

Indian Health Service

Discovering BPRM v4, the Basics and More...

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Introduction

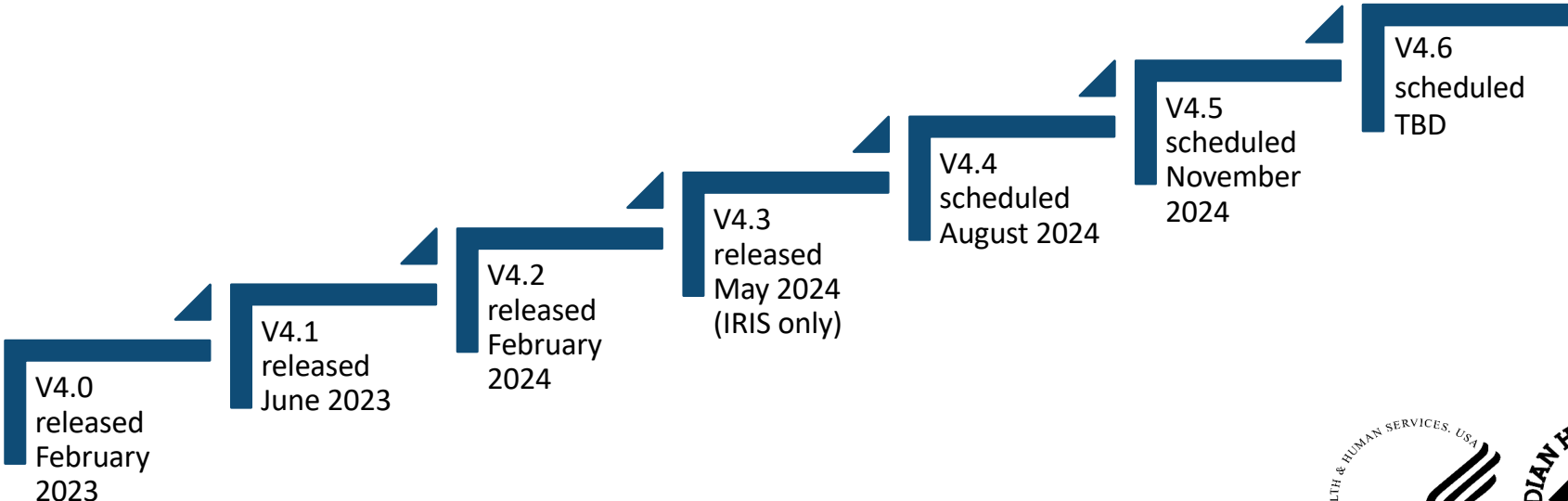
On February 28, 2023, the Practice Management Application Suite (BPRM v4) was released. This version release eliminated the need for MS Silverlight, which posed a significant security risk. Since then, 4 patches have been released, with one specifically for the IRIS upgrade. BPRM v4 Patch 4 was released on August 8, 2024.

Healthcare, Technology and Interoperability (HTI-1) is the current priority. As part of HTI-1, the US@ project requires the Patient Address to meet a standard format. The first phase was delivered in patch 4. The BPRM Registration application will provide a suggested format for the Patient Street Address. In later phases, the application will use a standard state/zip code file, include a bulk update to format historical address, and provide options for foreign or military addresses to meet the formatting requirement.

Other updates related to HTI-1 include updates to code sets to meet the USCDI v3 for Race/Ethnicity, Birth Sex, Pronouns, Sexual Orientation/Gender Identity, Patient Occupation/Occupation Industry.



BPRM Timeline



Application Overview

The Practice Management Application Suite (BPRM) is a browser-accessible graphical user interface (GUI). The graphical user interface simplifies record and patient management and allows for future expansion. BPRM is accessible using MS Edge and Google Chrome. Mozilla Firefox is not recommended.

Registration module

- Entry of new patient records and editing of existing patient records
- Enter/edit patient insurance
- Patient registration reports

Scheduling module

- Appointment management for new and existing patients
- Clinic Availability setup
- Scheduling reports

ADT module

- Patient admissions, discharges, and transfers management
- ADT reports



REGISTRATION



Registration - Workspace

Register Patient | Search | 2021 DEMO HOSPITAL (INST) | Logout

DEMO, PATIENTXD - DRIZZLE*
 HRN: 500008
 Eligibility Status: CHS & DIRECT
 PCP: DEMO, PROVIDER MN
 Last Updated: 07/08/2024 By (TOWNSEND, GAIL)
 Record Flags: Not Sensitive, No RHI, Active Insurance, Non Veteran

8/1/1986 (37 YRS) - MALE

Profile | Insurance | Prior Auth | Benefits Cases | Appointments

FOLLOW UP NEEDED (CLINICAL)

Demographics			
Demographics	Date of Birth 08-01-1986	Birth Sex MALE	Place of Birth
	Marital Status SEPARATED	Religion	Social Security Number XXX-XX-5008
Employment		Employer IHS AREA OFFICE, FULL-TIME	Spouse's Employer
Ethnicity			
	MEXICAN (SELF IDENTIFICATION)		
Race			
	AFRICAN (UNKNOWN)		
Languages			
	Primary ENGLISH	Preferred SPANISH	English Proficiency VERY WELL
	Other Languages SPANISH		
Migrant			
	Migrant Worker NO	Migrant Worker Type	Last Updated 11-30-2022

Demographics | Address/Email/Internet | Tribe and Eligibility Status | Legal Name | Preferred/Other Names | HRN/Record Disposition | SO/GI | Emergency Contact | Next of Kin | Family Information | Restricted Health Info | Death Information | Notice of Privacy Practices | PHR Access | Advance Directives | Veteran Status | Legal Documents | AOB/ROI | Record Flag | Notes

Registration

Print

Face Sheet | Patient Index Card | Wrist Band | Wellness Handout | Future Appointments

- Register Patient button
- Patient Search
- Division selection
- User Log Out/Application info
- Patient Banner
- Registration navigation panel
- Application tabs
- Flag Info
- Section view
- Print options



Registration – Register Patient

Register Patient

Name [required] Date of Birth [required] Birth Sex [required]

• Name is a required field. • Date of Birth is a required field. • Birth Sex is a required field.

Social Security Number [required] Reason For No SSN Please Select

• SSN is required. If no SSN, complete reason for no SSN. • Health Record Number is a required field.

Health Record Number [required]

• Health Record Number is a required field.

Place of Birth (City) Place of Birth (State) Please Select

Primary Language [required] Preferred Language [required] English Proficiency Please Select Interpreter Required Please Select

• Primary Language is a required field. • Preferred Language is Required

Other Language(s) [Add](#)

Street Address (Line 1)

City State Please Select Zip Code Residence Phone

Cell Phone Work Phone Other Phone Date Moved (Community) [required]

• Date Moved is a required field.

Current Community [required]

• Current Community is a required field.

Location Of Home

Employment Status Please Select Employer Search Marital Status Please Select Spouse Employer Search

Eligibility Status Please Select [required] Classification/Beneficiary Please Select [required]

• Eligibility Status is a required field. • Classification/Beneficiary is a required field.

Tribe of Membership [required] Indian Blood Quantum [required] Tribe Quantum

• Tribe of Membership is a required field. • Indian Blood Quantum is a required field.

Tribal Enrollment Number

Ethnicity Information

Ethnicity [required] Collection Method SELF IDENTIFICATION Remove Add

• Ethnicity is a required field.

Race Information

Race [required] Collection Method SELF IDENTIFICATION Remove Add

• Race is a required field.

Notice Of Privacy Practices

Date Received By Patient [required]

• Received By Patient is a required field.

Veteran Status

Is Veteran [required]

• Is Veteran is a required field.



Registration – Insurance Summary

The screenshot shows the 'Insurance' tab selected in the top navigation. The left sidebar has 'Insurance Coverage' highlighted. The main content area is titled 'Insurance Coverage' and contains a table with the following data:

INSURER	INSURER TYPE	SUBSCRIBER	COVERAGE TYPE	POLICY NUMBER	ELIGIBILITY BEGIN DATE	ELIGIBILITY END DATE	
ARIZONA BC/BS-BLUE PREFERRED P.O. BOX 13466, PHOENIX, AZ 85057 (602)864-4000	PRIVATE	DEMO,PATIENTXD		987987987	01-01-2020	12-31-2020	
AZ HEALTH CONCEPTS 7600 North 16th Street, #150, Phoenix, AZ 85020 (602)417-4706	MEDICAID	DEMO,PATIENTXD		1223456789	06-01-2024		
PRESBYTERIAN HEALTH PLAN PO BOX 27489, ALBUQUERQUE, NM 87125-7489 (505)923-5600	PRIVATE	DEMO,PATIENTXD		321321321	01-01-2021		
UNITED HEALTHCARE-PPO P.O. BOX 30551, SALT LAKE CITY, UT 84130-0551 (866)844-4864	PRIVATE	DEMO,PATIENTXD	SELF	9901123	01-01-2019	12-31-2019	Inactive Edit Delete

The dropdown menu on the right shows the following options: Medicare/Railroad, Medicaid, Medicare Part D, Private, Third Party Liability, Workmen's Comp, and Guarantor. The 'Guarantor' option is currently selected.

The insurance tab provides the user an option to add insurance information. The summary provides details of all the insurance the patient holds. There is an option to enter insurance by type, the search is narrowed down to the selected type. Recent updates includes Insurance phone number and a delete option.



