not:

● Disable any encryption established for network, internet and web browser communications.

8.2   RPMS Developers

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.

- Shall not access live production systems without obtaining appropriate written access, shall only retain that access for the shortest period possible to accomplish the task that requires the access.

- Shall observe separation of duties policies and procedures to the fullest extent possible.

- Shall 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.

- Shall use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.

- Shall follow industry best standards for systems they are assigned to develop or maintain; abide by all Department and Agency policies and procedures.

- Shall document and implement security processes whenever available.

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.

- Not release any sensitive agency or patient information.

8.3   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 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, 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 back up 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; abide by all Department and Agency policies and procedures.

Privileged 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.

- Not release any sensitive agency or patient information.

9.0 Specific BSDX RoBs

There are no specific RoBs that are applicable to BSDX.

10.0   Glossary

Term	Definition
Access Block	Access Blocks are color-coded representations of the amount of time allotted for a specific Access Type (or appointment).
Access Type	Access Types refer to the variety of different appointment types available in the RPMS system. Each type of appointment, such as routine physical, dental, walk-in, or other specific appointment type is an Access Type.
Access Group	Access Groups are categories of Access Types. Assigning Access Types to Access Groups makes it easier to schedule and search for certain types of appointments.
Appointment Date Selector	Appears in the upper right corner of the screen, below the Minimize, Maximize, and Exit buttons. The date selected is the starting date of the appointments currently displayed in the scheduling pane The range of appointments displayed can be 1-day, 5-day, or 7-day.
Archiving	The storing of historical or little-used data off-line (often on tape).
ASUFAC Number	Area Service Unit Facility; A unique identifier for each facility within IHS. A six-digit number comprised of 2 digits for Area, 2 digits for Service Unit, and 2 digits for Facility.
Client Window	Area on your screen that shows the work space for an application.
Default Facility	A user selects a facility identification to work with patients registered to that facility.
Health Record Number (HRN)	Each facility assigns a unique number within that facility to each patient. Each HRN with its facility identification "ASUFAC" make a unique identifier within all of IHS.
Internal Entry Number (IEN)	The number used to identify an entry within a file. Every record has a unique internal entry number.

Term	Definition
IRM	Information Resource Management. The IHS personnel responsible for information systems management and security.
Menu	An item on the menu bar of an MS Windows application that includes a list of commands for performing specific actions. For example, the File menu includes commands for opening, saving, and printing files.
Menu Bar	Appears below the "Name and location of current user. The available text menus are: File, Appointment, View, and Help.
Namespace	A unique set of 2 to 4 alpha characters that are assigned by the database administrator to a software application.
Official Registering Facility	A facility so designated that when HRNs are added/modified, those changes are sent to the central database. A Service Unit may have several satellites for which it is registering patients.
Pane	A rectangular division of a-screen window that contains information for the user. A window may have many panes.
Patient Care Component (PCC)	The central repository for data in the Resource and Patient Management System (RPMS).
Resource	The term Resources refers to any person, service, or clinic for which a patient can be scheduled. Resources can be physicians, diagnostic equipment (such as MRI, CT scan, ultrasound, and so on.), or specialty appointment slots, such as physical therapy. However, only Resources that are clinics can be linked to an RPMS PIMS schedule.
Resource Group	Resource Groups are categories of Resources that help to organize the variety of Resources available at each location.
Resource Group Pane	Appears at the far left of the screen, below the menu bar. Displays the available Resources.
Resource Name	Appears in the upper left side of the screen, immediately above the Time column. Displays the name of the

Term	Definition
	Resource currently active in the client window.
Time	Appears at the left side of the screen. Times are shown by hour and then by segment. They are listed in military time (for example 13:00 equals 1:00PM).
Title Bar	Shows user ID and facility location in the upper left corner of the screen

11.0   Contact Information

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

Phone: (505) 248-4371 or

(888) 830-7280

Fax: (505) 248-4297

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

Email: mailto:support@ihs.gov