

**Mobile Resident Case Log  
Manual**

**GENERAL SURGERY**

**mRDCS**

**ACGME**

**June 2002**

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# Mobile Resident Case Log User Manual

## mRDCS

### **Introduction:**

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This application was developed to enable residents to enter Patient Encounters to ACGME through their handheld device. This application allows you to add and edit new cases, view and edit history procedures, fix conflicted procedures, and synchronize your data directly with ACGME.

### **Requirements:**

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#### Institution

- Program registration. There is a licensing fee of \$25 dollars times the total number of approved residents in the program listed on the Accreditation Data System.
- Port 8028 opened on firewall.

#### Computer

- Internet Access.
- Desktop PC running Windows 95/98/2000/NT.
- Scout Client 4.1 (Provided by ACGME on first Sync).

#### Palm

- Handheld device running Palm OS 3.5 or higher.
- 2 meg of free memory.
- User password to the Web application (must be greater than or equal to 5 characters).

## Starting the application:

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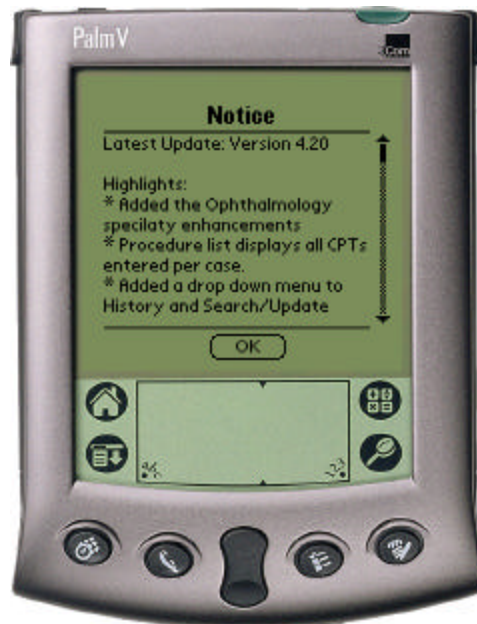
Tap on the **mRDCS** icon on the Palm Screen to start the application (Figure 1):

*mRDC Resident Case Log System (figure 1)*



**Figure 1**

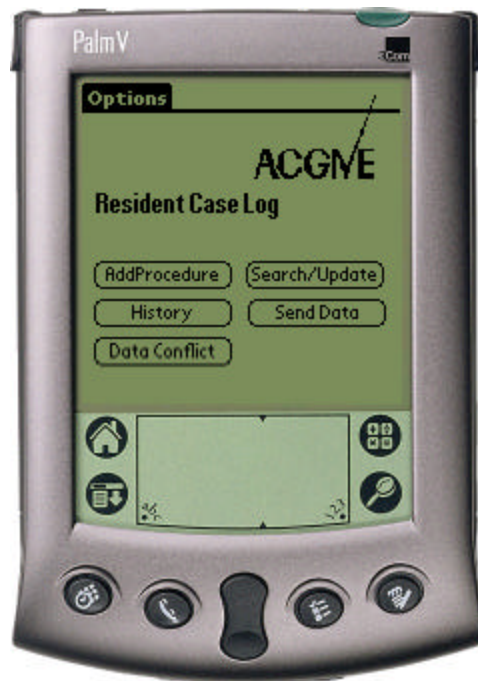
*Notification Screen (figure 2)*



**Figure 2**


A notice page will display the 1<sup>st</sup>. time you use the application (figure 2). This will notify you of the latest enhancements and corrections. Use the scroll bar on the right hand side to view text that disappears off the window.

Using the stylus, tap on the OK button to display the main application screen.



**Figure 3**

**Options Tab (see page 18):**

Pull down menu located on the Top left of the window. There are two options to access the menu: 1) Tap on the word Options located in the upper left corner of the window. 2) Tap on the Menu icon  located in the bottom left hand corner. Either process will display the following menu:

**About** - Version and Build date

**Notice** – Enhancements to Resident Case Log

**Preferences** – Allocate the number of history records to be displayed (up to 120) and Date Range of procedures.

**Copyright** – ACGME copyright information

Tap on the option you would like to view.

**Add Procedure:**

This button adds a new procedure.

**Search/Update:**

This button displays procedures that have been entered but not yet synched to ACGME. These procedures can be edited and any changes made affect data on the handheld only.

**History:**

This button displays procedures that have been entered, synched, and accepted by ACGME. The user can set the number of history records that can be viewed. The range is 1-120 days. These procedures can be edited, and any changes made to them affect data on the handheld and on ACGME's server.