Registration – Prior Authorization form

Prior Authorization

Encounter Date [required] 07-05-2024 📅 Authorization Type [required] OUTPATIENT ▼ Insurer ARIZONA BC/BS-BLUE PREFERRED

Authorization Status PENDING ▼ Authorization Number Authorization Date 📅 Authorized Visits

Service Category
PHYSICAL THERAPY

Encounter Notes
REQUEST FOR PHYSICAL THERAPY FOR KNEE REPLACEMENT

Authorizing Contact

Contact Date 07-05-2024 📅 Contact Person SMITH,SANDY Contact Phone 555-777-1234 Contact Fax

Contact Email
SANDY.SMITH@AZBCBS.COM

Notes
AWAITING APPROVAL FOR PHYSICAL THERAPY SERVICE

Use the Prior Authorization form to capture Authorization details, Insurance information and Contact information with option to collect detailed notes for Outpatient or Inpatient services.



Registration – Benefit Case form

Benefits Case - OPEN

Date Assigned [required] 07-08-2024	Assigned To [required] CLERK,REGISTRATION	Case Reason [required] Alternate Resource assistance	Case Number OP12345
Case Type OUTPATIENT	Case Worker CASE,WORKERONE	Date Completed --/--	
Case Notes PATIENT NEEDS ASSISTANCE WITH APPLICATION WITH MEDICAID. OBTAINED ALL INFORMATION FROM PATIENT REQUIRED FOR APPLICATION. APPLICATION SUBMITTED			
Application Type [required] RESOURCE VERIFICATION	Date Obtained [required] 07-08-2024	Received By CLERK,REGISTRATION	Application Status [required] PENDING
Submission Date [required] 07-08-2024	Submitted Via ONLINE/INTERNET	Submitted By CLERK,REGISTRATION	
Submission Reason APPLICATION COMPLETED ONLINE WITH PATIENT			

Discard Save

The Benefit Case form is used to track Patient Resource assistance. The form provides sections for Case details, Application details and Submission details. An entry, in any of the 3 sections, will trigger the required fields. The case notes section has been expanded with more note space. A mailman message will be sent to the Assigned user.



Registration – Appointment tab

The screenshot shows the 'Appointments' tab selected in the top navigation bar. On the left, a 'DATE' filter menu is open with 'All' selected. The main content area displays a table of appointments. A context menu is open over the table, listing actions: Check-In Appointment, Cancel Appointment, No-Show Appointment, View Appointment Detail, Print Routing Slip, Print Medication Profile, and Print Pre Appointment Letter.

APPOINTMENT DATE/LENGTH	CLINIC / DIVISION	STATUS / TYPE	CREATED ON/BY	CHECKIN TIME/BY	CHECKOUT TIME/BY	NOSHOW-CANCEL TIME/BY	COMMENTS
07-24-2024 01:00 PM 30 (mins)	DEMO CLINIC 2021 DEMO HOSPITAL (INST)	SCHEDULED REGULAR	07-08-2024 02:57 PM TOWNSEND,GAIL				immunization
07-17-2024 11:00 AM 20 (mins)	BLUE CLINIC 2021 DEMO HOSPITAL (INST)	SCHEDULED REGULAR	07-08-2024 02:44 PM TOWNSEND,GAIL				appt with Dr D
07-03-2024 10:20 AM 20 (mins)	BLUE CLINIC 2021 DEMO HOSPITAL (INST)	CHECKED IN REGULAR	07-08-2024 02:51 PM TOWNSEND,GAIL	02:51 PM TOWNSEN			
07-01-2024 09:00 AM 20 (mins)	BLUE CLINIC 2021 DEMO HOSPITAL (INST)	CANCELLED BY CLINIC REGULAR	07-08-2024 02:45 PM TOWNSEND,GAIL			07-08-2024 02:52 PM TOWNSEND,GAIL	knee surgery p

The appointment tab provides quick access to view Patient’s appointments. The Appointment Tab requires a security key. All users have the ability to Print a routing slip, an appointment letter or medication profile. If the user has access to the clinic where the appointment is scheduled, then the user can Check-in, Check-out, Cancel, etc. and View Appointment Detail.



REGISTRATION DEMO



ADMISSION/DISCHARGE/ TRANSFER (ADT)



ADT - Workspace

The screenshot displays the ADT Workspace interface. On the left, a 'WARD' selection menu is visible with 'EAST GENMED' and 'GENERAL MEDICINE' selected. The main area is divided into two columns: 'EAST GENMED' (Open Beds: 17) and 'GENERAL MEDICINE' (Open Beds: 1). At the top, there are navigation tabs: 'Ward Workspace', 'List View', 'Incomplete Chart', 'Discharge List', 'Admit', 'Transfer', and 'Discharge'. A status bar at the top right shows filters: 'NO BED ASSIGNED', 'OBSERVATION', 'OCCUPIED', 'AVAILABLE', and 'OUT OF SERVICE'. The 'EAST GENMED' column shows a patient 'EQIEIGHTFOURFOUR, TAA (844844) - 71 ...' with status 'NO BED ASSIGNED' and a date '05-28-2024 03:36 PM'. Below this, a table lists beds E102-B, E101-A, E101-B, E103-B, and E105-A, all with 'NO DESCRIPTION'. The 'GENERAL MEDICINE' column shows a patient 'DEMO, ADULT A (76907) - 54 YRS' with status 'NO BED ASSIGNED' and a date '06-11-2024 02:52 PM'. Below this, a table lists beds E101-A, E103-A, E104-B, and E105-B, all with 'NO DESCRIPTION'. A context menu is open over the 'DEMO, ADULT A' patient, listing actions: 'Transfer Ward', 'Transfer Bed', 'Transfer Provider', 'Transfer Treating Specialty', 'Cancel Admission', 'Discharge Patient', 'View Admission Detail', 'Seriously Ill', 'Do Not Resuscitate', 'Print A Sheet', 'Print Wrist Band', and 'Select Patient in EHR'.

The Ward workspace provides the user tools to manage Admission, Discharge and Transfers. Ward Selection is specific to a site. Patients are sorted by No Beds Assigned, Observations, Occupied then Available beds are displayed. A context menu is displayed based on an occupied bed shown in this example. A user may right click on an Available bed to get an Admit option in the context menu.



ADT – List View

Ward Workspace | **List View** | Incomplete Chart | Discharge List | Admit | Transfer | Discharge

PATIENT CONDITION

All

SORT BY

Admission Date Dsc

- Patient Name
- Ward Name
- Admission Date Asc
- Admission Date Dsc
- Length of Stay Asc
- Length of Stay Dsc
- MEDICAL WARD 16
- MEDICAL WEST
- NEWBORN ICU
- PEDS (B&T) F6
- POST SURGERY
- SOUTH OBGYN
- SWING BED
- WEST

Admission List

PATIENT	ADMISSION DATE	WARD	ROOM-BED	ATTENDING	SERVICE	LENGTH OF STAY	INSURANCE
DEMO,ADULT A 01-01-1970 - 76907	6/11/2024 2:52:12 PM	GENERAL MEDICINE		DEMO,DOCTOR	ED BOARDER OBSERVATION	28	IHS
EQIEIGHTFOURFOUR, TAA 03-27-1953 - 844844	5/28/2024 3:36:00 PM	EAST GENMED		DEMO,DOCTOR	ED BOARDER OBSERVATION	42	MCR
DEMO,FSIX FIVE 01-01-1960 - 65421	4/30/2024 10:12:53 AM	GENERAL MEDICINE	CZ CTW-6	DEMO,DOCTOR	GENERAL SURGERY	70	IHS
DEMO,FSIX UNKNOWN 06-12-1970 - 117976	4/12/2024 9:58:40 AM	GENERAL MEDICINE	CZ CTW-5	DEMO,DOCTOR	GENERAL MEDICINE	88	IHS

The Ward list view provides user other sorting options by Ward. A user can also perform the same actions as in the Ward Workspace with a right click on the patient for the context menu. Details of the admission are display in a list view including Length of Stay and Insurance.



ADT - Discharges

Ward Workspace | List View | Incomplete Chart | **Discharge List** | Admit | Transfer | Discharge

Discharge List

PATIENT	ADMISSION DATE	DISCHARGE DATE	DISCHARGE STATUS/ DISCHARGE TYPE	WARD AT DISCHARGE	LENGTH OF STAY
DEMO,ADULT A 01-01-1970 - 76907	6/11/2024 2:52:12 PM	7/9/2024 3:39:00 PM	DISCHARGED HOME REGULAR DISCHARGE	GENERAL MEDICINE	28
DEMO,PATIENTXD - DRIZZLE* 08-01-1986 - 500008	7/1/2024 3:32:00 PM	7/9/2024 3:39:00 PM	DISCHARGED HOME REGULAR DISCHARGE	EAST GENMED	8
DEMO,PATIENTXG 06-20-1998 - 500009	6/3/2024 3:35:00 PM	7/9/2024 3:39:00 PM	TRANSFERRED GEN HOSPITAL TRANSFERRED (PHOENIX REG MEDICAL CENTER)	EAST GENMED	36
	5/16/2024 2:57:00 PM	6/25/2024 9:36:00 AM	TRANSFERRED GEN HOSPITAL TRANSFERRED (FLAGSTAFF MEDICAL CENTER)	EAST GENMED	40
	6/25/2024 10:02:00 AM	6/26/2024 3:46:00 PM	TRANSFERRED GEN HOSPITAL TRANSFERRED (FLAGSTAFF MEDICAL CENTER)	EAST GENMED	1

Cancel Discharge
View Admission Detail
View Incomplete Chart
Print A-Sheet
Print Wrist Band
Select Patient in EHR

< 1 >

The Discharge List displays patient discharged sort by today, last 14 days, 30 days, or All. The List view includes additional options to Cancel Discharge and View Incomplete Chart. A user that may have incorrectly discharged a patient can cancel the discharge. The View Incomplete chart will create an incomplete chart for tracking chart deficiencies by provider.

