

## **Package Optimizations:**

Listed are some things that your site should work on prior to EHR setup. Contact the OIT Helpdesk for assistance. [itschelp@ihs.gov](mailto:itschelp@ihs.gov)

### ***Adverse Reaction Tracking Package***

- Assign “GMRA” keys to Data Entry and utilize “ALG” mnemonic to document allergies (instead of using Problem List)
- Run “Allergy Reports” in PCC Data Entry and enter allergies into “Adverse Reaction Tracking Package” and remove from problem list
- Assign Pharmacist to review all new Allergies that will be entered using EHR. This person should learn the RPMS Adverse Reaction Tracking Package (how to verify allergies)

### ***Asthma Register Package***

- Setup Asthma Registry and update with new Asthma Patients
- Setup Medication Taxonomies – Consult with Pharmacy for medications used at your facility
- Add Asthma Supplement to Health Summary
- Run Asthma Quality Reports

### ***CHS/MIS***

- CHS and Medical Records staff should collaborate to identify a process to include notice that outside referral and diagnostic reports have been returned to the facility and are available for Provider review. This process may be included in notifications so that both the provider and the CHS staff will be informed of the completed contract health service item

### ***Diabetes Management Package***

- Setup Diabetes Registry and update with new Diabetic Patients
- Setup Lab Taxonomies – Consult with Lab Manager for names of lab tests at your facility
- Setup Medication Taxonomies – Consult with Pharmacy for medications used at your facility
- Add Diabetes Supplement to Health Summary
- Conduct “Automated Diabetes Audit” and compare to “Hand Audit” using same patient cohort

### ***Immunization Package***

- **Do not upgrade to Immunization 8.1 before EHR version 1.1 is released!**
- Assign BIZMENU and BIZ Patient Edit keys to all users who enter immunizations.
- Review all vaccines in the VAC table in the Immunization Package (Manager’s Menu) and make sure that your vaccines are active and inactivate those that you are no longer using
- Review the lot numbers for your vaccines (in the Manager’s Menu) and make sure that they are all in there and that the ones you are no longer using are inactive
- Decide whether Lot Numbers are required when entering an immunization. Set accordingly in the Site Parameters
- Determine who will enter new lot numbers into the Immunization Package when they arrive
- Teach users (nurses or providers) how to enter immunizations in the Immunization Package

## ***Laboratory Package***

- Review lab CPT codes (Lab menu> BLR Menu>CPT) and make sure all tests have a correct code
- Review Accession test groups (menu of tests) and make new ones to be used by clinics and wards for ordering tests
- Implement Ward Order Entry for Lab
- Develop a system for getting both “Point-of-Care” and “Reference Lab” results into the Lab Package
- Review all tests in the Laboratory Test file (#60) and inactivate the ones that you are not using (set the TYPE to NEITHER and delete synonyms)
- Review who holds the LRLAB key and take the key away from anyone not working in the lab
- Assign LOINC codes to the tests in the Laboratory Test file – contact OIT for assistance
- Order label printers for clinics, ER, and Inpatient to be used for EHR orders

## ***Pharmacy Package***

- Clean up drug file in preparation for the installation of Pharmacy 5/7
- Attend class on Pharmacy 5/7
- Start using Paperless Refill option

## ***Radiology package***

- Review Radiology Order menu (List of Radiology procedures) and inactivate procedures not being used
- Review Radiology Exams in the Radiology Package> Supervisor’s menu> Utility File Maintenance Menu> Procedure Edit Menu and make sure that the CPT codes are accurate and current
- Implement Ward Order Entry for Radiology
- Develop a system to review Radiology orders that need to be “overridden to completion” when Radiology report is not being entered
- Develop a system for getting Radiology Reports into Radiology Package

## ***RCIS Package***

- Identify the Referral process that is to be used in your facility (i.e., will the referrals be entered in the system by the Provider or CHS staff)
- In the RCIS Management Menu, turn on the RCIS link to the CHS application and the PCC link if appropriate
- Identify the template within the RCIS application that will be used by your facility to populate data on the Purchase Order (local category prompts)
- Review your RCIS site parameters and construct your parameters according to your local practices and data/report needs

## ***Scheduling Package***

- Set up a Scheduling clinic for each location in your facility
- Set Clinics to “Create a Visit at Check-in” in the Clinic Setup Menu
- Develop a process for all patients to check into their appointments or walk-in clinic
- Develop a process to “Check out” all patients from their appointments
- Set up clinic for “Chart Review” and “Telephone Call” – make sure they are set up with the correct Visit Service Category and NOT set up to create a visit at check-in

### ***Third Party Billing Package/Medical Records***

- Review the PCC Master Control file and make sure that all of the Packages are set to pass data to PCC
- Review the Third Party Billing Package site parameters
- Install Third Party Billing Patch 8.0 "Coding Queue"
- Turn on Coding Queue (PCC Data Entry Patch 8) at same time as "Paperless Refills" (Turn on Coding Queue in the PCC Master Control file)
- Review Health Summaries- is Adult Regular setup
- Develop process for tracking EHR visits so that data entry staff know which providers are using EHR

### ***Women's Health Package***

- Review and edit Site Parameters- turn on link to pass procedures to PCC, set up Case Managers
- Set up letters
- Decide if Pap Smears will be entered into the Lab Package and/or the Women's Health Package
- Develop a mechanism for getting pap smear reports back from Reference Lab and entering results into WH
- Develop mechanism for getting other reports (Mammograms, biopsies, etc) back and entering results into WH
- Develop procedure for printing letters and following up with delinquent reports.

### ***Things to do in EHR before setup and go-live***

- Develop Medication Quick Orders
- Develop Lab and Radiology Quick Orders
- Document Immunizations through EHR GUI (**Do not upgrade to Immunization 8.1 before EHR version 1.1 is released!**)
- Nurses utilize EHR GUI to document vital signs, health factors, patient education, allergies, and exams
- Physicians utilize EHR GUI to clean up problem lists and document allergies
- Begin using Notifications for lab and radiology. Stop printing paper lab results
- Edit PCC+ forms to include new merge fields and have nurses document vitals, health factors, patient education and exams before printing out PCC+ forms