

38.0 REGISTRIES

38.1 Registries Overview

The functionality as a whole provides encounter workflow-oriented support to assist providers and clinic staff with the tracking and execution of Clinical Practice Guidelines (CPG) and Registry protocols and other protocol and tracking needs. This functionality can be seen throughout many modules in AHLTA.

The Registries functionality includes:

- The configuration of Registries, to include associated protocols, autocites, templates, order sets, and questionnaires, as well as permissions/filters so that protocol items target only the appropriate set of users.
- The integration of configured Registry protocol items with the current AHLTA wellness reminders to provide an integrated, actionable view of items due and overdue for a patient.
- The integration of configured Registry templates and order sets with the encounter documentation.
- Manual and automated registration mechanisms to assign patients to Registries.

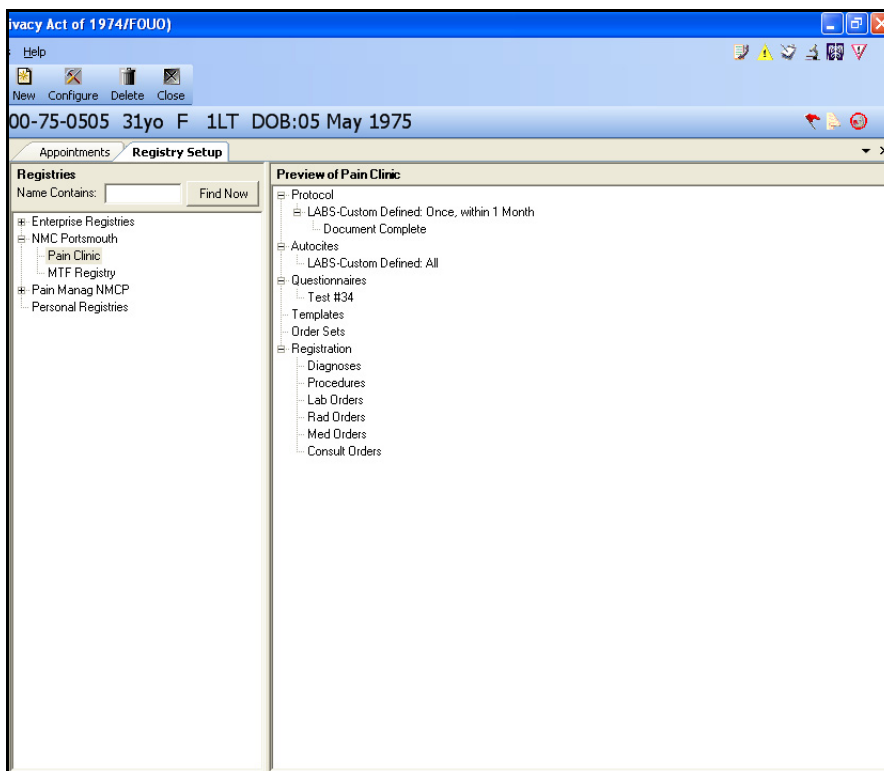


Figure 38-1: Example Patient Registry

38.1.1 In More Depth

To assist providers and clinic staff with tracking and executing CPG protocols and other protocol and tracking needs, Registries should first be created or configured and then patients should be assigned to them. The configuration and assigning of patients to a registry can be found in two separate modules within AHLTA.

- **Registry Setup:** Allows for the creation and configuration of a registry
- **Patient Registries:** Allows for the management of the patients assigned to a specific registry

The configuration of Registries should be accomplished primarily by a certain super user at the enterprise and local levels. The primary users targeted for using the Registries modules are those that document encounters within AHLTA- especially providers, nurses and screening technicians. Addressing Registry protocol reminders, using Registry-related templates, order sets, and questionnaires should be made virtually seamless with the usual documentation that is required during an encounter.

The below outlines the steps of the typical encounter workflow with a patient who is assigned to a Registry.

1. Patient is assigned to diabetes registry.
2. Patient arrives for diabetes follow-up appointment and is checked in.
3. Support staff opens the encounter and immediately sees the protocol items, from the diabetes registry, which are due for the patient. Support Staff addresses the items. Diagnoses, orders, and Other Therapies associated with the protocol items are automatically added to the A/P section of the note.
4. Provider opens the encounter and sees the protocol items in autocites and notes which have been addressed.
5. Provider opens A/P and loads registry template and order set to facilitate the documentation.
6. Provider opens S/O and uses same registry template to document the note.
7. Encounter is complete with protocol items addressed and documentation is complete.

Once Registries are configured, then patients can be assigned/unassigned or registered/de-registered to a specific Registry manually or automatically based on Orders, Diagnoses and/or Procedures targeted in the Registry.

The below definitions explain terms and concepts that are used throughout the Registry section of this manual, as well as within AHLTA.

- **Clinical Practice Guideline (CPG):** A systematically developed statement that includes recommendations, strategies, or information that assists physicians and/or other health care practitioners and patients to make decisions about appropriate health care for specific clinical circumstances. In AHLTA functionality, “CPG” and “Registry” are synonymous.
- **Registry:** Set of protocol items, associated AutoCites configurations, associated Questionnaires/Tests, associated Templates, associated Order Sets, associated

rules for auto-registration, associated filtering configuration for displaying the Reminders pop-up window, associated Permissions configuration. Configured by users and then incorporated by the application into the appropriate clinical areas of the encounter workflow. Used by providers to make decisions about and take actions on appropriate health care for specific clinical circumstances. (also see Clinical Practice Guideline)

- **Registry List:** List of patients enrolled in a specific Registry.
- **Registry Reminder:** A notification to the user of a protocol item that is due for a patient, generated based on the Registry module configurations.
- **Pre-configured item:** A protocol item that has been already mapped through an administrative tool (a tool outside of AHLTA); user can select and add a pre-configured item as a protocol item for a Registry.
- **Protocol:** The set of Protocol Items for a specific Registry that become reminders for a patient.
- **Protocol Item:** A reminder added to a Registry; includes the following types: Pre-configured, Questionnaire/Test, Questionnaire/Test – Single Question, and Custom Defined. A protocol item that has been triggered to be included on a patient's Reminders list can be referred to as a Registry Reminder.
- **Reminder List:** List of due/coming due/overdue notifications for a selected patient. The Reminders list on the A/P tab and the pop-up window can be comprised of both Registry reminders and Wellness reminders.
- **Wellness Reminder:** A notification to the user of a preventive health item for a patient generated by the Wellness module. These reminders are tied to the United States Preventive Services Task Force (USPSTF) guidelines for the general population.

38.1.1.1 Registries and Failover Mode

The point-of-care workflow aspects of the Registries (Due reminders dialog/Reminders tab, Registry Autocites, templates, and order sets) will be enabled in failover mode; however, the Registry, the configuration of Registries and protocols will *not* be enabled in Failover mode. The below information will be synchronized from the CDR to the Local Cache Server on a nightly basis:

- Registry data applicable to a given MTF.
- Registry membership data for patients with upcoming appointments in conjunction with the staging of patient and clinical data for appointments.
- Registry reminder data.

38.2 Registry Setup Module Overview

The Registry Setup module allows a user to create a new Registry, view details of an existing Registry, and edit an existing Registry. In creating a new Registry, the user will be able to enter the Registry Name, select a default diagnosis, enter a URL address, select an Owner, select a Site, and then designate if the Registry is Active or

Inactive. Protocol items, AutoCites, Questionnaires/Test, Templates, Order Sets, and Registration settings that are associated to the selected Registry can also be viewed.

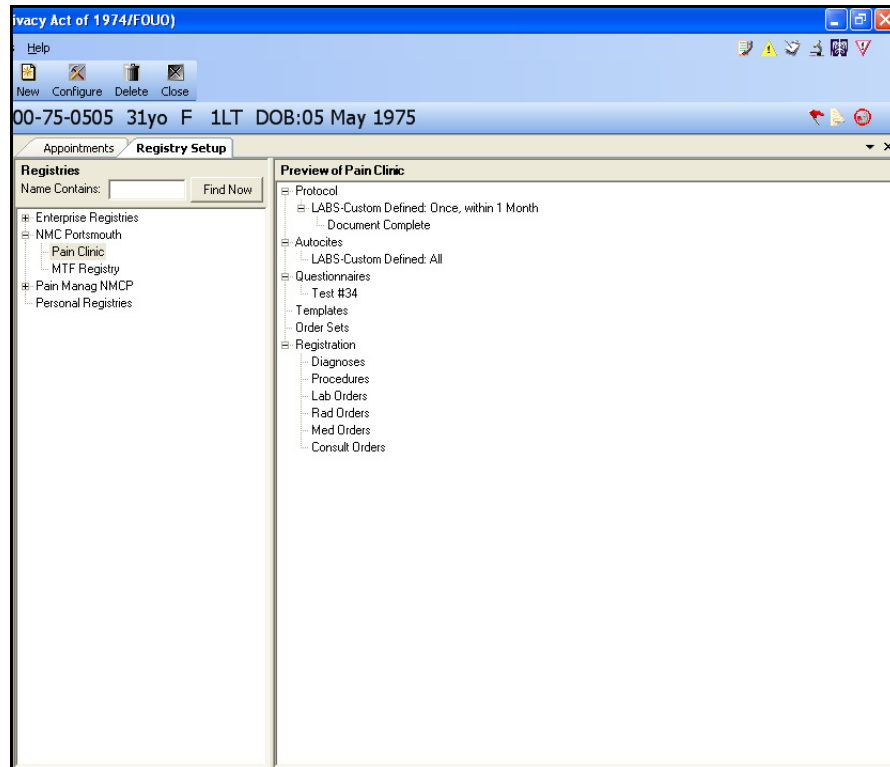


Figure 38–2: Military Clinical Desktop—Registry Setup Module

38.2.1 Registry Setup—In More Depth

The Registry Setup module allows a user to configure all items and parameters in a registry. The items and parameters that can be configured are:

- **Protocol Items (Reminders):** Preconfigured reminders for Labs, Medications, Rads, and Vital Signs, Questionnaires/test, Single question, and Custom Defined items.
- **Autocites:** Selected protocol items will be displayed in the autocites area of the Encounter if the option to show Registry related data is selected from the Encounter Summary Properties window and the patient is enrolled to the Registry.
- **Questionnaires:** Questionnaire and/or test selected here will display in the available list to Interview from in the Patient Questionnaire module.
- **Templates:** If the patient is enrolled to the Registry, the selected template will be at the top of the templates drop down list in S/O and A/P.
- **Order Sets:** If the patient is enrolled to the Registry, the selected order set will be at the top of the order set drop down list in the Order Sets tab of the A/P module.
- **Registration:** Selected diagnoses, procedures, and orders will automatically trigger a patient to be added to a Registry, if the selected items have been documented in a completed, signed encounter.