ADT – Incomplete Chart

Chart Detail

Insurance: IHS Category: HOSPITALIZATION Service: GENERAL MEDICINE Discharge Ward: EAST GENMED

Action(s) Action ▾

Ready to Code Date: 07-12-2024 Remove

Chart Deficiencies Add

PROVIDER	CHART DEFICIENCY	DATE RESOLVED	DATE DELINQUENT	DATE DELETED	RESOLUTION STATUS
DEMO,PROVIDER MN	A SHEET		08-11-2024		Pending Resolve Delete Edit

Discard Save

An Incomplete Chart is created from the Discharge List. The user can select Add to create and assign deficiencies to a provider. Actions are also available for flagging the chart. Sites can create their own deficiencies in the Setting module.



ADT – Incomplete Chart

Ward Workspace | List View | **Incomplete Chart** | Discharge List | Admit | Transfer ▾ | Discharge

Incomplete Charts

PATIENT	CATEGORY / SERVICE / INSURANCE	DISCHARGE WARD / DATE	PROVIDER	CHART DEFICIENCY	STATUS/DATE	
DEMO,ADULT A 01-01-1970 - 76907	OBSERVATION ED BOARDER OBSERVATION IHS	07-09-2024 0 Days ago	DEMO, DOCTOR DEMO, PROVIDER MN	A SHEET DICT NARR SUMMARY	Pending Pending	Edit
DEMO,PATIENTXD 08-01-1986 - 500008	HOSPITALIZATION GENERAL MEDICINE MCD/PVT	EAST GENMED 07-09-2024 0 Days ago	DEMO, PROVIDER MN DEMO, PROVIDER MN PROVIDER, OUTSIDE	A SHEET HISTORY & PHYSICAL NURSING NOTES	Pending Pending Pending	Edit
DEMO,PATIENTXG 06-20-1998 - 500009	HOSPITALIZATION GENERAL MEDICINE MCD	EAST GENMED 07-09-2024 0 Days ago	PROVIDER, FIVE DEMO, PROVIDER MN	CONSULTATION REPORT DICT NARR SUMMARY	Pending Pending	Edit

Showing 1 to 3 of 3 results

< 1 >

Sorting options are available to narrow down the list. Once the Incomplete chart is created, the user can select edit to add additional deficiencies and assign to a provider. The user can manage deficiencies with edit/delete/resolve options. Actions are also available for flagging the chart. A report is available in the Reports module.

ADT DEMO



SCHEDULING



Scheduling – Main Functionality

- **The User can manage Patient Appointments using the following options.**
 - The Scheduling module contains a mini-Reg option so that the user can register patients, if necessary.
 - Scheduling options include Schedule Appointment, Walk In, Parallel Appointment, Copy, Copy to Reschedule and Add to Waiting List.
 - Appointment Management options include Check-In, Check-Out, Cancel, No-Show (including Undos) and View Appointment Detail.
 - The user can print items including the Routing Slip, Wellness Handout, Medication Profile, Wrist Band, Individual Letter and Future Appointments.
 - The user can create custom views by Day, Work Week, Week and Month. List View is also available with various filters and sorting options.
 - Zoom and Full Screen functionality allows the user to customize the Scheduling Workspace even further.
- **The User can manage Clinic Waiting List(s).**
 - The user can add, edit, remove and schedule patients using the Clinic Waiting List.
 - The user can Drag and Drop a patient entry from the Waiting List into Scheduling Workspace.
- **The User can print Bulk Letters and various Reports.**
 - Bulk Letters are available for printing including the Pre-Appointment Letter, Cancel Letter and No-Show Letter.
- **The User can manage Clinic data and Clinic Availability.**
 - The user can set up Clinic Availability using pre-defined Access Types and Block various slots, if necessary.
- **The User can manage additional Settings including Access Types, Holidays, Letter Templates and Resource Groups.**



Scheduling – Main Workspace

Scheduling Toolbar

Full Screen Today Day Work Week Week Month List Waiting List Slots Letters Zoom Clincs SCHEDULED CHECKED IN CHECKED OUT CANCELLED NO SHOW

July 2024

SU	MO	TU	WE	TH	FR	SA
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

RESOURCE GROUP

CLINICS

- AAA CLINIC
- ADULT CLINIC
- BLUE CLINIC
- DEMO CLINIC
- DEMO CLINIC - PROHIBITED
- DIABETIC CLINIC
- PARTNERSHIP CLINIC

Selection/Filtering Pane

- Registration
- ADT
- Scheduling
- Settings
- Reports

PARTNERSHIP CLINIC

	Mon 01	Tue 02	Wed 03	Thu 04	Fri 05
08 AM	PEDIATRIC CLINIC	TREATMENT DOCTOR	PEDIATRIC CLINIC	TREATMENT DOCTOR	DR. DEMO
09 AM	APPOINTMENT		NURSE CLINIC		
10 AM		ACUTE CARE		DIABETIC CLINIC	
11 AM					
12 PM	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
01 PM	NURSE CLINIC	DR. DEMO	APPOINTMENT	PEDS URGENT CARE	CLINIC SEMINAR
02 PM					
03 PM		SAME DAY		ACUTE CARE	
4:22 PM					

Status Panel

Workspace View



Scheduling – Main Workspace with Waiting List

The screenshot displays a scheduling software interface for a clinic. The main workspace is a weekly calendar for 'PARTNERSHIP CLINIC' from Sunday, July 7th to Saturday, July 13th. The calendar is color-coded by time slot and clinic type. A red box highlights the 'Waiting List' panel on the right, which lists patients with their names, phone numbers, recall dates, and reasons for being on the list.

Time Slot	Sun 07	Mon 08	Tue 09	Wed 10	Thu 11	Fri 12	Sat 13
08 AM		PEDIATRIC CLINIC	TREATMENT DOCTOR	PEDIATRIC CLINIC	TREATMENT DOCTOR	DR. DEMO	
09 AM		APPOINTMENT		NURSE CLINIC			
10 AM			ACUTE CARE		DIABETIC CLINIC		
11 AM							
12 PM		LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	
01 PM		NURSE CLINIC	DR. DEMO	APPOINTMENT	PEDS URGENT CARE	CLINIC SEMINAR	

Waiting List - PARTNERSHIP CLINIC

- DEMO, ADDIE M (123400)** HIGH
Phone No: 555-123-4567 Recall Date: 07-01-2024
Added By: WOMACK, TAMMY Added On: 07-01-2024
Reason: NEW PATIENT TO WAIT LIST
- DEMO, ALLISON - MISTYLOU* (124255)** MIDDLE
Phone No: 505-555-1234 Recall Date: 07-01-2024
Added By: WOMACK, TAMMY Added On: 07-01-2024
Reason: PROVIDER SCHEDULE UNKNOWN
Patient needs labs.
- DEMO, DEBBIE (989898)** MIDDLE
Phone No: 301-443-0898 Recall Date: 07-01-2024
Added By: WOMACK, TAMMY Added On: 07-01-2024
Reason: PROVIDER SCHEDULE UNKNOWN
Patient needs wheelchair assistance.
- DEMO, JAMES (999899)** MIDDLE
Phone No: 526-558-1234 Recall Date: 07-09-2024
Added By: WOMACK, TAMMY Added On: 07-01-2024
Reason: NEW PATIENT TO WAIT LIST
- DEMO, ELAINE NATASHA (987645)** HIGH
Phone No: Recall Date: 07-11-2024
Added By: WOMACK, TAMMY Added On: 07-01-2024
Reason: NEW PATIENT TO WAIT LIST
Patient is new to area.



Scheduling – Waiting List using list format

Day | Work Week | Week | Month | List | **Waiting List** | Search Slots | Letters | Clinics | Refresh

CASE STATUS: Open

RECALL DATE: All

SORT BY: Recall Date

CLINIC:

- AAA CLINIC
- BLUE CLINIC
- DEMO CLINIC
- DEMO CLINIC - PROHIBITED
- DEN PA AUSTIN
- DEN PA JUDD
- DEN PA SMITH
- PA AUDIOLOGY
- PA CARDIOLOGY
- PARTNERSHIP CLINIC

Registration | ADT | **Scheduling** | Settings

Waiting List Filter by Patient Add Waiting List

PATIENT	CLINIC / PROVIDER	DATE ADDED	RECALL DATE	PRIORITY / STATUS	COMMENTS / RESOLUTION	DATE REMOVED
DEMO,ADDIE M (123400) 555-123-4567	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	HIGH OPEN		
DEMO,ALLISON - MISTYLOU* (124255) 505-555-1234	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	MIDDLE OPEN	Patient needs labs.	
DEMO,DEBBIE (989898) 301-443-0898	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	MIDDLE OPEN	Patient needs wheelchair assistance.	
DEMO,JAMES (999899) 526-558-1234	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-09-2024	MIDDLE OPEN		
DEMO,ELAINE NATASHA (987645)	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-11-2024	HIGH OPEN	Patient is new to area.	
DEMO,PATIENTK - KATIE* (999103)	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-11-2024	HIGH OPEN		
DEMO,BABY NEWBORN (987699)	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-15-2024	HIGH OPEN	Patient needs medication refills.	
DEMO,CHERYL NADINE (135548) 555-555-6831	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-16-2024	MIDDLE OPEN		
DEMO,LIBBY (870000)	PARTNERSHIP CLINIC	07-01-2024	07-18-2024	MIDDLE		

