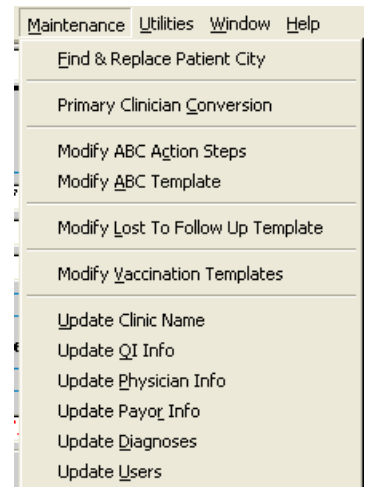


## F. Maintenance

The Maintenance menu item provides the following options:



**Find & Replace Patient City** – Allows for a batch change of one or more spellings of a city to be replaced with one corrected spelling.

1. Select the **city** (cities) by high-lighting them.
2. Click the **Search** button
3. Input the desired text in the **field** Replace with
4. Click the **Replace** button to complete the task.
5. Close the form by clicking on the red "x" in upper right hand corner.

**Find and Replace City**

To Search  
Specify your search criteria below and click the Search button.

To Sort Search Results  
Click on the column headers to sort search results.

City (REQUIRED)  
TERRY  
**TESTCITY**  
THERMOPOLIS  
THORNTON  
TIGARD  
TILLAMOOK  
TORRINGTON

State (OPTIONAL)

Search Clear

# of matching records:  
1

Replace with:  
HERE AND THERE

Medical Record #	Patient Name	DOB	Address	City	State	Zip
9xw88ss7	DOE, JANE C	10/18/19	211 S SOMEWHERE DR	TESTCITY	MT	59102

**Primary Clinician Conversion** – Allows for a batch change of multiple patients to the desired physician.

5. Select the physician from the "Update Patients of Physician" dropdown box. Once a physician has been selected, the "List of Patients" box will be refreshed with the selected physician's patients.
6. Select the physician from the "Select Physician" dropdown box to whom the patients are to be transferred.
7. Double click on each of the patients on the left side to move over to the right side to change the primary physician association.
8. When at least one patient in the "Selected Patients" box and a physician has been selected in the "Select Physician" box, click on the "Update Patient Physician" button to change each selected patient's physician to the selected physician.

Primary Physician Conversion

Update Patients of Physician TO Select Physician

LEWIS, ANDY

List of Patients

ETHERTON, GEORGE  
SMITH, RAYMOND

Selected Patients

Update Patient Physician Cancel

**Modify ABC Action Steps** – Allows the user to modify the text of the ABC action steps and customize them as needed.

As you will note in the instructions, you may change the wording of any of the Action Steps listed. DQCMS also offers the ability to customize the 7th Action Step to the patient population to whom you will be sending this letter.

**Warning:** Modifications to the action steps are **permanent**.

**Modify ABC Template** – Allows the user to modify the Opening and closing text of the ABC letter. Any changes made are **permanently** saved to the ABC letter template.

**DQCMS offers the opportunity to edit the opening and/or closing of the letter.**

### Opening of ABC Letter:

Step 1: Click on Opening and make appropriate changes to text.

Step 2: Remember to insert the clinic name in the text.

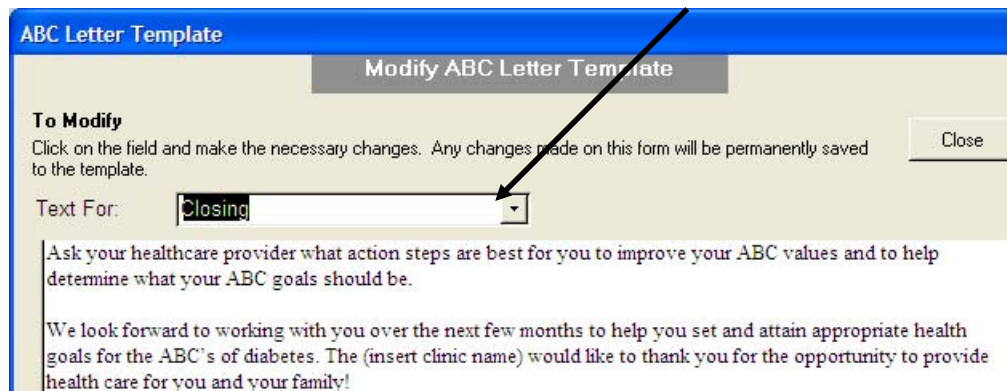
Step 3: Click “Close” button when all edits are completed.

