



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **ICare: A Population Management Tool**

## Announcement and Agenda

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Office of Information Technology (OIT)  
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## 1.0 General Information

### 1.1 Purpose of Training

This is an intensive three day hands-on training on the iCare population management software. This course is designed to teach participants about the unique features and functionalities of iCare, including:

- Care Management Event Tracking(CMET)
- HIV Management System
- Meaningful Use (MU)
- Improved Patient Care (IPC)

**Participants will:**

- Use iCare to identify groups of patients who share user-defined characteristics (e.g., Age, Diagnosis, Community, Scheduled Appointments, Women's Health Visits, Patients Assigned to a Provider) and create panels (patient lists) based on user definitions.
- Customize panel layouts, settings, and views of diverse patient data to identify care needs and manage and track clinical reminders and National Performance Measures.
- Use the MU functionalities to track provider and facility progress toward achieving Meaningful Use Performance and Clinical Quality Objectives.
- Use iCare for designating IPC microsystems and automated IPC data collection and reporting to support the IHS Improving Patient Care Program.
- Use the CMET functions to electronically track and manage certain pre-defined events related to breast, cervical, colon, and skeletal health.

**Hands-on practice includes, but is not limited to:**

- Creating iCare panels based on a variety of clinical scenarios and exercises
- Setting up user preferences, iCare site parameters, and user access
- Creating multiple layout templates
- Entering and editing patient data in the patient record
- Batch processing of normal pap smears and mammogram screenings
- Identifying patient care needs for populations and individual patients
- Tracking the incidence of communicable diseases and suicidal behaviors
- Identifying unmet performance and meaningful use measures
- Creating IPC Microsystems

The training consists of lecture with PowerPoint presentations, demonstration of the tool, and hands-on exercises using individual computer terminals and a simulated training database.

## 1.2 Prerequisites

None

## 1.3 Intended Audience

Physicians, Nurses, Dentists, Pharmacists, Registered Dieticians, Therapists, Clinical Application Coordinators, GPRA, IPC, and MU Coordinators, Case Managers, Medical Records, and Health Informaticists

## 1.4 Course Material and References

### 1.4.1 At the IHS RPMS FTP Site

The following materials may be downloaded from the RPMS Training FTP site at <ftp://ftp.ihs.gov/pubs/RPMS/Training/ThisCourse/>:

- Course Agenda (this document)
- PowerPoint Presentation
- Buttons Handout
- Pre-Test
- Exercises
- CMET Exercises
- Mail Merge Instructions
- Glossary

### 1.4.2 At the IHS RPMS Website

- iCare User Manual Version 2.2  
([http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi\\_022u.pdf](http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_022u.pdf) )
- Version 2.3 Supplemental User Guide for Basic Functionality Enhancements  
([http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi\\_023u\\_enhance.pdf](http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_enhance.pdf))
- Version 2.3 Supplemental User Guide for Improving Patient Care  
([http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi\\_023u\\_ipc.pdf](http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_ipc.pdf))
- Version 2.3 Supplemental User Guide for Meaningful Use  
([http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi\\_023u\\_mu.pdf](http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_mu.pdf))

If a web link fails to open the document, browse to:  
[http://www.ihs.gov/RPMS/index.cfm?module=Applications&option=View&AC\\_ID=0](http://www.ihs.gov/RPMS/index.cfm?module=Applications&option=View&AC_ID=0) and select the **iCare Population Management GUI (BQI)** option to locate the newest version.

## 2.0 Learning Objectives

1. Use case scenarios and population management techniques to define populations of patients and create user-defined patient panels with customized layouts and views.
2. Describe the iCare setup, user access set-up, user preference set-up, site parameters set-up, taxonomy maintenance.
3. Navigate the tabs on Main Window, Panel View, and Patient Record views using iCare and Windows Based Tools to view, sort, filter, export, add, and edit patient and population clinical data.
4. Track progress toward meeting Meaningful Use Performance and Clinical Quality Measures for Eligible Providers and Hospitals/CAH.
5. Highlight the status of key clinical reminders and quality performance measures for populations and individual patients.
6. Track and manage CMET events.
7. Optimize IPC workflow.
8. Identify practical uses of iCare.