- **Filtering:** Authorized users can set the default setting for the automatic display of the Reminders window upon opening an encounter.
- **Permissions:** Allows an authorized user to limit access of a registry to a specific user or group of users.

38.3 Accessing a Registry

Follow the steps below to access a registry for viewing:

1. Expand the **Tools** folder on the Folders List.
2. Select the Registry Setup module.
3. Enter the name of the Registry in the Search field.
4. Click **Find Now**.
5. Select the Registry from the search results in the Registry pane. The right pane populates with the items in the selected Registry.
6. Preview the registry's contents from the Preview of Registry Configuration pane.

Note: You may also use the Registry trees to search for registries at the Enterprise, Facility, Clinic or Personal level.

38.4 Creating a New Registry

Follow the steps below to create and/or configure a registry:

1. Click **New** on the Action bar from the Registry Setup module. The module opens with the Protocol Items tab as the default view.

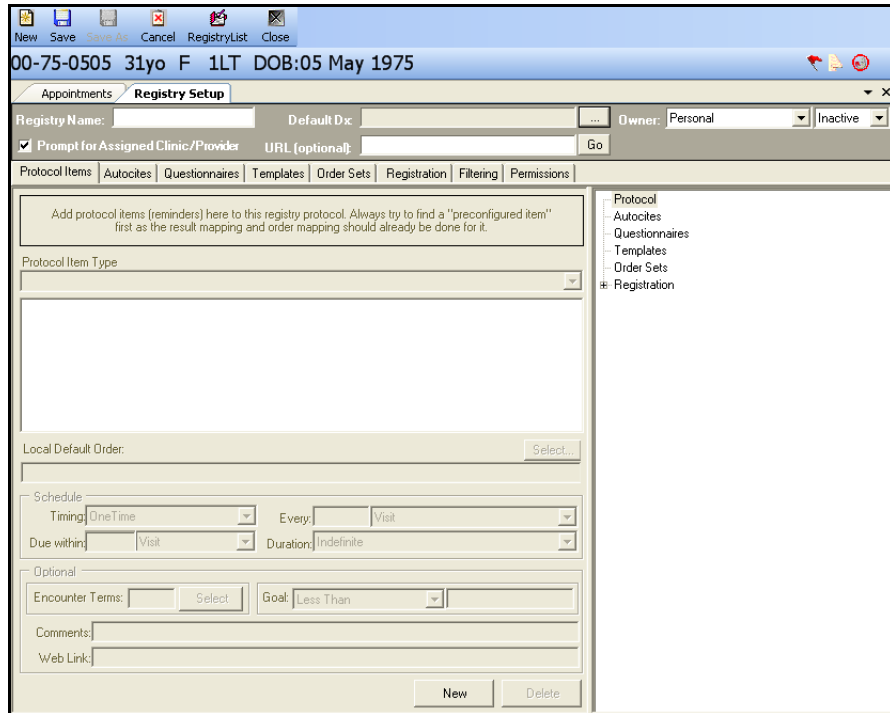


Figure 38–3: New Registry

2. Type the name of the Registry in the Registry Name field.
3. Click the ellipsis button next to the Default Dx field. The Default Diagnosis Search window displays.

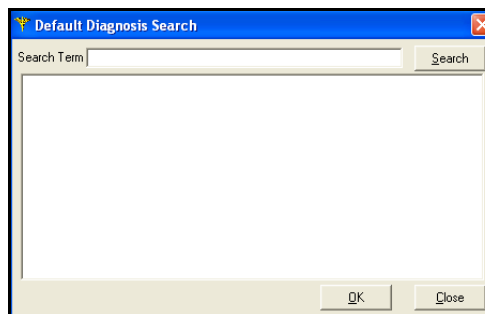


Figure 38–4: Default Diagnosis Search Window

4. Enter a diagnosis in the Search Term field and click **Search**.
5. Select the diagnosis and click **OK**.
6. Click the drop-down arrow next to the Owner field and select the owner type for the registry.
7. Select the active/inactive drop-down list and select a status.

8. Enter a URL (Uniform Resource Locator) in the URL field, if necessary.

Note: The purpose of a Registry URL is to give the user of the Registry a reference from which the Registry was created.

9. Click **Save** in the Action bar.

Figure 38–5: Registry Setup

10. Configure the registry by entering data on the available tabs.
 - **Protocol Items Tab:** Protocol items or reminders should be associated to a Registry. From the Registry Setup module, pre-configured and custom defined items can be added to the Registry.
 - **Autocites Tab:** Each protocol item a user defines for a registry may be selected to be auto cited in an encounter. The user must select the Registry check box on the Encounter Properties Summary window to include/not include the protocol item information.
 - **Questionnaire Tab:** Questionnaires/Tests selected for a Registry will display in the Patient Questionnaires module.
 - **Templates Tab:** The Templates selected in the Registry will appear at the top of the user’s template favorites list if the patient is enrolled to the Registry.
 - **Order Sets Registration Tab:** The Order Sets selected in the Registry will appear at the top of the user’s My Standalone Orders Set list if the patient is enrolled to the Registry.
 - **Registration Tab:** Items added here in the Registration tab of the Registry Set up module will automatically register a patient to a Registry if a diagnosis, procedure, lab order, med order, rad order and/or a consult order is docu-

mented in the encounter being signed, if the patient is not already enrolled to the encounter. The order will trigger the Registry and the patient will automatically be assigned to it. When AHLTA is operating in Failover mode, the user will not be able to manually add or remove a patient to/from a Registry.

- **Filter Tab:** The Filters tab can not be used with Personal or Clinic level Registries. Only authorized users may access and change MEPRS and Clinic defaults.
- **Permissions Tab:** The Permissions tab allows you to limit access of a registry to a specific user or group of users.

11. Click **Save**. The registry is saved.

38.4.1 Adding Protocol Items

A set of Protocol Items can be added to a registry. This may include lab tests, radiology tests, procedures, counseling, and questionnaires that should be administered to assigned patients periodically. For each protocol item, a schedule must be set and specific encounters terms can be associated so that, when documented in the course of an encounter, the protocol item will be addressed.

When an encounter is opened for a patient assigned to a registry, those protocol items that are due are displayed in the Reminders Window. The specific protocol items can then be addressed within the clinical workflow.

Follow the steps below to add items to the Protocol Items tab:

1. Click **New** on the bottom right of the Protocol tab.
2. Select one of the Protocol Item types from the Protocol Item Type drop-down list.

Note: You must save each Protocol item before you select the next one to add to the Registry. Therefore, to add another Protocol item, you must click **New** again.

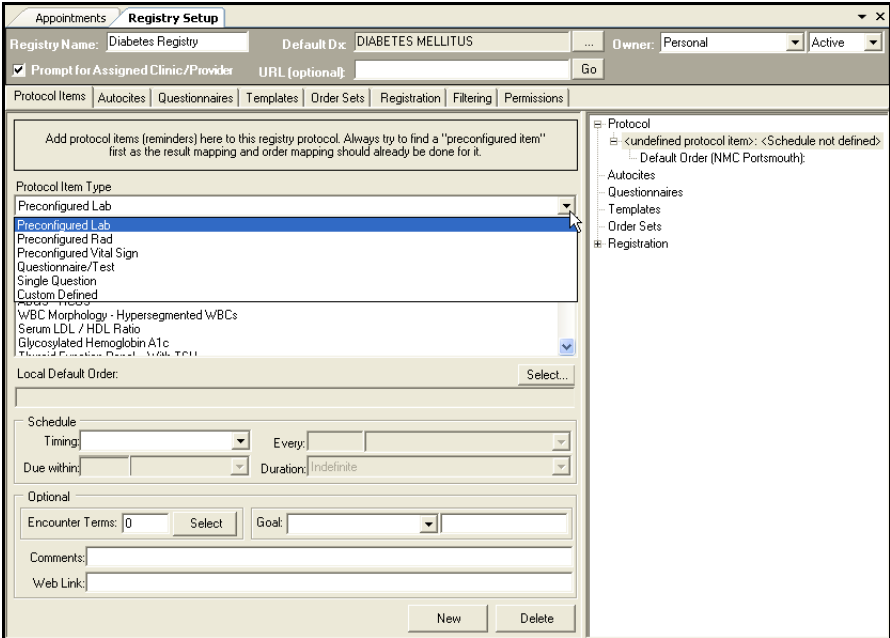


Figure 38–6: Protocol Items List

- Adding a Preconfigured Labs, Rads, Meds, Consults and Vital Signs
 - a. Select the type from the list below.
 - b. Complete the Local Default Order.
 - c. Proceed to step 3.