### Closing of ABC Letter:

Step 1: Click on Closing and make appropriate changes to text.

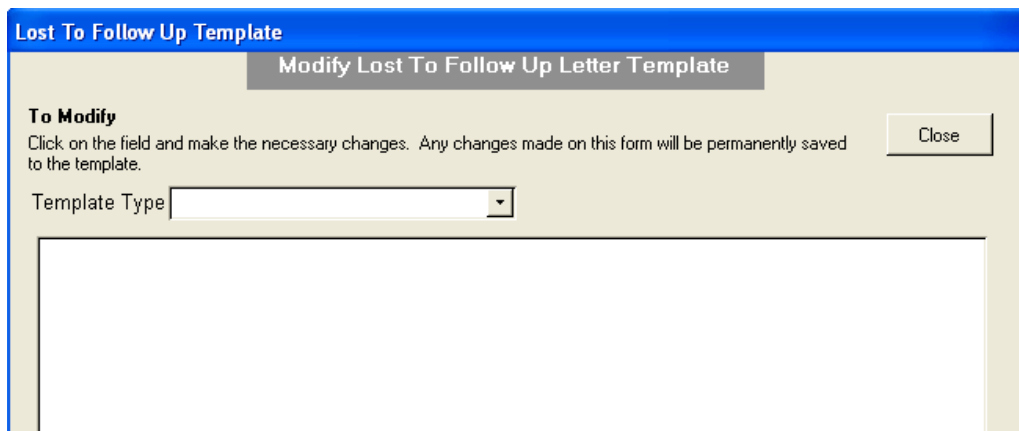
Step 2: Remember to insert the clinic name in the text.

Step 3: Click “Close” button when all edits are completed.



The screenshot shows a web interface titled "ABC Letter Template" with a sub-header "Modify ABC Letter Template". Under the heading "To Modify", there is a text box containing the instruction: "Click on the field and make the necessary changes. Any changes made on this form will be permanently saved to the template." To the right of this text is a "Close" button. Below the text box is a dropdown menu labeled "Text For:" with "Closing" selected. An arrow points to the dropdown menu. The main content area contains two paragraphs of text: "Ask your healthcare provider what action steps are best for you to improve your ABC values and to help determine what your ABC goals should be." and "We look forward to working with you over the next few months to help you set and attain appropriate health goals for the ABC's of diabetes. The (insert clinic name) would like to thank you for the opportunity to provide health care for you and your family!"

**Modify Lost to Follow Up Template** – Allows the user to modify the letter draft. To modify the template, type the changes to the text and click on the “Close” button and the changes will be saved.



The screenshot shows a web interface titled "Lost To Follow Up Template" with a sub-header "Modify Lost To Follow Up Letter Template". Under the heading "To Modify", there is a text box containing the instruction: "Click on the field and make the necessary changes. Any changes made on this form will be permanently saved to the template." To the right of this text is a "Close" button. Below the text box is a dropdown menu labeled "Template Type:" which is currently empty. The main content area is a large, empty text box.

**Modify Vaccination Templates** – Allows the user to modify letter drafts for specific influenza & pneumococcal activities. To modify the template, choose the letter of interest. Edit text. Click on “Close” button, and changes will be saved.

**Note:** Be sure to enter your **clinic phone number** and **Date and Time** in the appropriate section of the letter if applicable.