**Send Data:**

This button synchronizes the User's data on the palm with ACGME. During this sync, procedures in Search/Update will be uploaded to ACGME and history procedures will be downloaded to the handheld device. Procedures that are in conflict will be downloaded to the handheld device. Periodically, reference tables, such as the CPT code tables; will be updated and downloaded to the handheld device.

**Data Conflict:**

This button allows the user to resolve conflicting procedures. Procedures are marked as Conflict Procedures by ACGME. These procedures can be edited. **This button only appears when there is a procedure in conflict.**

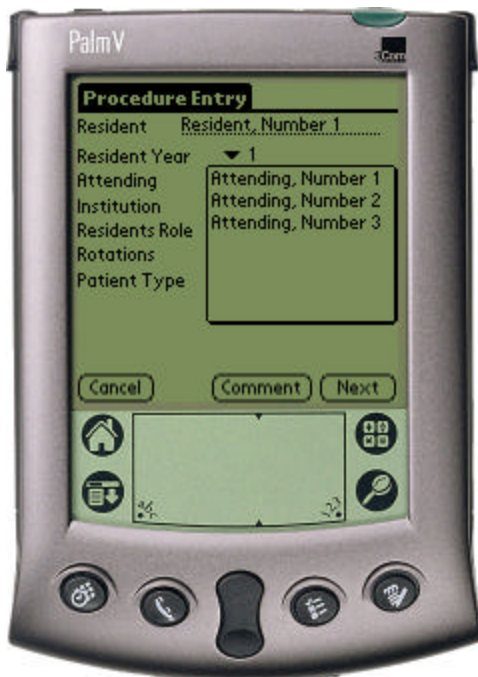
## **Adding a New Procedure:**

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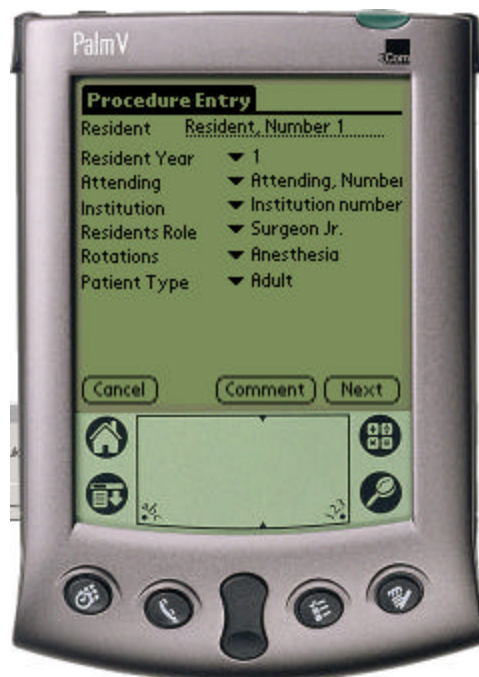
To add a new procedure, tap the **Add Procedure** button on the Main form (figure 3). At the procedure Entry screen (figure 4) tap on the **arrow** next to each field to display the list choices for that field. Select an entry in the listbox by tapping on it. The entry will be highlighted and will display next to the arrow as soon as the stylus is lifted off the screen. To change a selection, tap the arrow and make a new selection.

Each time you add a procedure all fields will have a default setting for Attending, Institution, Patient Type and Procedure date which will be the last values entered by the User. The Resident Year defaults to the Current Resident Year of the User indicated in the Residents information screen maintained by the program director or coordinator.

*Procedure Entry Screen (figure 4,5,6)*



**Figure 4**



**Figure 5**

**Cancel:**

Discards the Procedure input and returns to the Main screen.

**Comment:**

Opens a window to allow comments about the current case being entered. Maximum size of a comment is 1280 characters.

**Next:**

Display the next CPT Procedure entry screen.