Showing 1 to 10 of 15 results



Scheduling Reports

- **Appointments Requiring Action Report:** Detailed information about patient appointments for a clinic(s) within a date range
- **Cancelled Appointment Report:** Shows information for cancelled appointments (by patient or clinic) for a clinic(s) within a date range
- **Clinic Schedule Report:** Shows appointments for a clinic(s) within a date range
- **Clinic Workload Report:** Shows information for appointments where on scheduled/unscheduled appointments for a clinic(s) within a date range
- **No Show Report:** Shows information for appointments where patient was a no-show for a clinic(s) within a date range
- **Waiting List Report:** Shows appointment details on the waiting list for a clinic(s) within a date range
- **Print Letters:** Allows bulk letter printings for a clinic within a date range (Pre-Appt, Clinic Cancel, Appt Cancel, No-Show)



Scheduling – Clinic Availability

Back

PARTNERSHIP CLINIC
Applicable from: 08-04-2024 to forever

August 2024

SU	MO	TU	WE	TH	FR	SA
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Today

- LUNCH
- APPOINTMENT
- ACUTE CARE
- TREATMENT DOCTOR
- NURSE CLINIC
- PEDIATRIC CLINIC
- SAME DAY
- DR. DEMO
- DIABETIC CLINIC
- PEDS URGENT CARE

	Sun 04	Mon 05	Tue 06	Wed 07	Thu 08	Fri 09	Sat 10
08 AM		PEDIATRIC CLINIC Slots: 3	TREATMENT DOCTOR Slots: 4	PEDIATRIC CLINIC Slots: 3	TREATMENT DOCTOR Slots: 4	DR. DEMO Slots: 3	
09 AM		APPOINTMENT Slots: 4		NURSE CLINIC Slots: 4			
10 AM			ACUTE CARE Slots: 4		DIABETIC CLINIC Slots: 4		
11 AM							
12 PM		LUNCH Note:	LUNCH Note:	LUNCH Note:	LUNCH Note:	LUNCH Note:	
01 PM		NURSE CLINIC Slots: 5	DR. DEMO Slots: 4	APPOINTMENT Slots: 5	PEDS URGENT CARE Slots: 4	CLINIC SEMINAR Note: Various topics will be available for discussion.	
02 PM							
03 PM			SAME DAY Slots: 4		ACUTE CARE Slots: 4		
04 PM							
05 PM							



SCHEDULING DEMO



Scheduling Demonstration

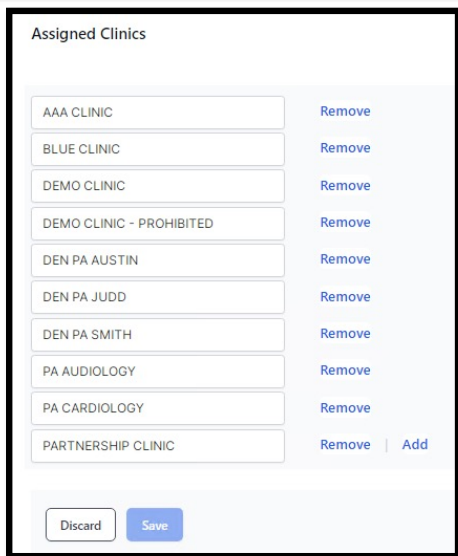
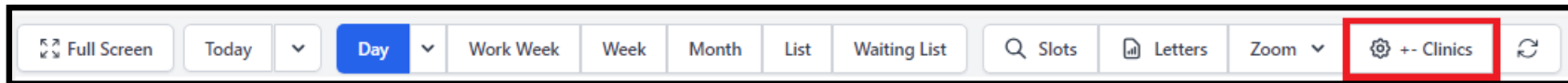
By the end of this Demo, you will understand the following topics:

- Assign/Remove Clinics
- Manage Workspace View
- Create Patient Appointment
- Mini-Registration
- Appointment Status Types
- Manage Patient Appointments
- Appointment Printings
- Appointment “Jumps”
- Workspace Waiting List
- Waiting List from List View
- Waiting List: Edit/Remove
- Waiting List: Schedule (Search Slots)
- Print Letters
- Scheduling Reports
- Manage Clinic Settings/Availability



Scheduling – Assign/Remove Clinics

Use the +- Clinics button to add and remove Clinics from the Clinic Panel.

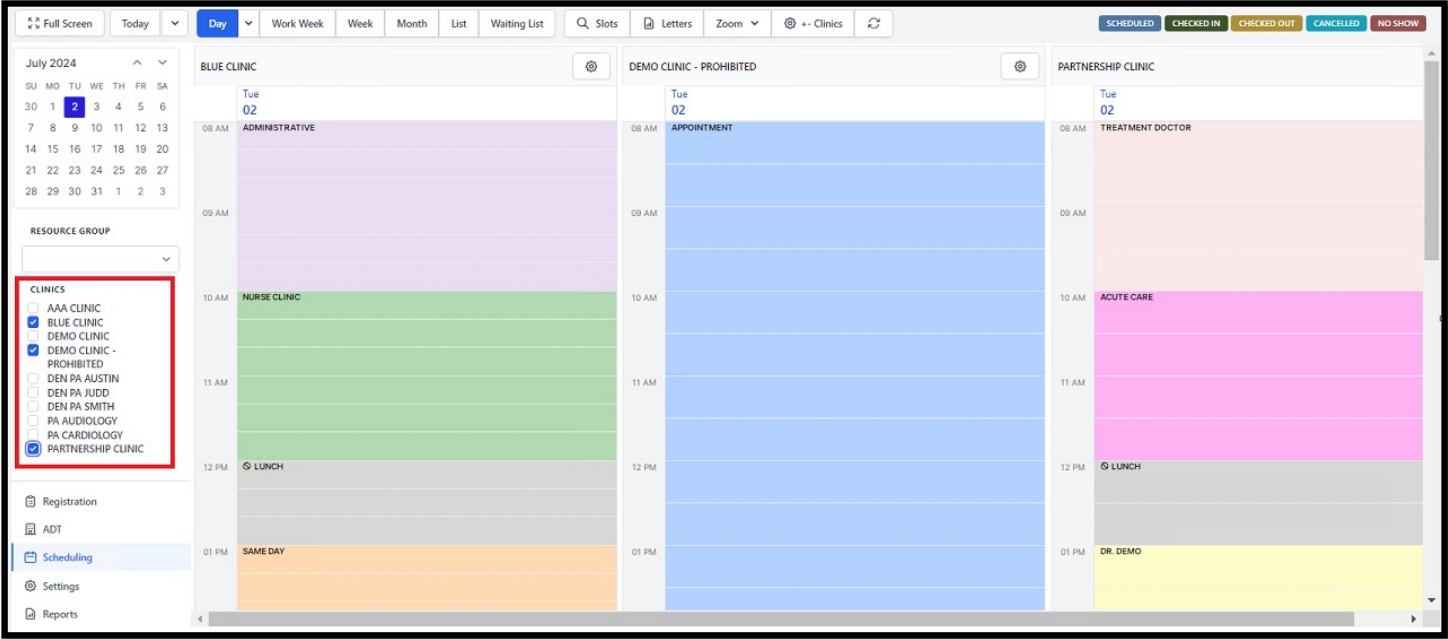


NOTE: Clinics available for selection include PUBLIC Clinics and Clinics where the user is listed as a Clinic User.



Scheduling – Manage Workspace View

Use the **Clinic Panel** to manually select an individual Clinic(s) to display in the Workspace.



Scheduling – Manage Workspace View (cont'd)

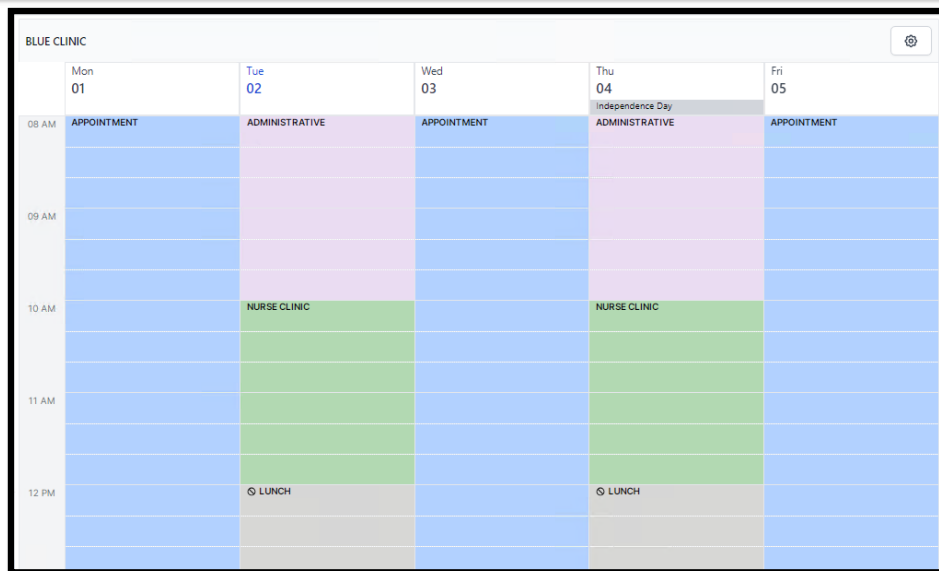
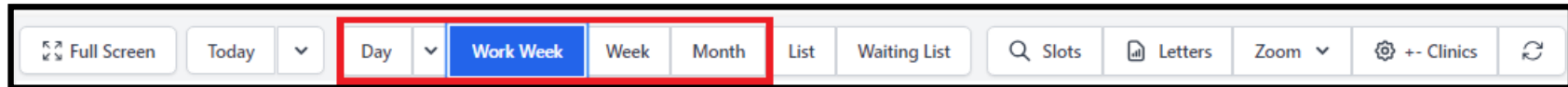
Use the **Resource Group** to select multiple Clinics within the group to display in the Workspace.