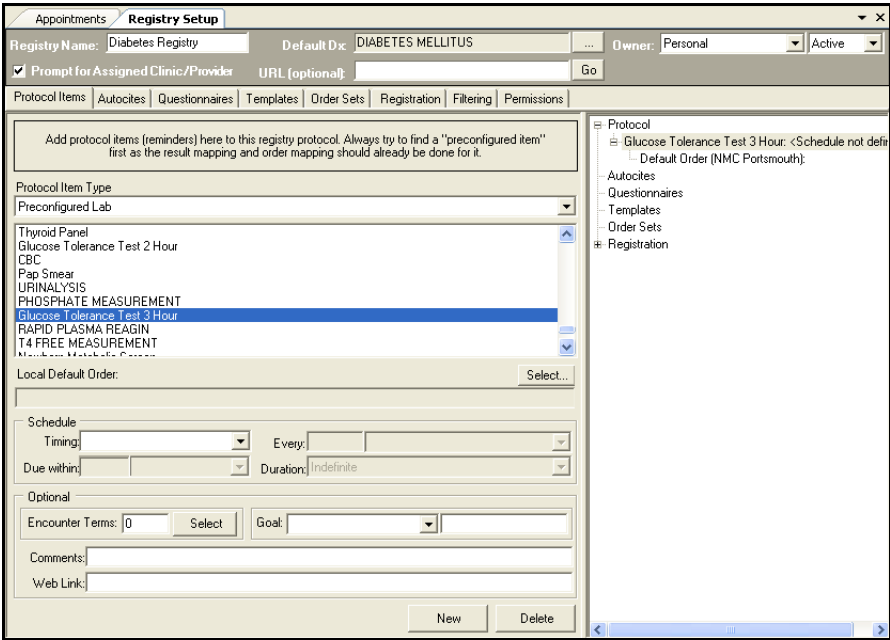


Figure 38–7: Protocol Items Tab—Preconfigured Labs

- Adding a Questionnaire/Test:
 - a. Enter the name for the Questionnaire/Test protocol or reminder in the Name field.
 - b. Click the **Select** button underneath the Questionnaire/Test name field. The Questionnaire--Select Questionnaire window opens.

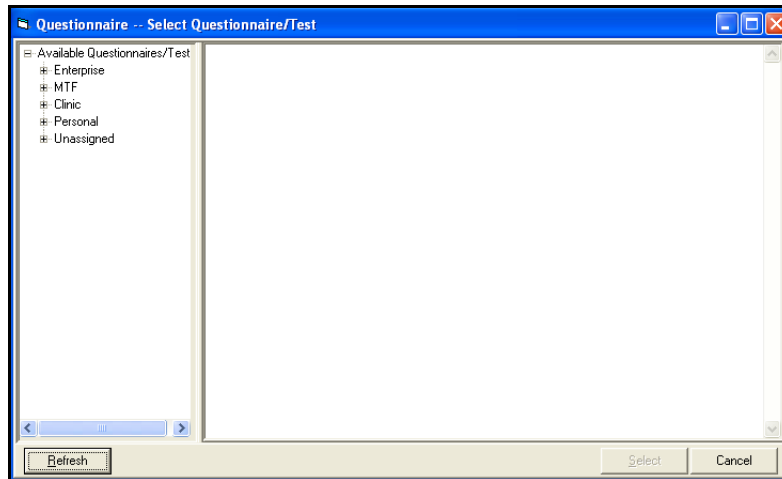


Figure 38–8: Questionnaire--Select Questionnaire Window

- c. Select the Questionnaire/Test.
- d. Click **Select**. The Questionnaire/Test is added to the Registry.
- e. Proceed to step 3.

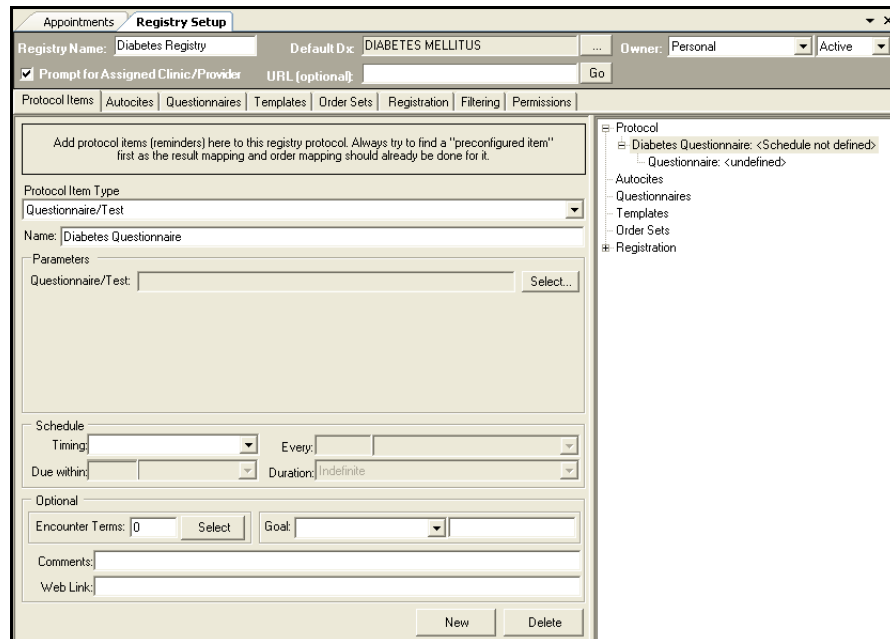


Figure 38–9: Protocol Items Tab—Questionnaire/Test

- Adding a Single Question:
 - a. Enter the name for the Questionnaire/Test protocol or reminder in the Name field.
 - b. Click **Select**. The Questionnaire--Select Questionnaire window opens.
 - c. Select the Questionnaire/Test. The questionnaire/test populates the window.
 - d. Click the drop-down arrow and select the question number.

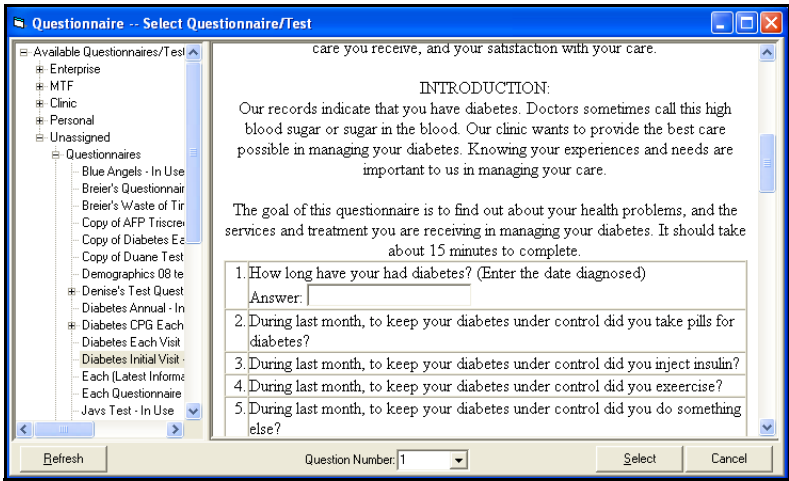


Figure 38–10: Questionnaire--Select Questionnaire Window – Select Question Number

- e. Click **Select**. The Question is added to the Registry.
- f. Proceed to step 3.

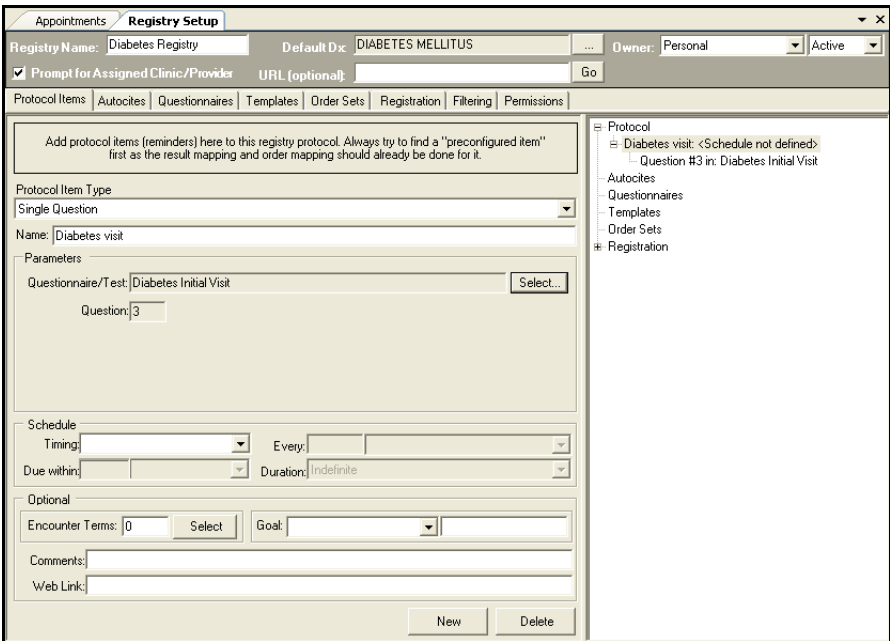


Figure 38–11: Protocol Items Tab – Single Question

— Adding a Custom Defined Protocol Item:

Note: Use the custom defined protocol for reminders that are not included in the list of configured protocol items.

- a. Enter the name of the custom defined protocol or reminder in the Name field.
- b. Click the Select button in the Parameters area. The Select Item Type pop up window displays.

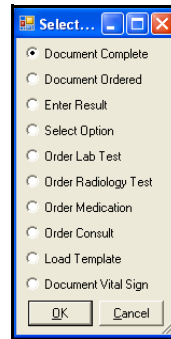


Figure 38–12: Select Item Type Window

- c. Click the radio button next to the desired action to be taken when the specific item is addressed.
 - **Document Complete:** Documents the selected protocol item as having been completed.
 - **Document Order:** Documents the selected protocol item as having been ordered.
 - **Enter Result:**
 - **Select Option:** Action taken is based on the selection.

Note: Options to choose from are in free text and the user can add, delete and order the options on the list.

- **Order Lab Test:** Opens the A/P order entry module and places the order for the selected test.
- **Order Radiology Test:** Opens the A/P order entry module and places the order for the selected test.
- **Order Medication:** Opens the A/P order entry module and places the order for the selected medication.
- **Order Consult:** Opens the A/P order entry module and places the order for the selected consult.

- **Load Template:** Navigates to the S/O module with the selected template loaded. Only one template can be associated with each custom defined protocol item.
 - **Document Vital Sign:** Navigates to the Vital Signs module for entry of vitals data.
- d. Click **OK**.
 - e. Proceed to step 3.

The screenshot shows the 'Registry Setup' window with the 'Protocol Items' tab selected. The 'Custom Defined' section is active, showing a protocol item named 'Documentation Done' with a default action of 'Document Complete'. The 'Schedule' section has 'Timing' set to a dropdown, 'Every' set to a dropdown, 'Due within' set to a dropdown, and 'Duration' set to 'Indefinite'. The 'Optional' section has 'Encounter Terms' set to '0' and a 'Goal' dropdown. A tree view on the right shows the protocol structure: Protocol > Documentation Done: <Schedule not defined> > Document Complete. The 'Autocites', 'Questionnaires', 'Templates', 'Order Sets', and 'Registration' sections are also visible in the tree view.