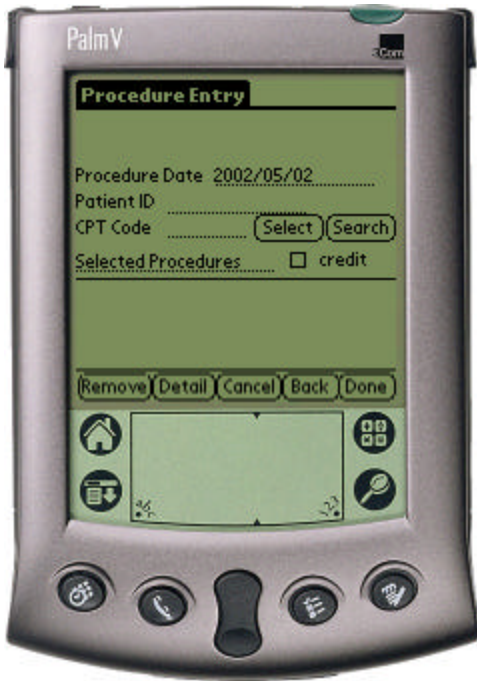


Figure 6

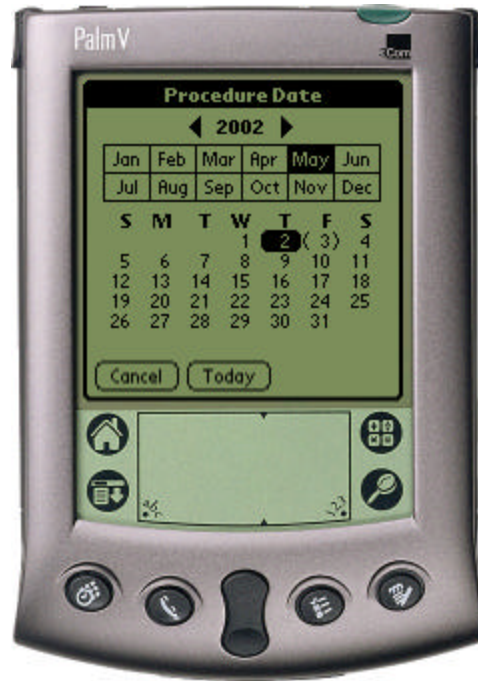


Figure 7

Procedure Date:

The procedure date will default to the last date you used when adding a procedure. To change the procedure date, tap anywhere on the date line next to "Procedure Date" (Figure 6); this will display a calendar (Figure 7). Tap the month, day and year you want to enter. To select the current date, tap the **Today** button. The date selected will be displayed next to the Procedure Date.

Patient ID:

Use graffiti (abc) and/or the numeric keyboard (123) to enter a patient id. This is a required field. It can be used to search for specific procedures or tracking patients. It is also used to avoid making duplicate entries for credit. The maximum number of characters for the case note is 26 characters.

CPT Code:

The number of characters for cpt codes are 5 digits.

**Select:**

Selects a manually entered CPT Code.

**Search:**

Allow you to search for a CPT Codes by Area and Type or By Description.

**Remove:**

Removes a CPT from the Selected Procedures listbox.

**Detail:**

Display the Defined Category, Area, Type, and CPT Code of a selected CPT Code.

**Cancel:**

Discards the Procedure input and returns to the Main screen.

**Back:**

Allows the User to view information entered in the first Procedure Entry screen without discarding input from the current screen.

**Done:**

Saves the new or edited Procedure. If there is an error, a message box will appear with instructions.

## Finding and Entering CPT Codes:

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There are two ways of entering CPT Codes; 1) manually or 2) Searching

### Entering a Familiar CPT Code:

To enter a known CPT Code, Tap the line next to “CPT Code” (depending on specialty, this label may be slightly different). A blinking cursor will appear on the line next to “CPT Code”.

Use graffiti (abc) and/or the numeric keyboard (123) to enter a CPT Code (Figure 8). Tap the **Select** button. If there are multiple area and types for the Code entered, a listbox displaying all areas and types of that code will appear (Figure 9).

The user can select the appropriate Area and Type by tapping the stylus on the text in the listbox. If the CPT code entered is valid it will display in the Selected Procedures listbox (Figure 10). If the CPT Code is not valid, an error message box will display (Figure 11).

If the highlighted CPT is to be marked for primary credit, tap on the credit check box. If not tap on the CPT in the selected procedures list to highlight the procedure you want as primary credit and tap on the check box. Only one CPT can be selected as credit per case.