## 3.0 Detailed Agenda

### 3.1 Day 1

Topic	Duration
<b>Welcome:</b> <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Pre-test</li> <li>• Day One Learning Objectives, Agenda, Training Materials</li> <li>• Identify Participant Needs and Expectations</li> </ul>	30 min.
<b>iCare Overview:</b> <ul style="list-style-type: none"> <li>• Current Features</li> <li>• Practical Uses of iCare</li> </ul>	30 min.
<b>Getting Started-Demo and Hands-On:</b> <ul style="list-style-type: none"> <li>• Your First Log-In</li> <li>• User Preference Wizard</li> <li>• Community Alerts</li> <li>• Exercise 1-Create a "Community Alert Detail" Panel</li> </ul>	30 min.
<b>Break</b>	15 min.
<b>Creating Patient Panels- Demo and Hands-On</b> <ul style="list-style-type: none"> <li>• Main iCare Window-Panel List Tab</li> <li>• User-defined Panel Name and Description</li> <li>• Define populations using iCare Search Options and Filters</li> <li>• Create Panels-Exercises: <ul style="list-style-type: none"> <li>– 2: Panel of Elders in Big Y and Big Cove Community</li> <li>– 3: Panel of Patients assigned to a DPCP</li> <li>– 4: Panel of Diabetic Patients</li> <li>– 5: Panel of Asthmatic Patients</li> <li>– 6: Panel of Scheduled Appointments in Women's Health</li> <li>– 7: Empanelling Patients</li> </ul> </li> </ul>	90 min.
<b>Lunch</b>	60 min.
<b>Cont. Creating Patient Panels-Demo and Hands-On</b> <ul style="list-style-type: none"> <li>• Customize Panel Layouts</li> <li>• Share and Auto-Repopulate</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 8: Select Your Panel's Layouts</li> <li>– 9: Share A panel</li> <li>– 10: Auto-Repopulate</li> <li>– 11: Modify Panel Layouts</li> </ul> </li> </ul>	90 min.
<b>Break</b>	15 min.

Topic	Duration
<b>Navigate the Main Window Tabs-Demo and Hands-On 75 minutes</b> <ul style="list-style-type: none"> <li>• View Main View Tabs, Menus, Tools, Function buttons</li> <li>• iCare Resources</li> <li>• iCare Site Parameters</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 12: Navigate the Main Window</li> <li>– 13: Quick Patient Search</li> <li>– 14: Create Layout templates</li> <li>– 15: Unmet Site Level Performance Measures</li> </ul> </li> </ul>	75 min.
<b>Modify User Preferences-Demo and Hands-On 45 minutes</b> <ul style="list-style-type: none"> <li>• Define My Patients</li> <li>• Set up Flags and Community Alerts</li> <li>• Select Patient Record and Startup Views</li> <li>• Layout templates</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 16: Modify User Preferences</li> <li>– 17: Create a My Patients Panel</li> </ul> </li> </ul>	45 min.
<b>Review, Questions, and Adjourn</b>	15 min.

### 3.2 Day 2

Topic	Duration
<b>Day Two Overview:</b> <ul style="list-style-type: none"> <li>• Day One Review and Questions</li> <li>• Day Two Learning Objectives and Agenda</li> </ul>	30 min.
<b>Navigate the Panel View-Demo and Hands-On</b> <ul style="list-style-type: none"> <li>• View Tab specific menu options, toolbars, and function buttons</li> <li>• Exercise18: Manage Clinical Performance Data for a Diabetic Population of Elders</li> </ul>	60 min.
<b>Break</b>	15 min.
<b>Cont. Navigating the Panel View-Demo and Hands-On</b> <ul style="list-style-type: none"> <li>• View HIV/AIDS and Asthma Care Management Data</li> <li>• Quality of Care Reports</li> <li>• Edit diagnostic tag status: <ul style="list-style-type: none"> <li>– Export Selected Rows to Excel</li> <li>– Exercise 19: Complete a Mail Merge</li> </ul> </li> </ul>	90 min.
<b>Lunch</b>	60 min.
<b>Assign User Access-Demo</b> <ul style="list-style-type: none"> <li>• iCare Package Manager, Editor, Taxonomy Editor</li> <li>• Taxonomy Management</li> </ul>	30 min.