Figure 38-13: Protocol Items Tab—Custom Defined

3. Click the drop-down next to Timing and select **One Time** or **Recurring** in the Schedule area.
 - a. If One Time is selected, enter a Due within timeframe by entering a numeric value in the first field and clicking the drop-down in the second field and selecting the timeframe: **Visit, Day, Week, Month** or **Year**.
 - b. If Recurring is selected, enter a timeframe by typing a numeric value in the Every field, then click the drop-down and select: **Visit, Day, Week, Month** or **Year**.
 - c. Select a Duration type from the drop-down list.
4. Enter optional encounter terms.
 - a. Click the **Select** button next to the Encounter term field. The Other Therapies Search pop up window displays.

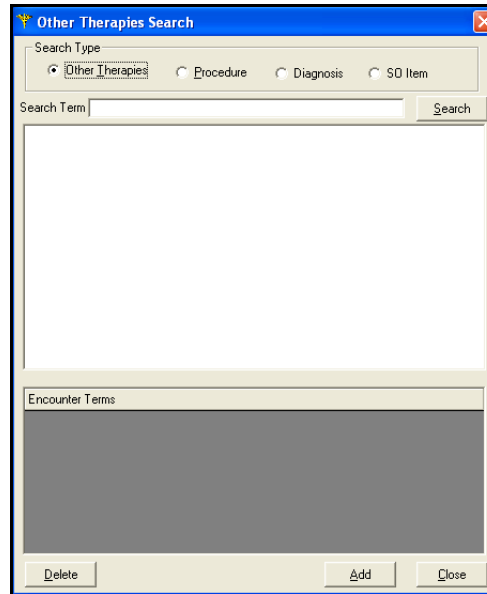


Figure 38–14: Other Therapies Search Window

- b. Select the appropriate Search Type radio button. The name of the window changes to reflect the radio button selection.
 - c. Enter the search term in the field provided.
 - d. Click **Search**. The search results populate the search field.
 - e. Select the search result and click the **Add** button.
 - f. Repeat steps b–e to add additional terms.
 - g. Click the **Close** button. The number of Encounter terms associated with the Protocol item displays in the field next to Encounter terms. To view the Encounter terms associated with the protocol item, click the **Select** button.
5. Enter Goal parameters. Entering goal parameters is does not alert or address the protocol item.
 - a. Select a goal from the Goal drop-down list.
 - b. Type the Goal in the field provided.
 6. Enter optional comments in the Comments field.

Note: Comments will be included in the encounter document when this protocol item is addressed and/or completed.

7. Enter optional web address in the Web Link field if there is a good resource related to the protocol item. This website can be launched by right clicking the reminder in the Reminders pop up window.

- Click **Save** on the Action bar.

Note: You must Save information for each protocol defined.

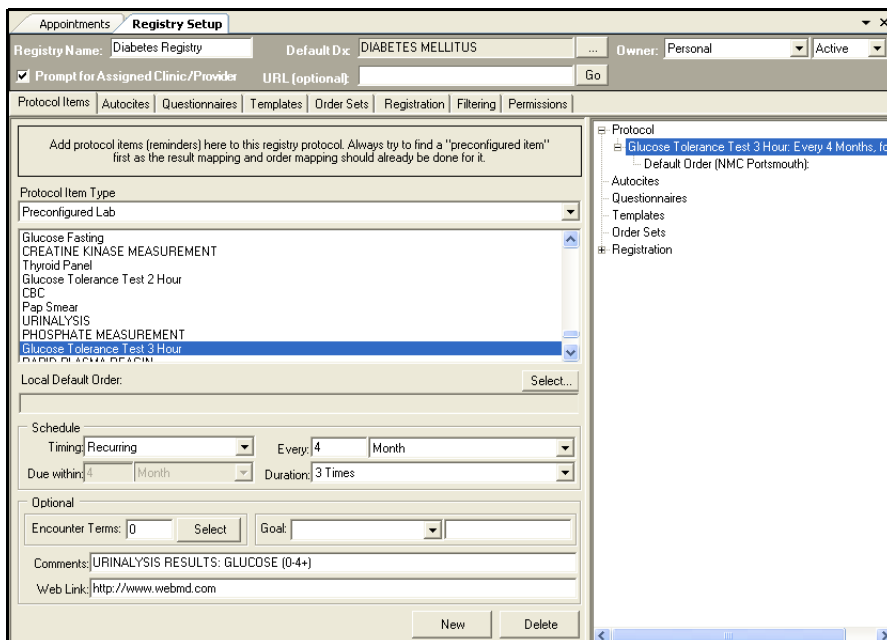


Figure 38–15: Registry Setup—Protocol Item Added

- Repeat steps 1–8 to add additional Protocol Items.

38.4.2 Adding AutoCites to a Registry

Each protocol item a user defines for a registry may be selected to be auto cited in an encounter. The user must select the Registry check box on the Encounter Properties Summary window to include/not include the protocol item information.

Follow the steps below to add AutoCites to a registry:

- Click the AutoCites tab.
- Select the Protocol item you wish to AutoCite from the available protocol items.

Note: Each AutoCites item must be selected and added individually.

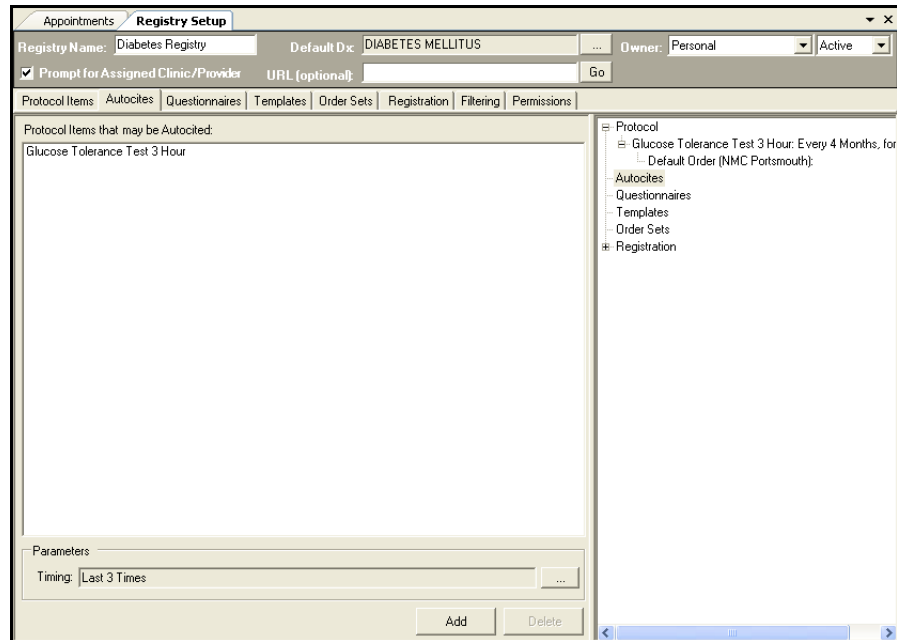


Figure 38–16: AutoCites Tab

3. AutoCites timing can be modified by clicking the ellipsis button next to the timing field. This window allows the user to identify Autocites within a particular time period. The AutoCite Timing Parameters window opens.

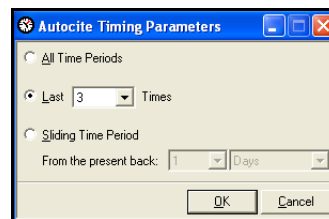


Figure 38–17: AutoCite Timing Parameters Window

4. Select the timing parameters.

Note: If **Last** or **Sliding Time Period** is selected, use the appropriate drop-down menu to select the time range.

5. Click **OK**. The AutoCites Timing Parameters window closes and your selection displays in the Timing field.
6. Click **Add**. The protocol item is added to the AutoCites.
7. Click **Save** on the Action bar.

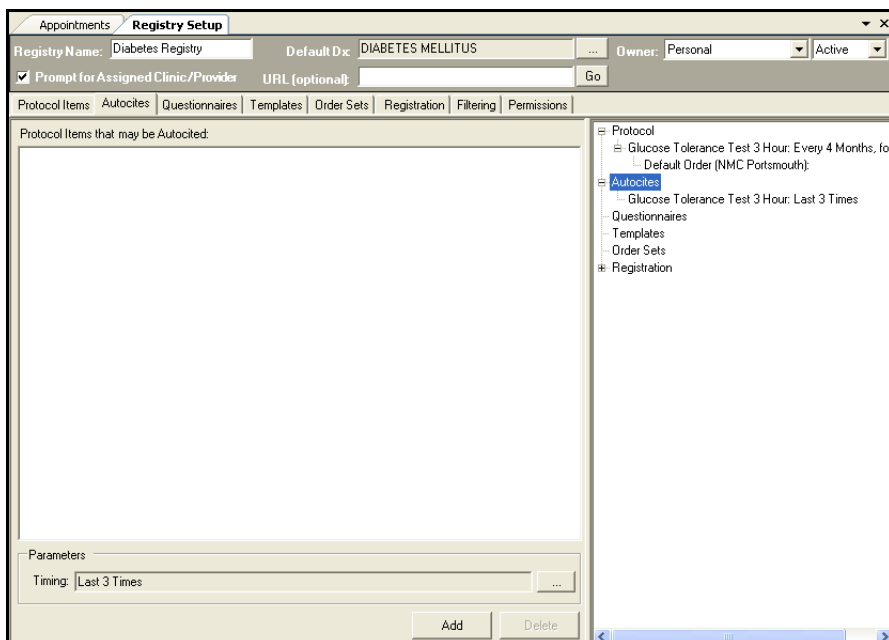


Figure 38–18: Item Added to AutoCites

8. Repeat steps 2–7 to add additional AutoCites.

38.4.3 Adding Questionnaires to a Registry

Questionnaires/Tests selected for a Registry will display in the Patient Questionnaires module under the heading of Registry. The benefit of this feature will allow the user to see that the patient is assigned to a Registry.