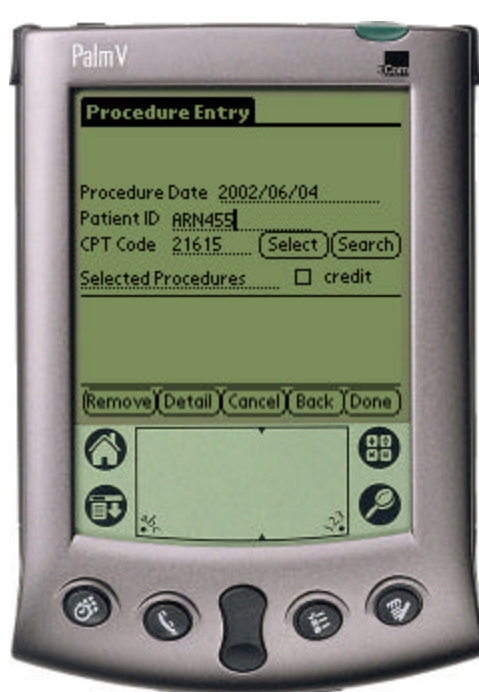


Figure 8

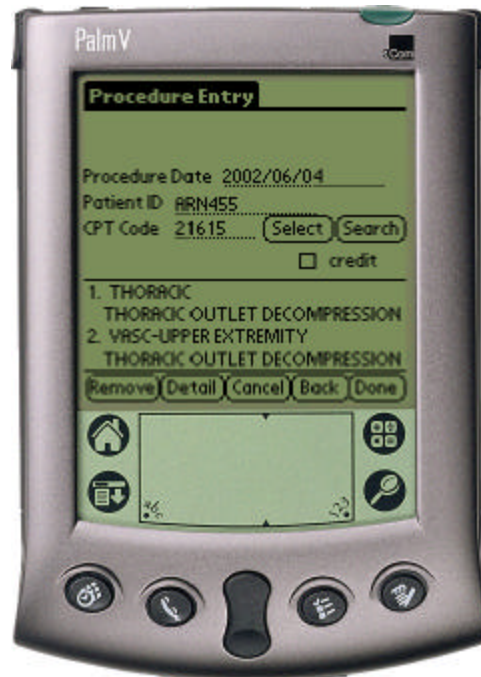
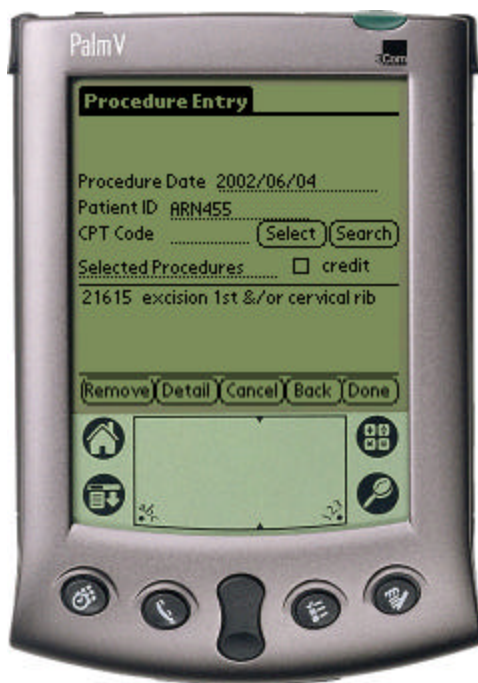
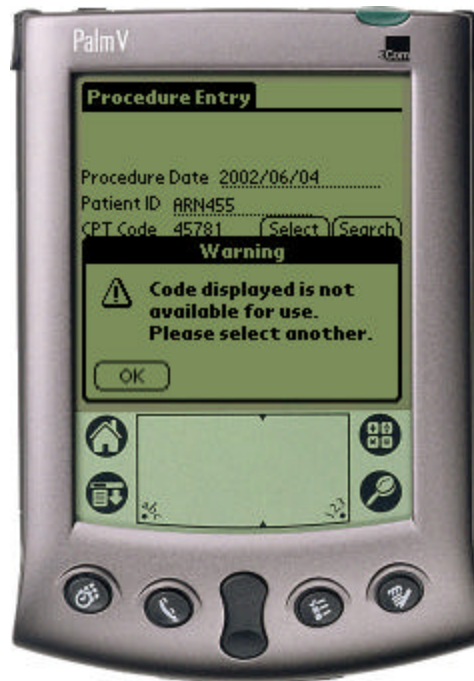


Figure 9



**Figure 10**



**Figure 11**

**Searching By Area/Type:**

To Search by Area and Type, tap the **Search** button (Figure 6). Tap the **Search By Area/Type** button (Figure 12). The user can search by Area, by Type, or by Area and Type (Figure 13). To Search by Area, Tap the **arrow** next to the Area label. A drop list of Areas available will appear. Select the desired Area by tapping the text in the drop list with the stylus. The selected Area will display next to the Area label (Figure 14).

To display a list of all the CPT codes within the select area tap Start Search. The CPT Codes within the selected Area will display in the Procedures list box (Figure 14). Tap on the procedure you wish to select and a window will appear at the top of the list displaying the Area and Type and complete description. Use the down button to scroll through the description. To close the window, tap on the x in the top right corner.