**Vaccine Templates**  
**Modify Vaccination Letter Templates**

**To Modify**  
 Click on the field and make the necessary changes. Any changes made on this form will be permanently saved to the template. Close

Template Type 

- Influenza (had Pneumococcal)
- Influenza and Pnemococcal
- Influenza Only
- Pneumococcal (had Influenza)
- Pneumococcal Only
- Vaccine Clinic Day

**Update Clinic Name** – Allows the user to modify the name of the clinic. The name of the clinic is required before exiting the screen.

**Clinic Name**

Enter Name of Clinic

Save Close

**Update Quality Support Information** – Allows the user to modify and update Quality Improvement support information. By selecting Help >> Support from the menu bar, the user will know who to contact for help.

**Update Quality Support Information**

**To MODIFY a person's information**  
 Click on each field and make the necessary changes.

**To REMOVE a person from the list**  
 Clear the information by highlighting each field and by pressing the delete key

Last Name	First Name	MI	Degrees	Phone	E-Mail
<input type="text" value="DOE"/>	<input type="text" value="JOHN"/>	<input type="text" value="Z"/>	<input type="text" value="PCN"/>	<input type="text" value="(111) 222-3333"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Close

**Update Physician Info** – Allows for addition, correction, or deletion of physicians.

**Helpful Hint:** You can only delete a physician after the patients that were assigned to that physician are reassigned to another physician. To identify which patients are assigned to a particular physician, go to Reports, then *P*opulation Lists, then *P*atient choose the physician whose patient list you would like to run.

**Update Physician Information**

**Update Physician Information**

**To Add**  
Scroll to the very last empty row and enter the last name, first name, and middle initial.

**To Modify**  
Click on the field and make the necessary changes.

**To Delete**  
Click on the arrow (to the left of the last name) and press the delete button.

	Last Name	First Name	MI	Signature
▶	GREY	MEREDITH		Meredith Grey M.D.
	HOUSE	GREGORY		Gregory House MD
	HOWSER	DOOGIE		Doogie Howser MD
	ME	ASLDFKJLKJ		

Close

Record: 1 of 7

**Update Payor Info** – Allows correction of spelling mistakes and addition of payors to the list. However, the user will not be able to edit or delete the first seven items in the list.

**Update Payor Information**

**Update Payor Information**

**To Add**  
Scroll to the very last empty row and enter payor name.

**To Modify**  
Click on the name and make the necessary changes.

**To Delete**  
Click on the arrow (to the left of the payor name) and press the delete button.

**Payor**

▶	BLUECROSS AND BLUESHIELD
	MEDICARE
	MEDICAID

Close

Record: 1 of 8

**Update Diagnoses** – Allows correction of spelling mistakes and addition of clinical specific diagnoses to the list. The user will not be able to edit or delete the first four items in the list: Coronary Artery Disease, Renal Disease, Hypertension, or Neuropathy.

**Update Diagnoses**

**To Add**  
Scroll to the very last empty row and enter the diagnosis.

**To Modify**  
Click on the field and make the necessary changes.

**To Delete**  
Click on the arrow (to the left of the diagnosis) and press the delete button.

**Diagnosis**

▶	Coronary Artery Disease
	Renal Disease
	Hypertension
	NEUROPATHY

Close

Record: 1 of 12

**Update Users**– Allows the administrator to input, modify, and/or delete database users with their password and assign them to a user group for access to the database.

**NOTE: Only users assigned to the user group, “Admin”, have access to this menu option.**

**Update User Information**

**To Add**  
Scroll to the very last empty row and enter new user.

**To Modify**  
Click on the appropriate field and make the necessary changes.

**To Delete**  
Click on the arrow (to the left of the user name) and press the delete button.

User Name	Full Name	Password	User Group	Status
Doug	Doug	vman	View	Active
Jean	Jean	srcurler	Admin	Active
Nicole	Nicole	Chris	User	Active
▶				Active

Close

Record: 4 of 4