Follow the steps below to add questionnaires to a registry:

1. Click the Questionnaires tab.
2. Expand the owner folder and select the questionnaire/test.

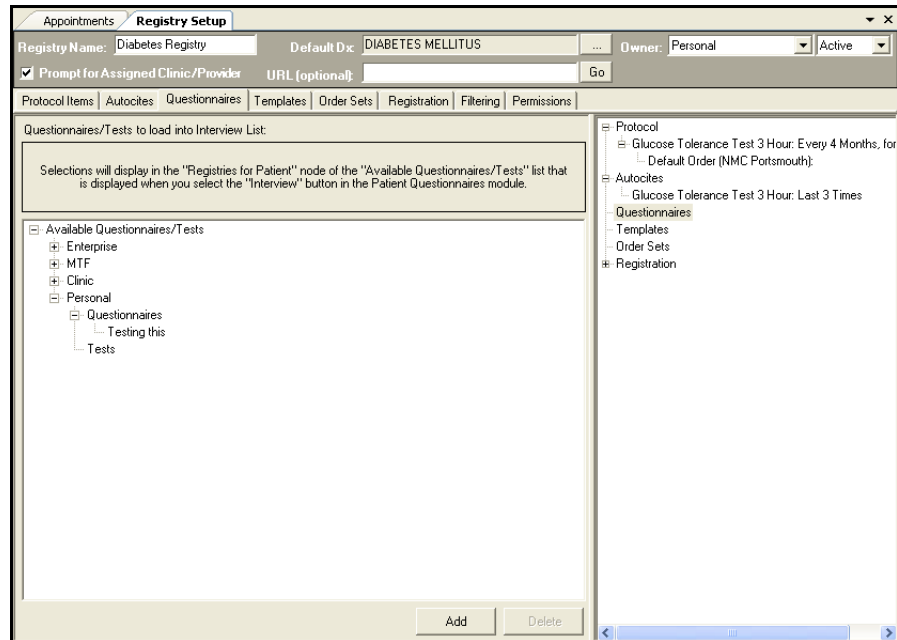


Figure 38–19: Questionnaires Tab

3. Click **Add**. The questionnaire/test is added to the registry.
4. Click **Save** on the Action bar.
5. Repeat the following steps to add more Questionnaires to the Registry.

38.4.4 Adding Templates to a Registry

The Templates selected in the Registry will appear at the top of the user's template favorites list in the S/O and A/P module if the patient is enrolled to the Registry.

Follow the steps below to add templates to a registry:

1. Click the Templates tab.

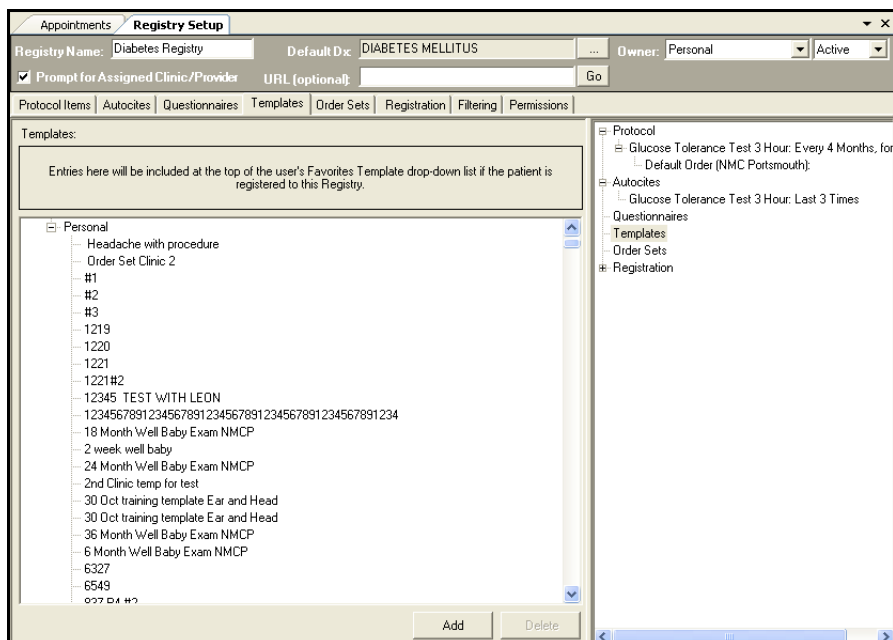


Figure 38–20: Template Tab

2. Select the desired template and click **Add**. The template is added to the right pane.
3. Click **Save** on the Action bar.
4. Repeat the following steps to add more templates to the Registry.

38.4.5 Adding Order Sets to a Registry

The Order Sets selected in the Registry will appear at the top of the user's My Standalone Orders Set list if the patient is enrolled to the Registry.

Follow the steps below to add order sets to a registry:

1. Click the Order Sets tab.
2. Select the desired orders and click **Add**. The orders are added to the right pane.
3. Click **Save** on the Action bar.
4. Repeat the following steps to add more order sets to the Registry.

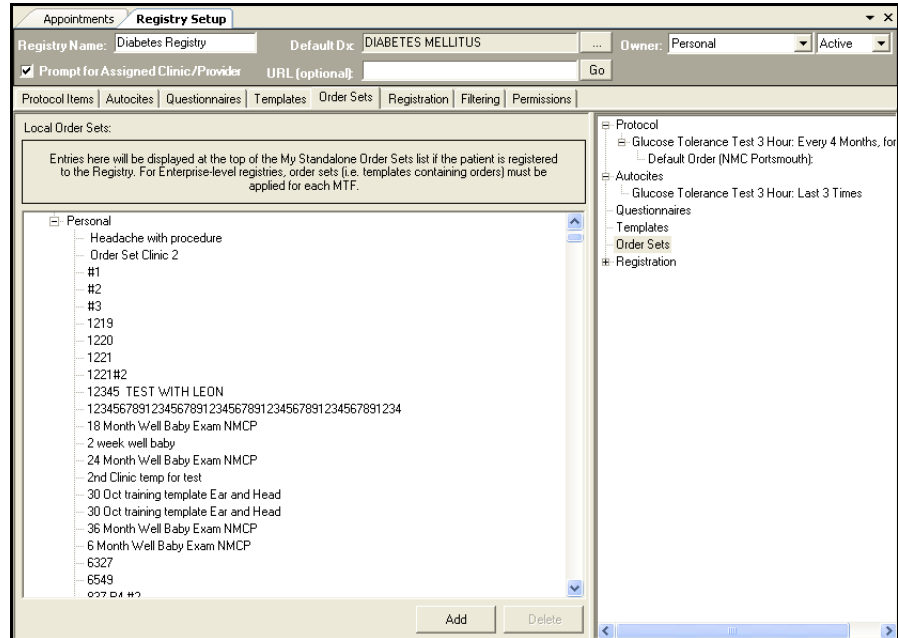


Figure 38–21: Order Sets Tab

38.4.6 Adding Registration Details

Items added in the Registration tab of the Registry Set up module will automatically register a patient to a Registry if a diagnosis, procedure, lab order, med order, rad order and/or a consult order is documented in the encounter being signed, if the patient is not already enrolled in the Registry. The order will trigger the Registry and the patient will automatically be assigned to it.

Follow the steps below to add Registration Details:

1. Click the Registration tab.

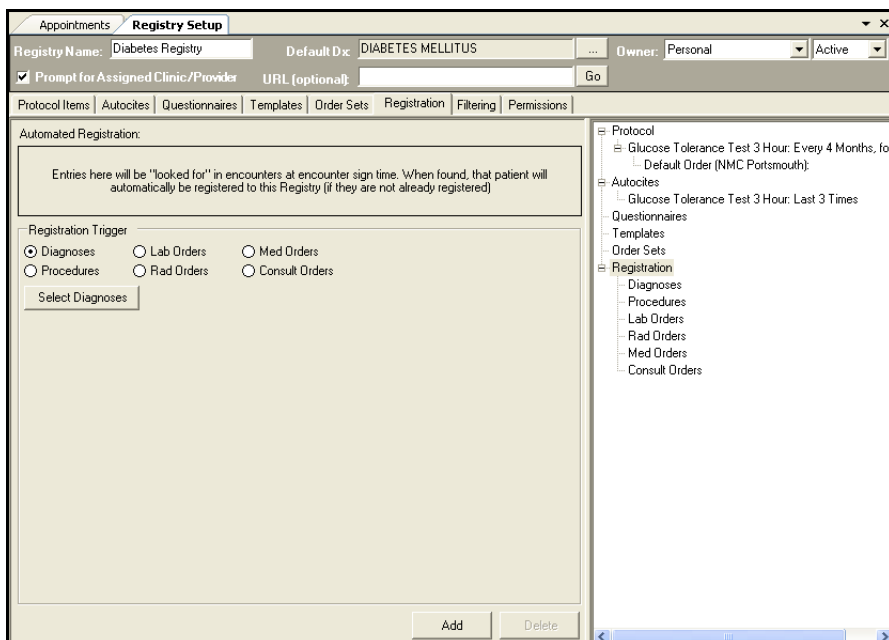


Figure 38–22: Registration Tab

2. Click the Radio button for the Registration trigger. The appropriate search window opens.
 - Diagnoses and Procedures radio buttons:
 - a. Click the **Select Diagnoses** or **Select Procedure** button.
 - b. Type the diagnosis/procedure in the Search Term field.
 - c. Click **Search**. The results populate the search results field.
 - d. Select the diagnosis/procedures from the search results.
 - e. Click **Add**.
 - f. Continue steps a–e until all diagnoses/procedures have been added.
 - g. Click **Close**.
 - Orders Radio buttons
 - a. Click the Order radio button (lab, rad, med, and consult).
 - b. Enter the name of the Order in the Search field.
 - c. Click **Find**. The results populate the search results field.
 - d. Select the Order from the search results.
 - e. Click **Add**.
 - f. Continue steps a–e until all orders have been added.
3. Click **Save** on the Action bar.