To Search by Type, tap the **arrow** next to the Type label. A drop list of Types will appear. Select the desired Type by tapping the text in the drop list with the stylus. To display a list of CPTs mapped to this type tap Start Search.

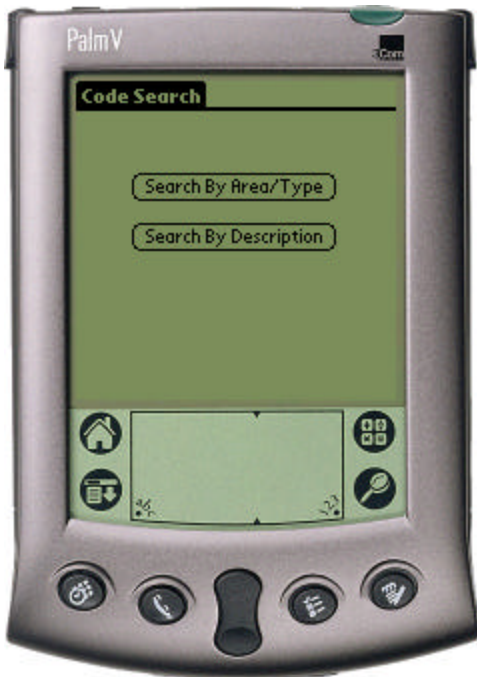


Figure 12

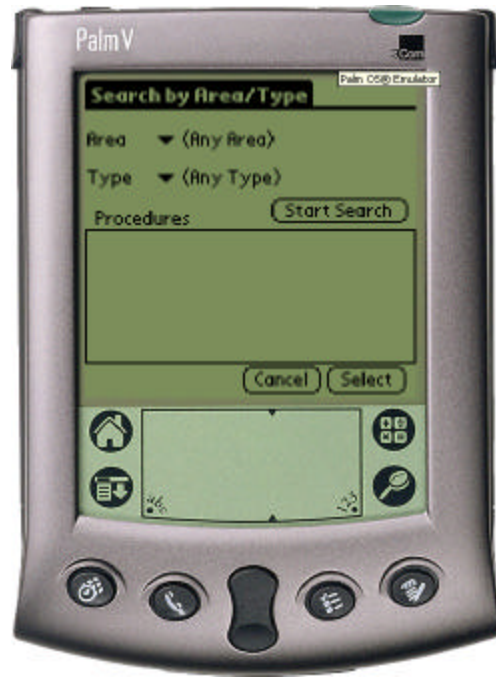


Figure 13

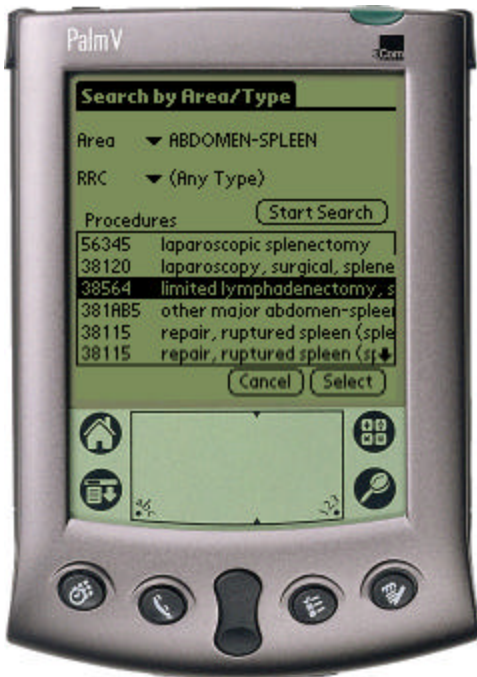


Figure 14

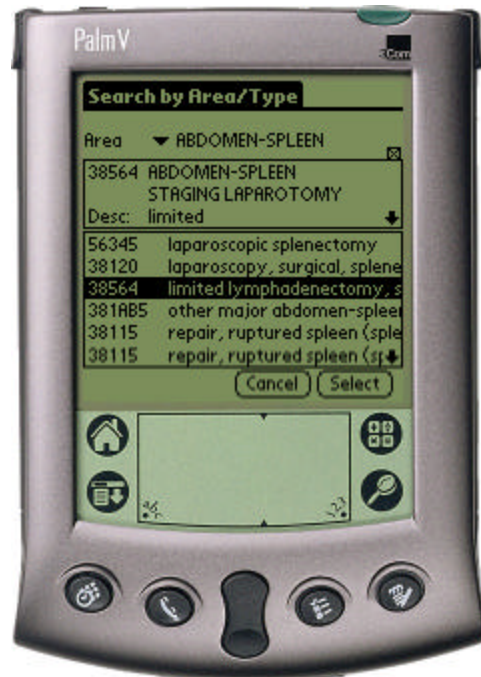


Figure 15

To select a procedure, highlight the desired procedure and Tap Select (Figure 14). Notice that a window opens at the top of the list when you tap on a procedure (Figure 15). The window displays the area, type, and complete description. Tapping on the small 'X' in the upper right corner will close it. Use the scroll bar to view the rest of the description. Once you tap select, the highlighted procedure will be transferred to the 'Selected Procedures' list box on the Procedure screen (Figure 10).

### Searching By Description:

To search by Description, Tap the **Search** button (Figure 6). Tap the **Search By Description** button (Figure 12). The search criteria window opens (Figure 16). Enter words or character strings you wish to search for separated by a space on