The screenshot displays a scheduling software interface for July 2024. The top navigation bar includes options like 'Full Screen', 'Today', 'Day', 'Work Week', 'Week', 'Month', 'List', 'Waiting List', 'Slots', 'Letters', 'Zoom', and 'Clinics'. A status bar at the top right shows 'SCHEDULED', 'CHECKED IN', 'CHECKED OUT', 'CANCELLED', and 'NO SHOW'. The main workspace is divided into three columns: BLUE CLINIC, DEMO CLINIC, and PARTNERSHIP CLINIC. On the left, a 'RESOURCE GROUP' dropdown menu is highlighted with a red box, showing 'PARTNERSHIP GROUP' selected. Below it, a list of clinics is shown with checkboxes: AAA CLINIC, BLUE CLINIC, DEMO CLINIC, DEMO CLINIC - PROHIBITED, DEN PA AUSTIN, DEN PA JUDD, DEN PA SMITH, PA AUDIOLOGY, PA CARDIOLOGY, and PARTNERSHIP CLINIC. The clinic columns show various appointment slots and activities like 'ADMINISTRATIVE', 'NURSE CLINIC', 'LUNCH', and 'SAME DAY'.



Scheduling – Manage Workspace View (cont'd)

Use the **Day**, **Work Week**, **Week**, **Month** buttons to display Clinic schedule(s) using the desired time frame.

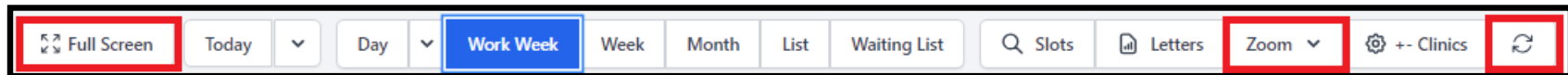


NOTE: Month view is limited to display one Clinic schedule at a time whereas the other views allow the user to display multiple Clinic schedules.

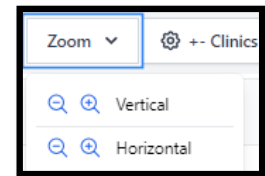


Scheduling – Manage Workspace View (cont'd)

Use the **Full Screen**, **Zoom**, **Refresh** buttons to enhance the Workspace display.



- Click the **Full Screen** button to view clinic schedules without the Scheduling Toolbar, and the Selection and Filtering pane. Click the control again (top-right corner) to return to normal view.
- **Zoom** button allows the user to zoom in and out in both Vertical and Horizontal directions.
- Use the **Refresh** button to refresh all clinic schedules to ensure the latest changes are displayed. It is recommended to use this refresh option versus the web browser refresh.



Scheduling – Create Patient Appointment

- Right click on a blank appointment slot and click **Schedule** to create a patient appointment.
- Enter patient name from the search results list.
- BPRM will fill in Schedule Date/Time from the selected appointment slot.
- If the clinic is set up with **Variable Appointment Length**, the user may change the Appointment Length. If the clinic does not allow for Variable Appointments Lengths, Appointment Length will NOT be editable and will be set to the clinic’s default length.
- Enter **Other Info** as needed then click **Save** to Save the appointment.

Schedule Appointment - PARTNERSHIP CLINIC

DEMO, MARY JANE
07-04-1977 (46 YRS) - FEMALE
PCP:

HRN: 852852
Eligibility Status: DIRECT ONLY
Last Updated On: 07-17-2020

Schedule Date: 07-01-2024
Schedule Time: 10:00 AM
Appointment Length: 30 [required]

Other Info
Patient needs medication refills.

Discard Save

Appt tile once Saved

DEMO, MARY JANE (852852)
☎ 505-555-1234
Patient needs medication refills.



Scheduling – Create Patient Appt (cont'd)

Other types of Patient Appointments include:

- **Parallel Appointment** – Right click on existing appointment then select **Schedule Parallel** to create another patient appointment for the same day/time. This option works exactly like creating a regular appointment.
- **Walk In Appointment** – Right click on an appointment slot and click **Walk In** to create a patient appointment. This option is only available for the current date (TODAY only). The patient is Checked-In with this option.

Walkin Appointment - PARTNERSHIP CLINIC

TEST,SEAN
11-28-2000 (23 YRS) - FEMALE
PCP:

HRN: 852366
Eligibility Status:
Last Updated On: 12-19-2022

Schedule Date: 07-02-2024
Schedule Time: 09:00 AM
Appointment Length: 30 [required]

Check-In Date: 07-02-2024
Check-In Time: 05:26 PM [required]
Provider: DEMO,DOCTOR [required]

Clinic Stop Code: GENERAL PREVENTIVE [required] Print Routing Slip:

Other Info: Patient is allergic to peanuts.

Discard Save

Appt tile once Saved. NOTE the orange bar on left indicating a Walk-In appt.

TEST,SEAN (852366)
📞 588-625-1488
Patient is allergic to peanuts.



Scheduling – Mini-Registration

BPRM allows the user to register a new patient using the Mini-Registration option. **User must possess the SDZREGMENU key.** The **Register New Patient** option captures the minimal amount of patient information needed to schedule an appointment.

- Right click on an appointment slot to create a new appointment.
- Enter the new patient's name.
- When the name is not found, click the **Register New Patient** link to register the new patient.
- Enter patient data then click Save. At this point, the patient appointment can be scheduled.

Schedule Appointment - PARTNERSHIP CLINIC

NURSE CLINIC

Select Patient [required]

TEST, TOMMY

Search Results

Register New Patient

← Displaying 1 - 1 →

Mini Registration

Name [required] TEST, TOMMY

Date Of Birth [required] 04-04-1944

Birth Sex [required] MALE

Social Security Number

Reason For No SSN Not Available

Autogenerate HRN

Discard Save



Scheduling – Appointment Status Types

BPRM uses the following appointment status types and colors while the user manages patient appointments. These status buttons can be independently clicked to toggle appointment display in the Scheduling Workspace.



When the screen display is small, the status legend will display as follows and will work the same.



Scheduling – Manage Patient Appointments

Right click on an existing appointment to access the **CONTEXT MENU** which contains multiple options so the user can handle multiple scenarios. The context menu lists various options based on the Appointment Status.

- Check-In
- Cancel
- No-Show
- View Appointment Detail
- Schedule Parallel
- Copy
- Copy to Reschedule
- Add to Waiting List

- Print Routing Slip
- Print Wellness Handout
- Print Medication Profile
- Print Wrist Band
- Print Pre Appointment Letter
- Print Future Appointments
- View Patient Demographics
- Select Patient in EHR



Scheduling – Manage Patient Appts (cont'd)

Right click on a **SCHEDULED** appointment to access the options available to the user.

- **Check-In** – Select this option to mark an appointment as Checked-In. Note that this option is only available for the current day or earlier. There is also an Undo Check-In to reverse a Checked-In appointment.
- **Cancel** – Select this option to mark an appointment as Cancelled. User must select Cancellation Type and Reason to successfully cancel the appointment. Cancellation Remarks can also be entered as needed.
- **No-Show** – Select this option to mark an appointment as a No-Show. Note that this option is only available for the current day or earlier. There is also an Undo No-Show to reverse a No-Show appointment.



Scheduling – Manage Patient Appts (cont'd)

Right click on **any** appointment and select **View Appointment Detail**. The Appointment Detail screen will display and allow the user to add or update **Other Info**.

View Appointment Detail - PARTNERSHIP CLINIC

TEST,SEAN
11-28-2000 (23 YRS) - FEMALE
PCP:

HRN: 852366
Eligibility Status:
Last Updated On: 07-02-2024

WALKIN **CHECKED IN** on 07-02-2024 05:26 PM at PARTNERSHIP CLINIC

Created On	Scheduled Time	Scheduled By	Type Of Visit
07-02-2024 05:33 PM	07-02-2024 09:00 AM	WOMACK,TAMMY	WALKIN APPT.
Check-In Time	Check-In By		
07-02-2024 05:26 PM	WOMACK,TAMMY		

Other Info

Patient is allergic to peanuts.

Discard Save



Scheduling – Manage Patient Appts (cont'd)

Right click on a **SCHEDULED** appointment to access two options to “copy” the appointment.

- **Copy** – Select this option to copy the selected patient’s information for an appointment in order to paste data into one or more other appointment slots on the same clinic or another clinic.
- **Copy to Reschedule** – Select this option to copy the appointment details and reschedule the appointment to a different date and/or time. This option will cancel the original appointment as well as create the new appointment. BPRM will insert a note in the cancelled appointment to indicate the new date/time.

Reschedule Appointment - PARTNERSHIP CLINIC

DEMO, MARY JANE
07-04-1977 (46 YRS) - FEMALE
PCP:

HRN: 852852
Eligibility Status: DIRECT ONLY
Last Updated On: 07-17-2020

Cancellation Type [required] Cancellation Reason [required]
CANCELLED BY PATIENT UNABLE TO KEEP APPOINTMENT

Cancellation Remarks
This appointment was rescheduled for 7/3/2024 10:00 AM

Schedule Date [required] Schedule Time [required] Appointment Length [required]
07-03-2024 10:00 AM 30

Other Info
Patient needs medication refills.