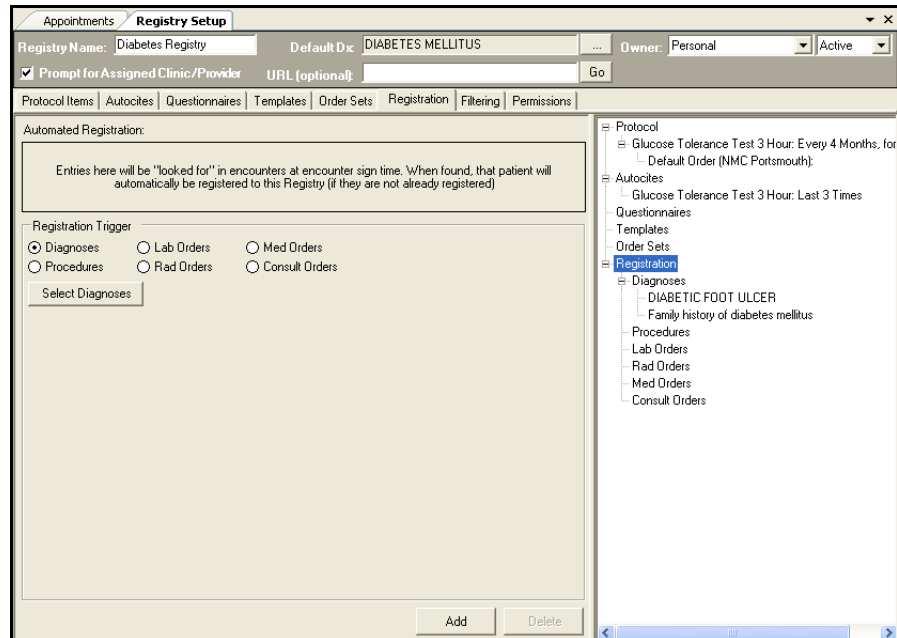


Figure 38–23: Registration Tab

38.4.7 Setting the Registry Filter

A user can set the default filter setting per service (Air Force, Army, and Navy) per Clinic Type (listed by 3-character MEPRs code). If the user selects the default setting to be “on”, then the Reminders list pop-up window will display for the clinics' users upon opening an encounter document; if the setting is “off”, the Reminders list pop-up will not display upon opening an encounter. A local user can then set the default filter setting as on or off per clinic (listed by 4-character MEPRs code). The clinic-specific setting will default based on the corresponding MEPRs Clinic Type default setting. Any modifications to the clinic-specific default settings take precedence over the default per MEPRs Clinic Type setting. The Filters tab can not be used with Personal or Clinic level Registries and only authorized users may access and change MEPRS and Clinic defaults.

To define Enterprise and Clinic Registries:

1. Click the Filtering tab. The Filtering tab displays for the selected Registry.

Registry Name: Diabetes Registry Default Dx: DIABETES MELLITUS Owner: Personal Active

Prompt for Assigned Clinic/Providers URL (optional): Go

Protocol Items | Autocites | Questionnaires | Templates | Order Sets | Registration | Filtering | Permissions

Filtering by Clinic (for Due Reminders Pop-up dialog)

Default by MEPRS

This configuration will determine the default setting (checked = on) for whether the Due Reminders pop-up window will include Registry reminders in the display for a clinic's users. Clinic-specific changes to this default may be set in the "Specific Clinics" list.

AirForce	Army	Navy	MEPRs	Clinic Type
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAA	INTER
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAB	ALLER
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAC	CARDI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAE	DIABE
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAF	ENDO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAG	GASTR
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAH	HEMATOLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAI	HYPERTENSION CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAJ	NEPHROLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAK	NEUROLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAL	OUTPATIENT NUTRITION CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAM	ONCOLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAN	PULMONARY DISEASE CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAO	RHEUMATOLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAP	DERMATOLOGY CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAQ	INFECTIOUS DISEASE CLINIC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAR	PHYSICAL MEDICINE CLINIC

Specific Clinics

This configuration overrides any default by MEPRS setting for the specified clinic. Note: for enterprise-level Registries, this configuration is limited to those with specific MTF-level rights.

On/Off	MEPRs	Clinic
<input type="checkbox"/>	AA0	INT MED FE OBSERVATION
<input type="checkbox"/>	AA5	APV INTERNAL MEDICINE AF
<input type="checkbox"/>	AAA	ADULT ASTHMA FE
<input type="checkbox"/>	AAA	DIABETIC CLINIC FE
<input type="checkbox"/>	AAA	GOOD HEALTH CLINIC
<input type="checkbox"/>	AAA	INT MED FE
<input type="checkbox"/>	BAAA	INTERNAL MEDICINE FE INT M
<input type="checkbox"/>	BAAA	INTERNAL MEDICINE FL
<input type="checkbox"/>	BAAA	LPCM8
<input type="checkbox"/>	BAAA	MTF NMCP INT MED
<input type="checkbox"/>	BAAA	PHARMACY AMBULATORY CLI
<input type="checkbox"/>	BAAA	SASQUATCH CLINIC
<input type="checkbox"/>	BAAA	SMOKING CESSATION FE
<input type="checkbox"/>	BAAV	GULF WAR SYNDROME FE
<input type="checkbox"/>	BABA	ALLERGY CLINIC FE
<input type="checkbox"/>	BABA	ALLERGY CLINIC FL
<input type="checkbox"/>	BABA	ALLERGY NMCP

Clinic Filters are not used with Protocol Items owned by Clinics or Individuals

Figure 38–24: Filter Tab

2. Locate the Default by MEPRS screen in the left panel. A List of clinic types and their 3-letter MEPRs code are displayed, including Service Type (Army, Navy, and Air Force).
3. Mark the Services checkboxes (AirForce, Army, Navy) by MEPRS and Clinic Type.
4. Locate the Specific Clinics screen in the right panel. List of clinics and their 3-letter MEPRs code are displayed, including Service Type (Army, Navy, and Air Force).
5. Mark the **On/Off** checkboxes for Services by MEPRS and Clinic.

38.4.8 Setting the Registry Permissions

The Permissions tab allows you to limit access of a registry to a specific user or group of users.

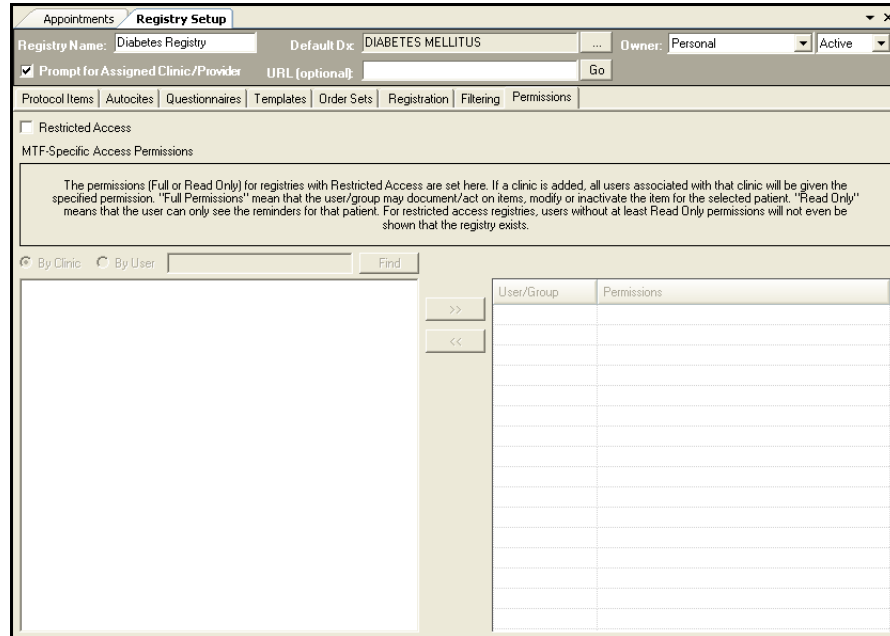


Figure 38–25: Permissions Tab

Follow the steps below to define Restricted Access for a User or Group:

1. Click the Permissions tab.
1. Click the Restricted Access checkbox.
2. Click the **By Clinic** or **By User** radio button.
3. Enter the clinic or user in the search field and click **Find**.
4. Select the clinic/user from the search results.
5. Click the **Right arrow** to add to the User Group/Permissions pane.
6. Click in the Permissions field to activate a drop-down arrow.
7. Click the drop-down arrow and select the rights or permissions.

Note: Options are **Read Only** or **Full**. **Full** permissions means that the user/group may act on items, modify items or inactivate the registry for the patient. **Read Only** means that the user can only see reminders for that patient. Users with no rights selected will not even be shown that the Registry exists.

38.5 Deleting an Item from a Registry

To delete an item from a registry:

1. Select the item from the preview pane inside the Registry Setup module. The tab in which the item belongs will automatically open.
2. Click the **Delete** button from the appropriate tab.

38.6 Deleting a Registration

Follow the steps below to delete a registration:

1. Select a Registry from the list.
2. Click **Delete** from the Actions bar.

38.7 Patient Registry Module Overview

The Patient Registries module allows a user to view registries and its components and assign patients to a Registry or Clinical Practice Guideline (CPG). A list of registries is displayed per owner type (i.e. Enterprise, Site, Clinic, and Personal). If an Enterprise-level Registry is selected, only the list of patients enrolled to the current facility display. Unauthorized users will not be able to see a Secured Access patient in the Patient Registries module.