the search string line. The search is a condition meaning that if you enter the values splenectomy as the search string the search would return all descriptions that contain the values (splenectomy) which in this case there are seven (Figure 17). To faster search a CPT code use the “Find whole words only” function. If you check off the “Find whole words only” check box the values enter will be strings contained in whole words. So a search for auto as a string would find the word autograph. However, the search for auto as a whole word would not display the word autograph since the whole word autograph dose not match the whole word auto.

Press the search button to search for specified string or word. A list of CPTs will display. Tap on any line to few Area, Type, and Complete description of the highlighted procedure (Figure 17). Locate the procedure you desire by tapping on the line then tap on the select button.

Tap on Search to change the search criteria and start the search again.

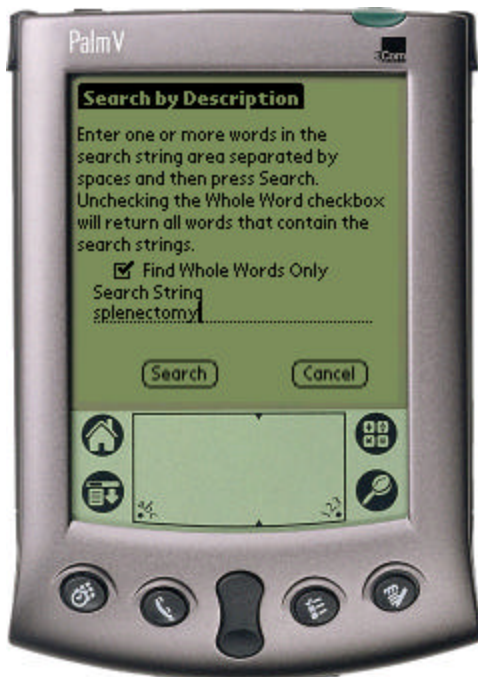


Figure 16

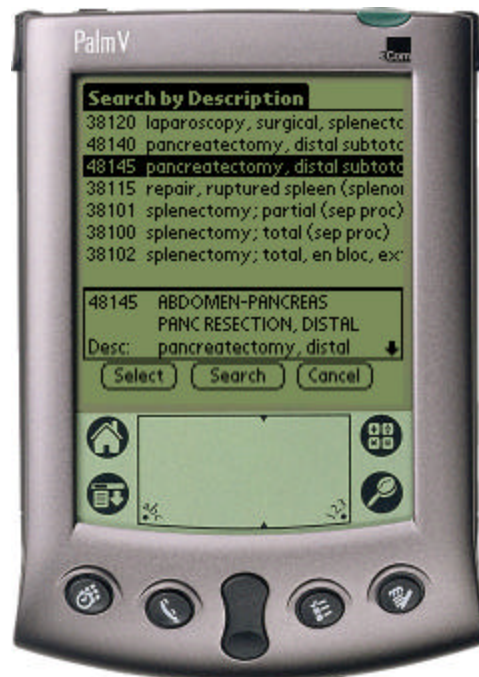
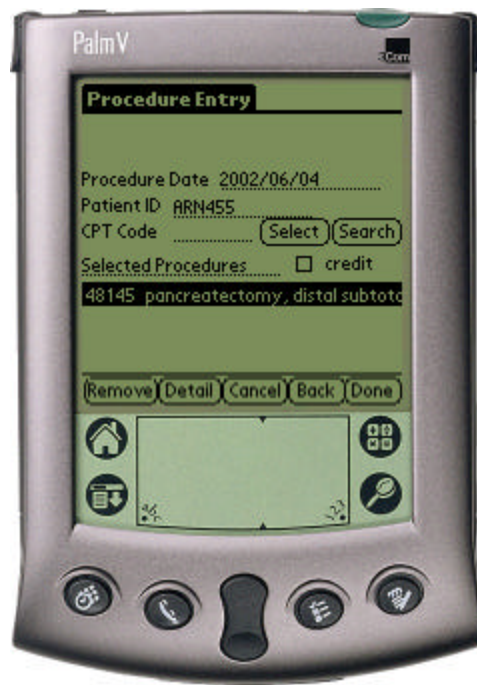


Figure 17



**Figure 18**

**Remove:**

Removes a CPT from the Selected Procedures listbox.