Discard Save



Scheduling – Appointment Printings

Right click on **any** appointment to access the options to print various information.

- **Print Routing Slip** – Select this option to print a routing slip for the selected patient. The routing slip includes current appointment including checked-in time and future appointments.
- **Print Wellness Handout** – Select this option to print a patient wellness handout (PWH) for the selected patient. Depending on the PWH setup at the site, the list of handouts may vary.
- **Print Medication Profile** – Select this option to print the patient’s Rx Profiles (Medication Profile).
- **Print Wrist Band** – Select this option to print a Wrist Band for the patient.
- **Print Pre Appointment Letter/ Cancellation Letter / No-Show Letter (depends on appt status)** – Select this option to print the appropriate Letter for the selected patient using the Clinic Default Letter. If the clinic does NOT have a default letter, the user will be required to select a letter template.
- **Print Future Appointments** – Select this option to print a Future Appointments report for the selected patient. The report will display a list of the patient’s upcoming appointment date/times across all Divisions and all Clinics.



Scheduling – Appointment “Jumps”

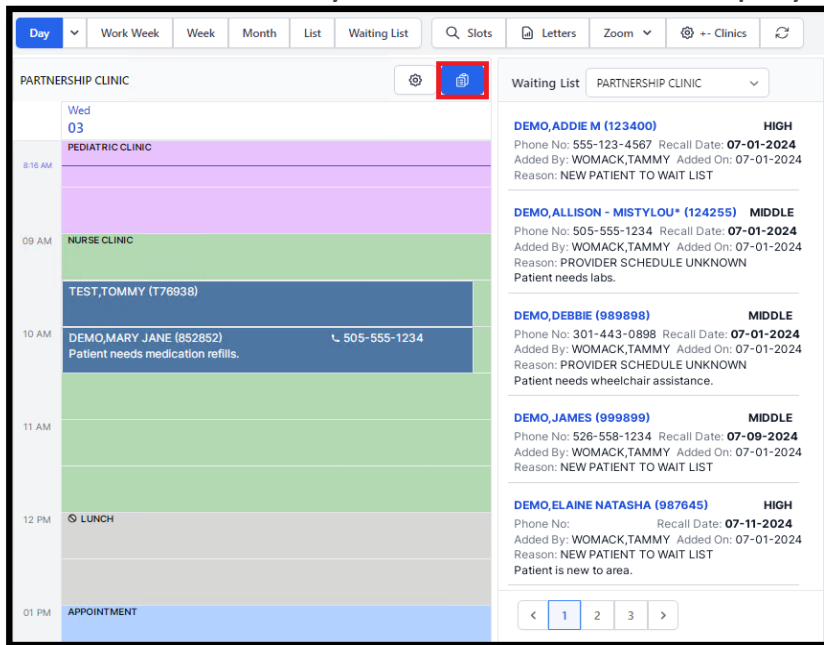
Right click on **any** appointment to access the options to allow the user to “jump” to another location.

- **View Patient Demographics** – Select this option to jump to the patient’s profile page in the BPRM Registration module. This jump is useful so that the user can quickly update the patient address, phone number, etc. **NOTE: This option requires the user to possess the AGZMENU key.**
- **Select Patient in EHR** – Select this option to jump to the Electronic Health Record (EHR) application with the current patient’s record displayed. This jump is useful so that the user can quickly access additional patient information. **NOTE: This option requires the user is already logged into EHR.**

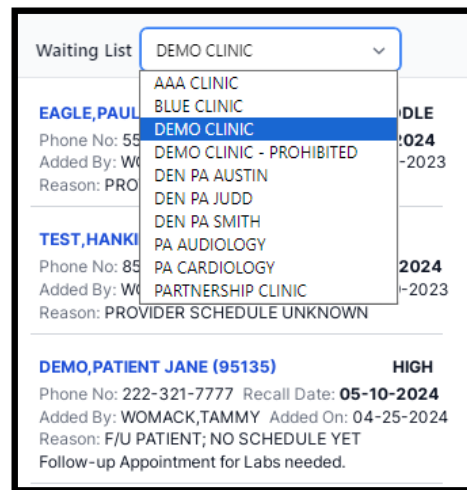


Scheduling – Workspace Waiting List

The ability to manage the Waiting List from the Scheduling Workspace is valid for Day, Work Week, Week view and only when ONE Clinic is displayed. Click the clipboard as indicated below:



- User can view the Waiting List for other clinics.



- User can right click on a Waiting List entry to **Edit** or **Remove** the entry.



Scheduling – Workspace Waiting List (cont'd)

Once the Waiting List is visible, user can drag/drop an entry from list to the Scheduling Workspace to create the patient appointment. At that point, the user can Remove Patient from the Waiting List.

Schedule Appointment - PARTNERSHIP CLINIC

DEMO,PATIENT JANE HRN: 95135
09-09-1984 (39 YRS) - FEMALE Eligibility Status: DIRECT ONLY
PCP: Last Updated On: 04-24-2024

Schedule Date: 07-03-2024 Schedule Time: 11:00 AM Appointment Length: 30 [required]

Other Info

Patient is on waiting list(s)
Remove Patient from waiting list Waiting Lists



Scheduling – Waiting List from List View

User can manage the Waiting List using the List view. Click the **Waiting List** button from the Toolbar.

The screenshot displays a software interface for managing a waiting list. The top toolbar includes a 'Waiting List' button, which is highlighted with a red box. Below the toolbar, there are several filter and action options: 'Filter by Patient' and 'Add Waiting List'. The main area contains a table with the following data:

PATIENT	CLINIC / PROVIDER	DATE ADDED	RECALL DATE	PRIORITY / STATUS	COMMENTS / RESOLUTION	DATE REMOVED
EAGLE, PAULA (130990) 555-555-7032	DEMO CLINIC DEMO,DOCTOR	01-10-2023 WOMACK,TAMMY	01-11-2024	MIDDLE OPEN		
TEST,HANKIE - HANK* (41456) 856-445-2212	DEMO CLINIC DEMO,DOCTOR	03-29-2023 WOMACK,TAMMY	03-29-2024	OPEN		
TEST,CARL (147136)	DEMO CLINIC DEMO,DOCTOR	04-25-2024 WOMACK,TAMMY	05-10-2024	MIDDLE OPEN		
DEMO,ADDIE M (123400) 555-123-4567	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	HIGH OPEN		
DEMO,ALLISON - MISTYLOU* (124255) 505-555-1234	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	MIDDLE OPEN	Patient needs labs.	
DEMO,DEBBIE (989898) 301-443-0898	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-01-2024	MIDDLE OPEN	Patient needs wheelchair assistance.	
DEMO,JAMES (999899) 526-558-1234	PARTNERSHIP CLINIC DEMO,DOCTOR	07-01-2024 WOMACK,TAMMY	07-09-2024	MIDDLE OPEN		

At the bottom of the table, it says 'Showing 1 to 10 of 20 results' and there are navigation buttons for page 1 and 2.

Selection/Filtering options are available where the user can:

- Select multiple clinics
- Filter on Case Status and/or Recall Date
- Change Sort Order

Using the buttons (upper right), the user can:

- Search for a specific Patient using Filter by Patient box (upper right)
- Add entry to a Waiting List using Add Waiting List button



Scheduling – Waiting List: Edit/Remove

User can right-click on Waiting List entry to **Edit** or **Remove** the entry.

Edit Waiting List

DEMO,DEBBIE HRN: 989898
01-01-1962 (62 YRS) - FEMALE Eligibility Status: DIRECT ONLY
PCP: Last Updated On: 02-13-2017
PARTNERSHIP CLINIC Added on 07-01-2024 by WOMACK,TAMMY

Reason [required] Priority

Recall Date [required] Provider

Comments

Remove Waiting List

DEMO,JACK HRN: 888778
08-01-1980 (43 YRS) - MALE Eligibility Status: CHS & DIRECT
PCP: Last Updated On: 08-30-2022
PARTNERSHIP CLINIC Added on 07-01-2024 by WOMACK,TAMMY

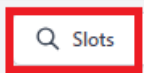
Date Removed [required] Resolution [required]

Comments



Scheduling – Waiting List: Schedule (Search Slots)

User can also right-click on Waiting List entry to **Schedule** the entry or select **Slots** from Toolbar.



Search Appointment Slot

Clinic: PARTNERSHIP CLINIC
Appointment Length: 30
Access Type: APPOINTMENT
Time of Day: All day
Search

July 2024 Today

SUN	MON	TUE	WED	THU	FRI	SAT
30	Jul 1	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	Aug 02	03	

1:00 PM-1:30 PM APPOINTMENT
1:30 PM-2:00 PM APPOINTMENT
2:00 PM-2:30 PM APPOINTMENT
2:30 PM-3:00 PM APPOINTMENT
3:00 PM-3:30 PM APPOINTMENT
3:30 PM-4:00 PM APPOINTMENT
4:00 PM-4:30 PM APPOINTMENT
4:30 PM-5:00 PM APPOINTMENT

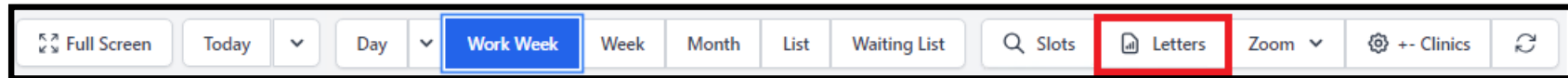
Discard **Schedule**

- User must select Clinic, Appt Length, Access Type (optional) and Time of Day then click Search.
- Days with availability will display on the calendar with a blue dot.
- User can select a certain day to see available time slots.
- Select a slot and click Schedule to schedule the patient appointment.