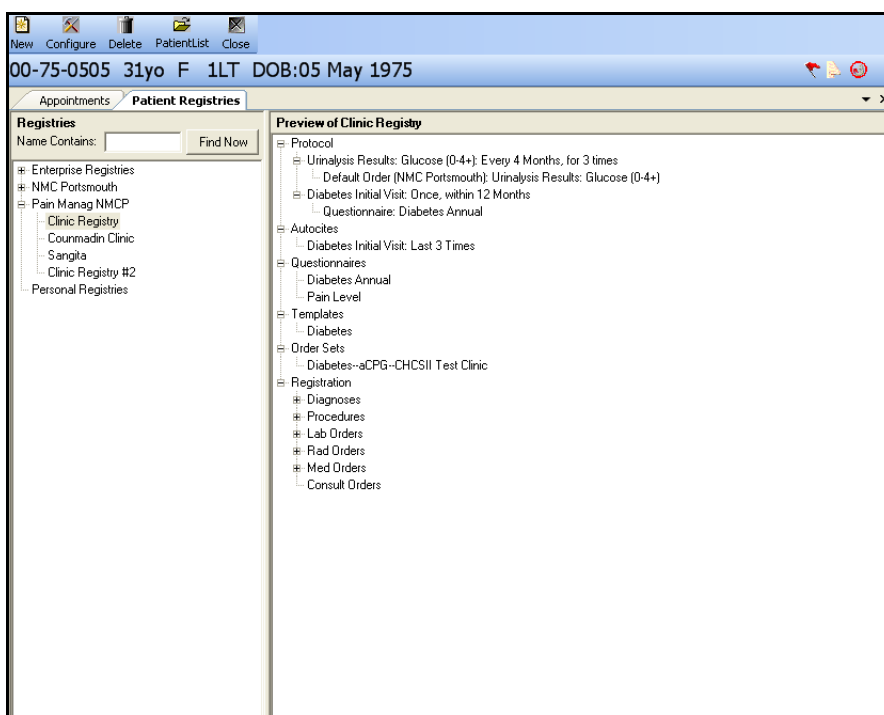


Figure 38–26: Military Clinical Desktop—Patient Registries Module

38.7.1 Patient Registries—In More Depth

Patients can be assigned and unassigned to registries automatically and manually. For example, patients that are 6 months old or younger and have not had a Newborn Metabolic Screening (NMS) test will automatically be assigned to the Enterprise NMS registry. If connection to the CDR is lost, the module will close and data will not be saved. Once the system is in Failover mode, Patient Registries module can not be accessed until connection to the CDR is re-established.

38.8 Viewing Registry Contents

A Registry must be selected in order to see its contents.

To Search for a Registry:

1. Select the Registry Setup module from the Folder List.
2. Type name of Registry in the Name Contains field.
3. Click **Find Now** button. The search results populate the Registry pane.

To view the Registry contents:

1. Select the Registry from the Registry pane.
2. Preview what's in the Registry from the Preview of Registry Configuration pane on the right.

38.9 Viewing Patients Added to a Registry

To view patients added to a registry:

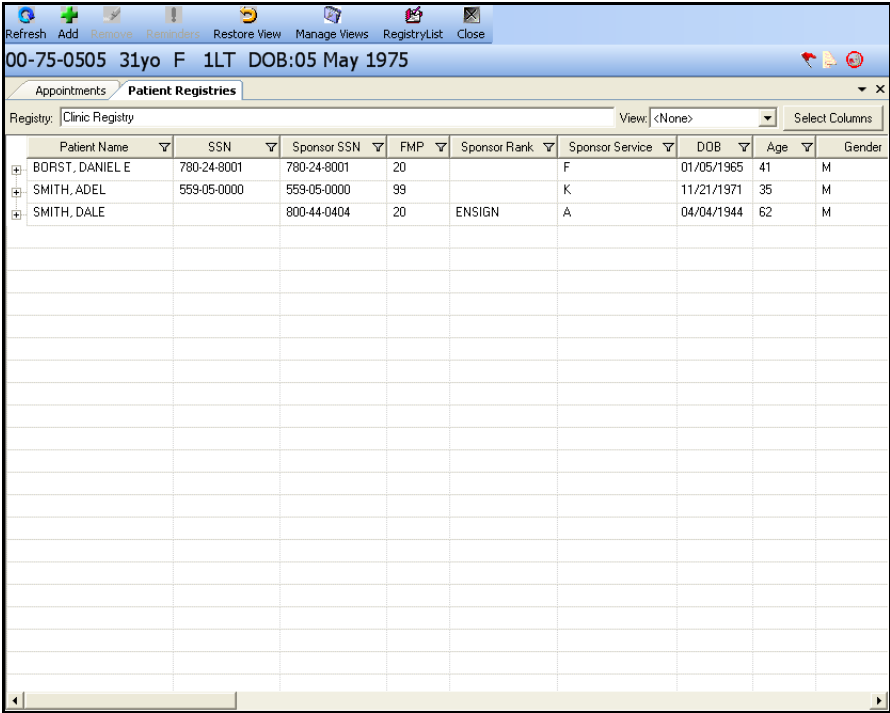
1. Select Patient Registry module from the Folder List.
2. Search for and select the Registry from the Registry Pane.
3. Click **PatientList** from the Action bar.
4. View the patients enrolled in the selected Registry.

38.10 Managing Views

The Patient Registry list screen in the Patient Registry module can be personalized to display the user's preferences. Any user with read privileges can manage their view of the Patient Registry list; however, a user must have "R" (Read), "W" (Write), and "D" (Delete) privileges to the registry in order to save a Shared View.

Follow the steps below to manage a view:

1. Select the Registry from the Registry pane or search for the Registry.
2. Click **PatientList** from the Action bar. The Patient List pane displays.



	Patient Name	SSN	Sponsor SSN	FMP	Sponsor Rank	Sponsor Service	DDB	Age	Gender
+	BORST, DANIEL E	780-24-8001	780-24-8001	20		F	01/05/1965	41	M
+	SMITH, ADEL	559-05-0000	559-05-0000	99		K	11/21/1971	35	M
+	SMITH, DALE		800-44-0404	20	ENSIGN	A	04/04/1944	62	M

Figure 38–27: Patient List

3. Click **Manage Views** on the Actions bar. The Registry Views window opens.

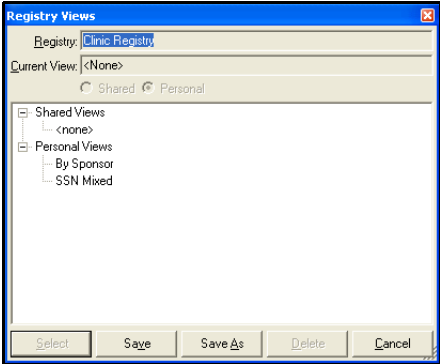


Figure 38–28: Registry Views Window

4. Click **Save** or **Save As**. The Save Registry View window Opens.

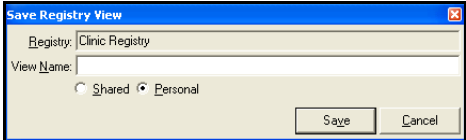


Figure 38–29: Save Registry View Window

Note: If the View is new, the View Name field will be blank. If the View has been previously named, the previously saved name will display.

5. Enter the name or update the name in the View Name field.
6. Click **Save**.

Note: Selecting **Cancel** closes the dialog without saving the displayed view.

38.10.1 Using the View Drop-Down List

The drop-down list next to the Views field will include all shared views and personal views that have been used for that registry. To quickly access a previously saved view, click the drop-down list button and select the view.

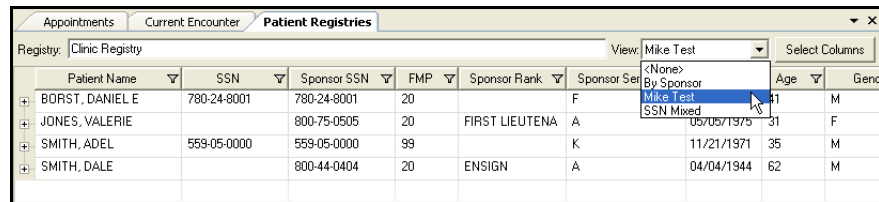


Figure 38–30: View Drop-Down List

38.10.2 Working with Columns

The **Select Column** button allows a user to choose the columns that display for the Registry Patient List. When the Select Columns button is selected, a list of options display for the column. If the user checks the check box beside a column title the column will be displayed. If the user unchecks the check box beside a column the title column is hidden.

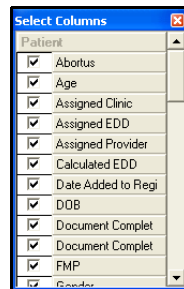


Figure 38–31: Select Column Dialog Box

The following is a list of column title options:

- Patient Name
- SSN
- Sponsor SSN
- FMP
- Sponsor Rank

-
- Sponsor Service
 - Patient Category
 - DOB
 - Age
 - Gender
 - Race
 - Home Phone
 - Work Phone
 - Date Added to Registry
 - Pregnant Indicator (checkbox from Female Only Data)
 - Pregnant Status (Risk level)
 - LMP
 - Calculated EDD (based on LMP)
 - Assigned EDD (estimated) current calculated Gestational Age (GA) based upon Assigned EDD
 - Gestational Age
 - G (Gravida)
 - T (Term)
 - P (Preterm)
 - A (Abortus)
 - LC (Living Children)
 - Assigned Clinic
 - Assigned Provider
 - PCM
 - Local Info/Comments
 - Protocol items from the Registry

Note: The Date column and a Result column with the most recent result for each protocol item is displayed which is the same information that displays within the Reminders window.

38.10.2.1 Sorting Columns

To sort column headings, the user must click the column title. The first click will sort in ascending order. The second click will sort in descending order. An arrow on the column header will indicate sort order. This sort order does not persist for the user. By

default, the order is ascending by the first column selected and then by the second column selected by the user.

38.10.2.2 Changing the Order of Registry Columns

The order that the columns display in the Patient Registry list can be moved by dragging and dropping the column where the user wants to see it displayed on the screen.

38.10.2.3 Adjusting Column Width

The column width can be adjusted by clicking on the column boundary in the column title field and dragging the column boundary to the desired width.

38.10.2.4 Filtering Columns

There is a filter icon for each column that is displayed in the Registry Patient List. A funnel is displayed to the right of the column title and when the user selects this icon the user is prompted to select a predefined filter, a column value, or to define a new filter by selecting the Custom option. When a filter has been used for a column the filter icon displays darkened. The filter options are:

- **All:** include all values
- **Custom:** a screen is displayed that allows the user to enter filter criteria
- **Blanks:** include blank fields only
- **Non-Blanks:** include non blank fields only
- Any items listed in that column

Note: Click the **Restore View** button to restore the default view.

38.10.2.5 Custom Filter Option

The Custom Filter option allows the user to define a filter condition.