**Detail:**

Display the Defined Category, Area, Type, and CPT Code of a selected CPT Code.

**Cancel:**

Discards the Procedure input and returns to the Main screen.


**Back:**

Allows the User to view information entered in the first Procedure Entry screen without discarding input from the current screen.

**Done:**

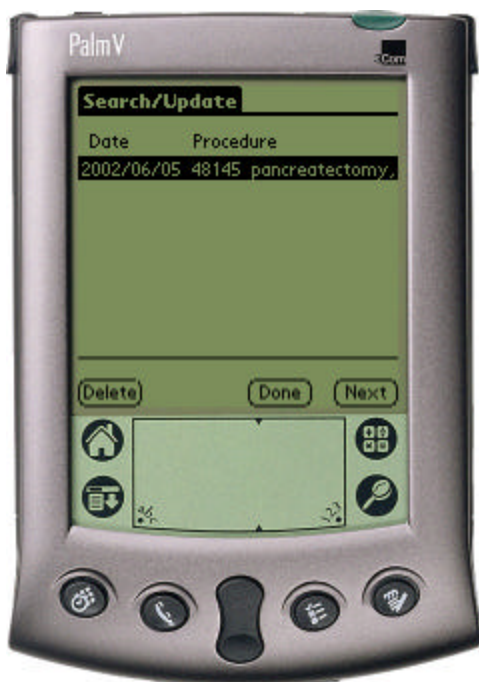
Saves the new or edited Procedure. If there is an error, a message box will appear with instructions.

## **Editing a Procedure:**

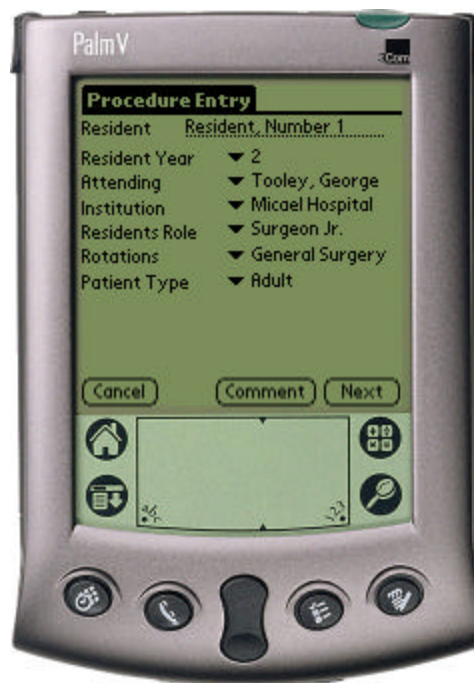
All procedures, new, history, and conflict procedures; can be edited on the Palm. The Search/Update and History lists have a pull down menu to allow you to sort and filter each list. To view the pull down menu tap on the Menu Icon  located in the lower left corner or tap on the window title in the upper left corner. The sort options are used to display the procedures in ascending or descending date order. Once you select a sort order it will continue as the default order in both screens. Full discussion of the filter will be covered in the **Searching for a Specific Procedure** (page 16) section.

## **New Procedure**

To edit tap the **Search/Update** button on the Main Screen (figure 3). The displayed list shows procedures that have been entered by the user but not yet sent to ACGME (figure 19). Select a procedure to edit by tapping the desired procedure with the stylus. The selected procedure will be highlighted. Tap the **Next** button to load the procedure into the Procedure entry screens (Figure 20). The edited procedure will be saved when you tap the **Done** button on the second Procedure Entry screen after making changes.



**Figure 19**



**Figure 20**

## **History Procedure**

To edit procedure (one that has been sent to and accepted by ACGME), tap the **History** button on the Main Screen (Figure 3). The displayed list shows procedures that have been accepted by ACGME (Figure 21). Editing these procedures will result in a change to procedures previously submitted to the ACGME database. Select a procedure to edit by tapping the desired procedure with the stylus. The selected procedure will be highlighted. Tap the **Next** button to load the procedure into the Procedure entry screens (Figure 22). The edited procedure will be saved when you tap the **Done** button on the second Procedure Entry screen after making changes.