Scheduling – Print Letters

Use the **Letters** button to print patient letters. This function works the same as the **Print Letters** option under Reports.



Print Letters

Printer Option:

Clinic:

Letter Type:

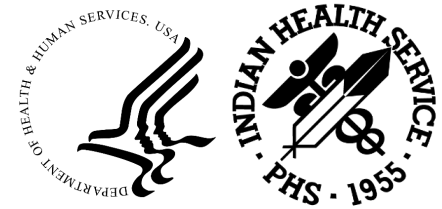
Start Date:

End Date:

User must select:

- Printer Option (Browser/Device)
- Clinic
- Letter Type (Pre-Appt, Clinic Cancel, Appt Cancel, No-Show)
- Start/End Dates

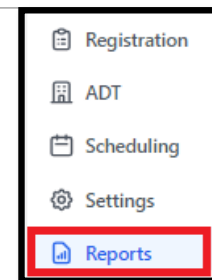
Click Print to begin printing Letters.



Scheduling – Reports

Click **Reports** then the desired Report (Under SCHEDULING section)

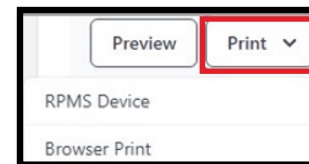
- Appointments Requiring Action Report
- Cancelled Appointment Report
- Clinic Schedule Report
- Clinic Workload Report
- No Show Report
- Waiting List Report
- Print Letters



Each Report offers various filters, sorts and date range parameters.

Once set, the user can view report results in the following ways:

- Click **Preview** to view report on the screen
- Click **Print** to print report to an RPMS Device or to the Browser



Scheduling – Reports (sample parameters)

Waiting List Report

Clinics <input type="text" value="PARTNERSHIP CLINIC"/>	Start <input type="text" value="07-01-2024"/>	End <input type="text" value="08-14-2024"/>	Date Range Type <input type="text" value="Recall Date"/>
Include Removed Entries <input type="text" value="No"/>	Group By <input type="text" value="Dates Selected"/>	Priority Filter <input type="text" value="ALL"/>	Print Summary Only <input type="text" value="No"/>



Scheduling – Reports (sample report)

TW ***Confidential Patient Data Covered by Privacy Act*** Page: 1
 Waiting List for: PARTNERSHIP CLINIC
 For Recall Date: 7/1/2024 To 8/14/2024
 Grouped by: Dates Selected

Recall Date : Jul 01, 2024

7/1/24	DEMO,ADDIE M	123400	15(F)	HIGH	555-123-4567
7/1/24	DEMO,ALLISON Patient needs labs.	124255	85(F)	MIDDLE	505-555-1234
7/1/24	DEMO,DEBBIE Patient needs wheelchair assistance.	989898	62(F)	MIDDLE	301-443-0898
7/1/24	DEMO,JAMES	999899	23(M)	LOW	526-558-1234

Recall Date : Jul 11, 2024

7/11/24	DEMO,ELAINE NATASHA Patient is new to area.	987645	0(F)	HIGH	
7/11/24	DEMO,PATIENTK	999103	18(M)	HIGH	

Recall Date : Jul 15, 2024

7/15/24	DEMO,BABY NEWBORN Patient needs medication refills.	987699	1(M)	HIGH	
---------	--	--------	------	------	--



Scheduling – Manage Clinic Settings

Click **Settings** then **Clinics** (Under SCHEDULING section)

NAME / ABBREVIATION	RESOURCE NAME	DIVISION / INSTITUTION	ACTIVE	INACTIVATED ON	REACTIVATED ON
2013 DEMO HOSP PHARMACY (UP TO PHARM)	2013 DEMO HOSP PHARMACY (UP TO PHARM)	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
AAA CLINIC AAA	AAA CLINIC	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
ACCESS BLOCK TESTING ABT	ACCESS BLOCK TESTING	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
ADULT CLINIC CAC	ADULT CLINIC	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
BLUE CLINIC BLC	BLUE CLINIC	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
BPRM DEMO CLINIC BDC	BPRM DEMO CLINIC	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
BPRM PRINCIPAL BPRM		2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		
CHART REVIEW 2013 DH CHCR	CHART REVIEW 2013 DH	2020 DEMO HOSPITAL 2021 DEMO HOSPITAL (INST)	YES		

Using the buttons (upper right), user can:

- Search for a specific Clinic using **Filter by Name** box (upper right)
 - Add new Clinic using **Add Clinic** button
- Click **Edit** to edit clinic data or **Availability** to edit clinic availability.



Scheduling – Manage Clinic Settings (cont'd)

Clinic Settings → General Parameters + Waiting List

Clinic Configuration

Name [required]	Abbreviation [required]	Division [required]	
<input type="text" value="PARTNERSHIP CLINIC"/>	<input type="text" value="PC"/>	<input type="text" value="2020 DEMO HOSPITAL"/>	
Institution [required]	Treating Specialty	Principal Clinic	Clinic Code [required]
<input type="text" value="2021 DEMO HOSPITAL (INST)"/>	<input type="text" value="Please Select"/>	<input type="text" value="Search"/>	<input type="text" value="GENERAL PREVENTIVE"/>
Service	Telephone	Reactivate Date	Inactivate Date
<input type="text" value="MEDICINE"/>	<input type="text"/>	<input type="text" value="--/--"/>	<input type="text" value="--/--"/>
Multiple Clinic Codes Used	Prohibit Access To Clinic	Non Count Clinic	Include On File Room Lists
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clinic Meets At This Facility	Physical Location		
<input type="checkbox"/>	<input type="text"/>		
Waiting List			
Active <input checked="" type="checkbox"/>			

- At a minimum, enter data in required clinic fields to set up clinic defaults.
- Click **Prohibit Access to Clinic** to allow only users with sufficient access rights to access this clinic.
- Click the **Active** button under Waiting List to activate the Waiting List for the Clinic.



Scheduling – Manage Clinic Settings (cont'd)

Clinic Settings → Scheduling Parameters

Scheduling			
Length Of Appointment [required]	Display Increments/Hour [required]	Max Overbooks/Day	Allowable No-Shows
<input type="text" value="30"/>	<input type="text" value="30-MIN"/>	<input type="text" value="30"/>	<input type="text" value="3"/>
No-Show Waiting Period	Future Booking Max Days [required]	Hour Display Begins	Visit Service Category
<input type="text" value="0"/>	<input type="text" value="365"/>	<input type="text" value="8"/>	<input type="text" value="AMBULATORY"/>
Ask For Check-In/Check-Out Time	Schedule Holidays	Required X-ray Films	Variable Appointment Length
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Create Visit At Check-in	Provider Required For Visit		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

- Values entered in **Length Of Appointment** and **Display Increments/Hours** determine the display of the Scheduling Workspace.
- Clicking **Variable Appointment Length** allows user to change Appointment Length when creating patient appointments.



Scheduling – Manage Clinic Settings (cont'd)

Clinic Settings → Letter Templates

- **PREREQUISITE:** Letter Templates must be added via **Settings – Letter Templates** so that it can be selected as a default for the clinic. Each Letter Template is marked as LETTER TYPE: PRE-APPOINTMENT, CLINIC CANCELLED, APPOINTMENT CANCELLED or NO-SHOW.
- **NOTE:** If a default is **NOT** selected for a Letter Type, the user will have to select a template when printing individual and/or bulk letters for the clinic.

Letter Templates			
Pre Appointment Letter	Clinic Cancelled Letter	Appointment Cancelled Letter	No-Show Letter
PS PRE-APP	PS CLINIC CANCELLED	PS APPOINTMENT CANCELLED	PS NoShowGeneral



Scheduling – Manage Clinic Settings (cont'd)

Clinic Settings → Clinic Users/Clinic Providers

Clinic Users					Search	Add
NAME	MODIFY APPOINTMENTS	MODIFY SCHEDULE	OVERBOOK	MASTER OVERBOOK		
TOWNSEND,GAIL	YES	YES	YES	YES	Edit Remove	
WOMACK,TAMMY	YES	YES	YES	YES	Edit Remove	
Clinic Providers					Search	Add
NAME	DEFAULT					
DEMO,DOCTOR	YES				Edit Remove	

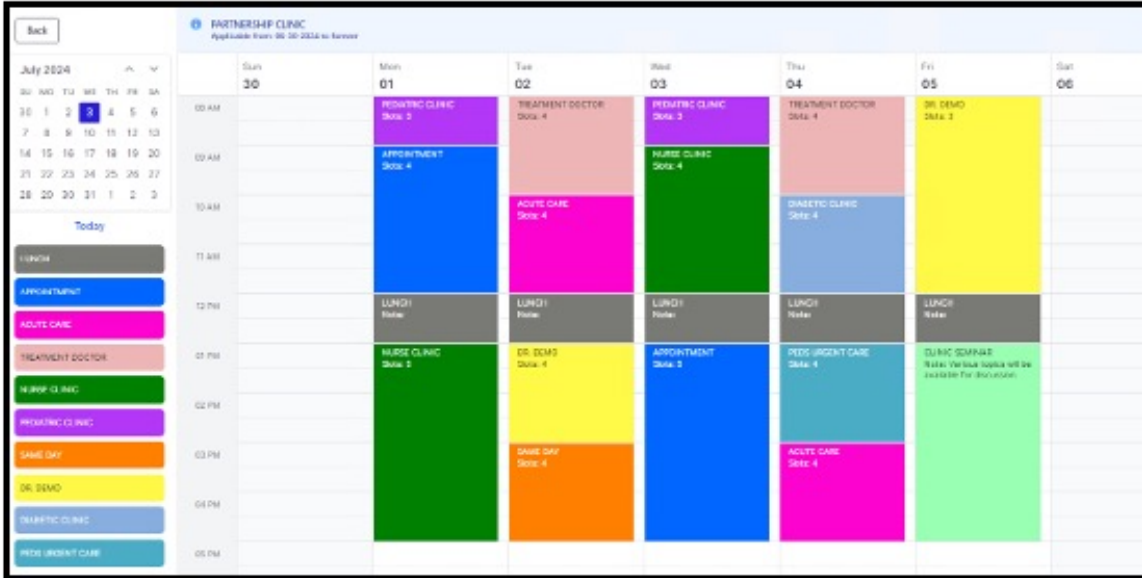
- Add **Clinic Users** with the appropriate level of access.
- Add **Clinic Provider(s)** with a single Provider set as Default.
- Use Search box to find a single User or Provider.