Follow the steps below to customize the column:

1. Click the **funnel icon** next to the column title.

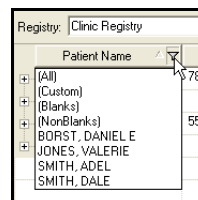


Figure 38–32: Funnel Drop-Down List

2. Select **Custom**. The Enter Filter Criteria window opens.

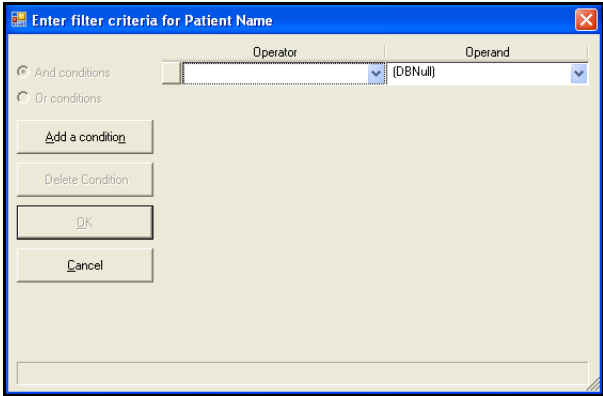


Figure 38–33: Enter Filter Criteria for Patient Window

3. Select an operand from the Operand drop-down list or type an operand directly into the operand field.
4. Click the **Add a condition** button to add additional conditions to the filter.
5. Select the condition from the Operator drop-down list.
6. Select the **And conditions** or **Or conditions** radio button to specify the condition.

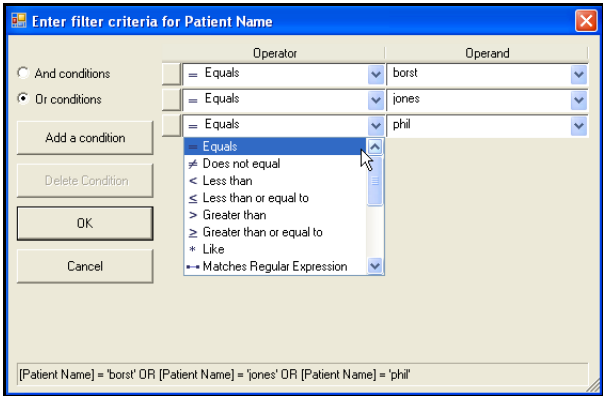


Figure 38–34: And Conditions Added to Filter

7. Select **OK**. Selecting **Cancel** cancels the Enter Filter Criteria without any filtering to the Registry Patient list. Notice that once the filter is applied the funnel icon is shaded.



Figure 38–35: Shaded Funnel Icon

Note: Click **Restore View** on the Action bar to restore the default view.

38.10.3 Using the Right Click Menu

Right-clicking on the Patient List will bring up a menu with the following items:

- View Patient Reminders
- Assign Clinic/Provider
- Set as Selected Patient
- Deactivate Patient
- Save Current View
- Save Current View As
- Delete Current View

38.10.3.1 Assigning a Clinic and a Provider to a Patient Registry

When the Assign Clinic/Provider option from the right-click menu of the Registry Patient List screen is selected, the Assign Clinic/Provider dialog displays a Clinic list and a Provider list. Only one Assigned Clinic and one Assigned Provider can be selected. The default clinic will be the current Clinic assigned to the workstation but all active Clinics in the current host will display for selection. The Provider List is the list of providers associated with the selected clinic therefore, there is no default Provider option.

Note: Selecting **OK** saves the selected information and closes the dialog. Selecting **Cancel** closes the dialog without saving any changes.

38.11 Adding a Patient to the Registry

A patient record has to be loaded to the desktop before you can add him/her to a registry.

To add a patient to a registry:

1. Load a patient record to the desktop.
2. Select the registry from the Registry List.
3. Click **PatientList** on the Action bar. The Registry Patient List displays.

Patient Name	SSN	Sponsor SSN	FMP	Sponsor Rank	Sponsor Service	DOB	Age	Gender
BORST, DANIEL E	780-24-8001	780-24-8001	20		F	01/05/1965	41	M
SMITH, ADEL	559-05-0000	559-05-0000	99		K	11/21/1971	35	M
SMITH, DALE		800-44-0404	20	ENSIGN	A	04/04/1944	62	M

Figure 38–36: Patient List

4. Click **Add** on the Action bar. The Enrollment Information window opens.

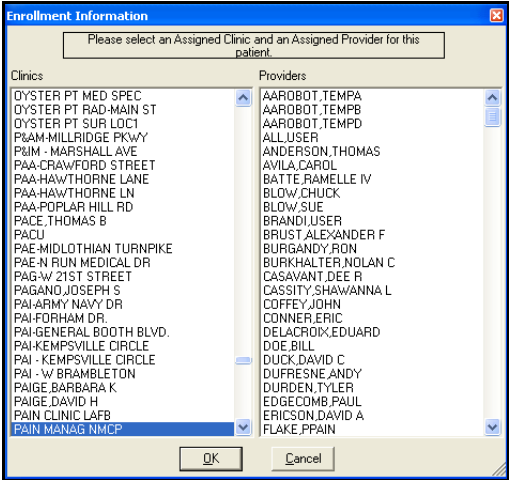
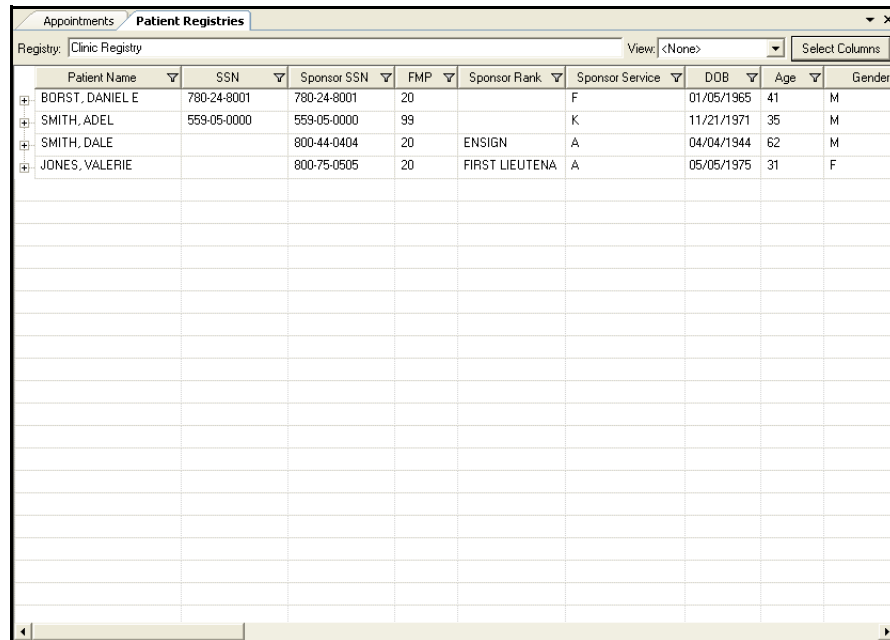


Figure 38–37: Enrollment Information Window

- 5. Select the Clinic from the list of available clinics.
- 6. Select the provider from the list of available providers.
- 7. Click **OK**. The patient is added to the list.



Patient Name	SSN	Sponsor SSN	FMP	Sponsor Rank	Sponsor Service	DOB	Age	Gender
BORST, DANIEL E	780-24-8001	780-24-8001	20		F	01/05/1965	41	M
SMITH, ADEL	559-05-0000	559-05-0000	99		K	11/21/1971	35	M
SMITH, DALE		800-44-0404	20	ENSIGN	A	04/04/1944	62	M
JONES, VALERIE		800-75-0505	20	FIRST LIEUTENA	A	05/05/1975	31	F

Figure 38–38: Patient Added to Patient List

38.12 Removing a Patient from the Registry

To remove patients from the Registry list:

1. Select the Registry from the Registry pane or search for the Registry.
2. Click **PatientList** from the Action bar. The Patient List pane displays.
3. Select the patient from the list.
4. Click **Remove** from the Action bar. The Patient Registry List pop-up window opens.

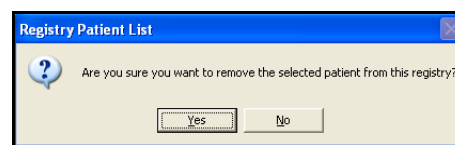


Figure 38–39: Patient List Pop-up Window

5. Click **Yes** from the Registry Patient List popup window. The patient is removed from the registry.

38.13 Accessing Patient Reminders

Users can view the patient's Reminders by double-clicking on a patient on the Registry list or by clicking Reminders from the Action bar. Users can choose to view all Reminders for all Registries to which the patient is registered (for which the user has permissions). The list of Reminders will be filtered to display the patient's Reminders for the selected Registry.

Follow the steps below to access patient reminders:

1. Select the Registry from the Registry pane or search for the Registry.
2. Click **PatientList** from the Actions bar. The Patient List pane displays.

Patient Name	SSN	Sponsor SSN	FMP	Sponsor Rank	Sponsor Service	DOB	Age	Gender
BORST, DANIEL E	780-24-8001	780-24-8001	20		F	01/05/1965	41	M
SMITH, ADEL	559-05-0000	559-05-0000	99		K	11/21/1971	35	M
SMITH, DALE		800-44-0404	20	ENSIGN	A	04/04/1944	62	M
JONES, VALERIE		800-75-0505	20	FIRST LIEUTENA	A	05/05/1975	31	F

Figure 38–40: Patient List

3. Select a patient from the list.
4. Click **Reminders** from the Action bar. The Reminders window opens.

Select	Modify	Reminder	Ordered	Due	Default Order/Documentation Details	Default Dx	Registry
<input type="checkbox"/>	<input type="checkbox"/>	Select Option test		12/12/2006	Select Option		Clinic Registry

Filtered for this Clinic
 Unfiltered
 All Reminders
 Only This Registry
 All Registries

Due
 Due within 1 month
 Addressed Today or Ordered, but not resulted
 Deactivated
 Series Completed
 Show Most Recent Results

 * Default wellness reminder configurations are based on the US Preventive Services Task Force (USPSTF)

Figure 38–41: Reminders Pop-up Window

38.14 Restoring the Patient List View

The Registry Patient list default view that displays in the Patient Registry module can be restored if it has been changed or modified.

Follow the steps below to Restore a Patient List view:

1. Open the Registry Patient List screen.
2. Click **Restore View** from the actions bar. The default view of the Patient list displays.