Topic	Duration
<b>Navigate the Patient Record-Demo and Hands-On</b> <ul style="list-style-type: none"> <li>• Navigate patient record tabs and fields</li> <li>• Edit demographic, reproductive, and family HX data</li> <li>• Edit DPCP providers</li> <li>• Display Summary and Supplement reports</li> <li>• Enter historical event PCC data</li> <li>• Add/ Edit HMS Care Management data</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 20: Add a TIU note</li> <li>– 21: Add a historical event</li> <li>– 22: Add Demographic data</li> </ul> </li> </ul>	75 min.
<b>Break</b>	15 min.
<b>Finish Independent Exercises/Scenarios</b> <ul style="list-style-type: none"> <li>• Exercises: <ul style="list-style-type: none"> <li>– 23: Modified Asthma Panel-Asthma Triggers and Meds</li> <li>– 24: Elders Panel National Measures</li> <li>– 25: KUProvider, AJ Drug Screen-In House lab test</li> <li>– 26: HIV screenings for Prenatals</li> </ul> </li> <li>• Participant led discussion on populations to identify and manage</li> </ul>	90 min.
<b>Review, Questions, and Adjourn</b>	15 min.

### 3.3 Day 3

Topic	Duration
<b>Day Three Overview:</b> <ul style="list-style-type: none"> <li>• Day One and Two Review and Questions</li> <li>• Day Three Learning Objectives and Agenda</li> </ul>	15 min.
<b>Meaningful Use-Demo and Hands On:</b> <ul style="list-style-type: none"> <li>• MU Performance and Clinical Quality Measures</li> <li>• MU Site Parameters Set-Up</li> <li>• Exercise 27: MU CQ Measures</li> </ul>	60 min.
<b>Break</b>	15 min.
<b>Improving Patient Care-Demo and Hands On:</b> <ul style="list-style-type: none"> <li>• IPC microsystems</li> <li>• IPC views</li> <li>• IPC Site Parameters</li> <li>• Exercises</li> </ul>	60 min.
<b>CMET Overview:</b> <ul style="list-style-type: none"> <li>• CMET Pre-defined Events-Data Mining</li> <li>• CMET Workflow</li> <li>• CMET Views</li> </ul>	45 min.
<b>Lunch</b>	60 min.

<b>Topic</b>	<b>Duration</b>
<b>CMET Patient Record-Demo and Hands-On:</b> <ul style="list-style-type: none"> <li>• Queued Events, Tracked Events, Follow-Up Events, Past Events</li> <li>• CMET worksheet</li> <li>• CMET Reminders</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 1: Tracking a CMET Event in the Patient Record</li> <li>– 2: Reopen a Closed Event</li> </ul> </li> </ul>	75 min.
<b>Break</b>	15 min.
<b>CMET Panel View-Managing CMET events for a population:</b> <ul style="list-style-type: none"> <li>• CMET Sub-Tabs-Queued Events, Tracked Events, and Follow-Up Events</li> <li>• CMET Site parameters and User preferences</li> <li>• Customize CMET and Reminders layouts</li> <li>• Batch Processing</li> <li>• Working with columns to sort and filter CMET data</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 3: Batch process normal mammogram and pap smears</li> <li>– 4: Set up CMET filters for CMET sub-tabs in User Preferences</li> </ul> </li> </ul>	90 min.
<b>CMET Main View-Managing CMET events for a site:</b> <ul style="list-style-type: none"> <li>• CMET Queued Events, Tracked Events, and Follow-Up Events</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 5: Display Events using optional CMET filters in the Main View</li> <li>– 6: Create a Panel of Patients Needing follow-up mammogram screening</li> </ul> </li> </ul>	45 min.
<b>Course Wrap-Up:</b> <ul style="list-style-type: none"> <li>• Questions</li> <li>• Post test</li> <li>• Post course evaluation</li> </ul>	15 min.