Scheduling – Manage Clinic Availability

Settings – Clinics: Find Clinic/click **Edit Availability** or click gear button  from Workspace

- **PREREQUISITE:** Access Types must be added via **Settings – Access Types** so that it can be used in setting up Clinic Availability.



When setting Availability, user can:

- Create, Change, Delete Access Blocks
- Drag/Drop entry from Access Block Pool
- Copy From Day, Week
- Clear Day, Week



Scheduling – Manage Clinic Availability (cont'd)

When configuring an Access Block, user must:

- Select Access Block Type (**Show As**)
- **Number of Slots** (for maximum #parallel appointments)
- **Start/End Times**

Configure Access Block

Show As [required] Number Of Slots

APPOINTMENT 4

Start Time [required] End Time [required]

09:00 AM 12:00 PM

Discard Save



WHAT IS NEXT FOR BPRM?



BPRM v4 Patch 4 – Release date August 8, 2024

SCHEDULING

- Clinic Availability updates display in REAL TIME so that ALL users can see latest changes immediately.
- Pre-Appointment Letters include the patient's future Appointments.
- User can select multiple clinics when viewing appointments using the List View format.
- User can add a Note to further explain the use of a Blocked section in the Scheduling Workspace.
- From an appointment in the Scheduling Workspace, the user can print the patient's Rx Medication Profile.
- Waiting List view offers ability for users to Search for a Patient and Sort by Month or Patient Name.

REGISTRATION

- When a Benefit Case is assigned, the user receives a MailMan notification indicating the assignment.
- Patient address is validated to suggest the standardized format required for certification.
- User is prevented from selecting an Inactive Community, but the community displays in patient history.
- User can add a Guarantor for a patient that is NOT currently registered.
- The Temporary Chart Number Report is available in the Registration Reports section.

ADT

- Only ACTIVE Chart Deficiencies are displayed for user selection.
- Only ACTIVE Admission Sources are displayed for user selection.
- User can Cancel an active Admission by selecting Deletion Reason.
- User can toggle Bed status on and off to adjust Ward display as needed.



BPRM v4 Patch 5 – Expected Release date November 2024

SCHEDULING

- Parallel appointments display by status (from left to right): CI, SC, CO, NS, CN.
- Check-In and Scheduled appointments display by time ascending so patient checked in first is on left.
- Check-In/Check-Out time displays when user hovers over appointment.
- Issue fixed where Checked Out appointment status changed to Scheduled after admission.

REGISTRATION

- Modify button appears closer to Internet Access status to avoid user confusion.
- Appointment tab automatically REFRESHES as appointments are made or updated in Scheduling.
- The Insurance Enrollment Report will be available in the Registration Reports section.

ADT

- Hover text includes ellipse indicator (...) after Comments to alert user that additional comments exist.
- The Census Report will be available in the ADT Reports section.

Other

- BPRM Login functionality utilizes timeout parameter.
- Waiting List and Appointment List screens allow user to print Lists as a CSV delimited file.



BPRM v4 Patch 6 – Release date To Be Determined

SCHEDULING

- Incorporate Audit Logs to support data integrity, accuracy and completeness.
- Fix issue to allow Cancellation Letter to successfully print using a Device.
- Add ability to run Reports by Access Block.

REGISTRATION

- Implement automatic lookups using City or ZIP code to assist with address validation and format.
- Process bulk update on patient historical address file to meet format and certification requirements.
- Add address (line 0) to capture Business Name, Care Of, etc. without affecting existing address data.
- Add new fields to capture Legal Guardian with relationship dropdown to allow for Parent/Parent.
- Add new fields to capture Patient Occupation and Occupation Industry.
- Capture Date of Birth with Private Insurance policy holder member data.
- Increase City Name to 28 characters.
- Increase Insurance Group Number to 25 characters.
- Increase Tribal Enrollment Number to 16 characters.



BPRM Future Patches

SCHEDULING

- Provide ability to send individual and bulk Appointment Reminders via Text.
- Waiting List Enhancements:
 - Do NOT allow user to add duplicate entries.
 - Allow user to efficiently move patient from one clinic Waiting List to another.
 - Allow user with appropriate key to add and remove Waiting List reasons.
- Allow user to select patient from another Division and Schedule an Appointment.
- From the Scheduling Workspace, allow user to Unblock a previously Blocked section.
- Include parameter in Clinic Settings to capture END time to allow for additional display and validation checks.
- Add Next Available Appointment Report to Scheduling Reports section.

REGISTRATION

- Enhance Appointment tab to include a Waiting List indicator to alert user that patient is on a Waiting List.
- Validate Foreign and Military addresses to suggest the standardized format required for certification.
- Provide “Quick Add” option allowing user to add Insurer Group and Employer data.

ENHANCE BPRM to include NEW MODULES:

- Provide ability to create and manage **CHS Purchase Orders**.
- Provide ability to create and manage **RCIS Referrals**.
- Provide user-specific **Communication Tasks** page to assist with notifications, including managing Benefit Cases.



Practice Management Application Suite (BPRM) --- FEEDBACK/REQUESTS

Please use the following link to report any Feedback and/or Requests for future modifications to BPRM:

<https://www.ihs.gov/rpms/feedback/>

NOTE: Under “**Application**”, please select “**Practice Management Application Suite (BPRM)**” when submitting your request.

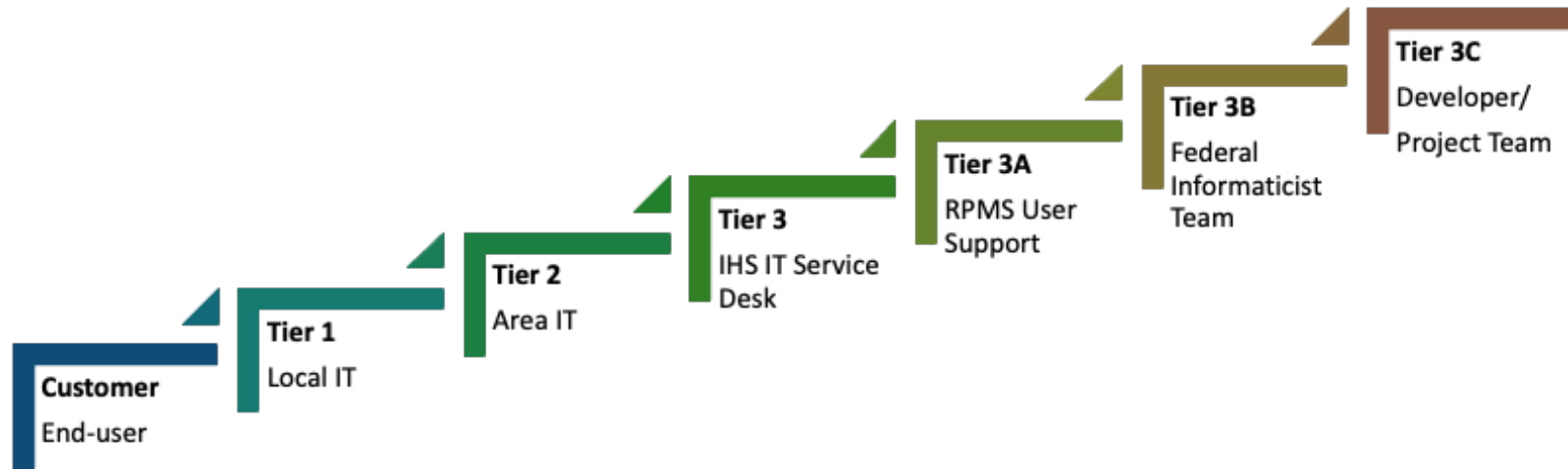


Practice Management Application Suite (BPRM) Resources

- BPRM Application Overview Manual
 - https://www.ihs.gov/rpms/packagedocs/BPRM/bprm040u_Overview.pdf
- BPRM Patient Registration User Manual v4.1
 - https://www.ihs.gov/rpms/packagedocs/BPRM/bprm0400.01u_Registration.pdf
- BPRM Scheduling User Manual v4.1
 - https://www.ihs.gov/rpms/packagedocs/BPRM/bprm0400.01u_Scheduling.pdf
- BPRM Admit/Discharge/Transfer (ADT) User Manual v4.1
 - https://www.ihs.gov/rpms/packagedocs/BPRM/bprm0400.01u_ADt.pdf



IHS IT Service Desk Support Tier Structure



Q & A