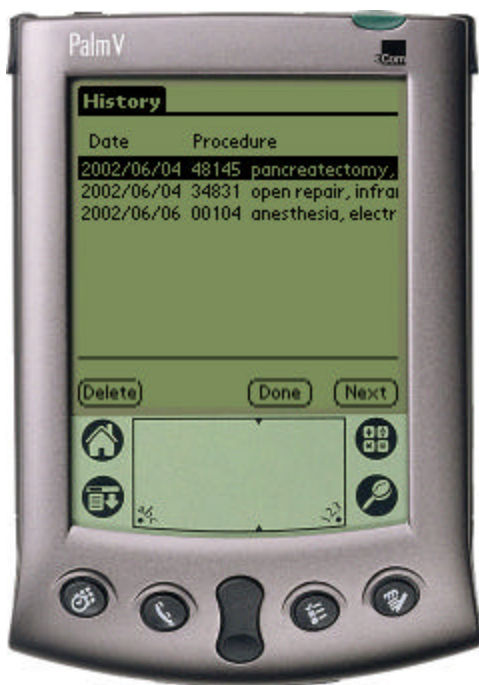


Figure 21

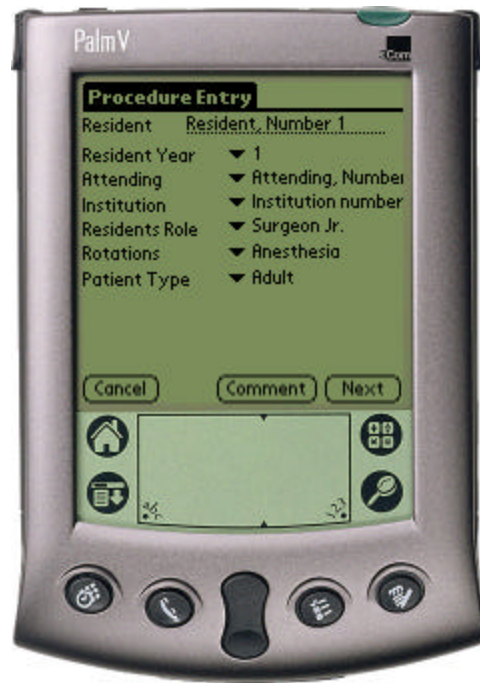


Figure 22

### Search/Update and History Functions:

#### Delete:

This button deletes an entire Procedure. Once deletion is confirmed, the procedure is completely removed from the handheld device. If the Procedure is a History Procedure, deleting it will also remove it from ACGME's database.

#### Done:

This button takes you back to the Main Screen

#### Comment:

This button loads the comments entered for the selected procedure. This allows you to enter in comments if none have been entered or edit existing comments. Use graffiti (abc) and/or the numeric keyboard (123) to enter a comment/op note.

#### Next:

This button loads the selected Procedure into the Procedure Entry Screens where it can be viewed and/or modified.

## Searching for a Specific Procedure:

To search for a specific procedure; activate the pull down menu when the “Search/Update” or “History” procedure lists is displayed (Figure 23). Tap the Menu icon or tap on the window title to activate the pull down menu. The menu lists two sort functions and a filter function for use in locating procedures (Figure 24).

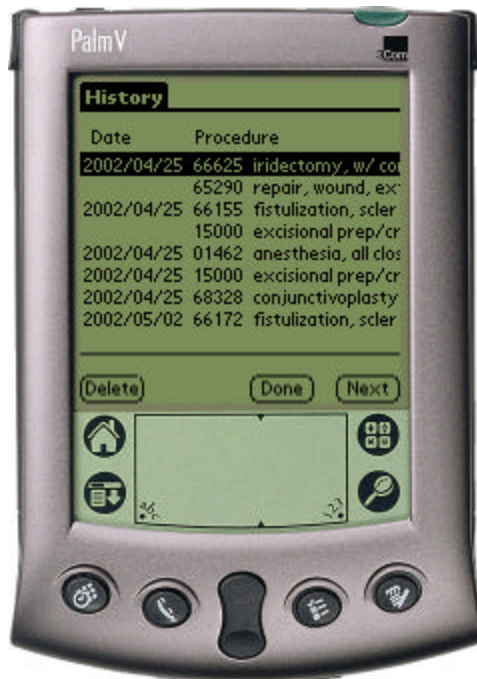


Figure 23

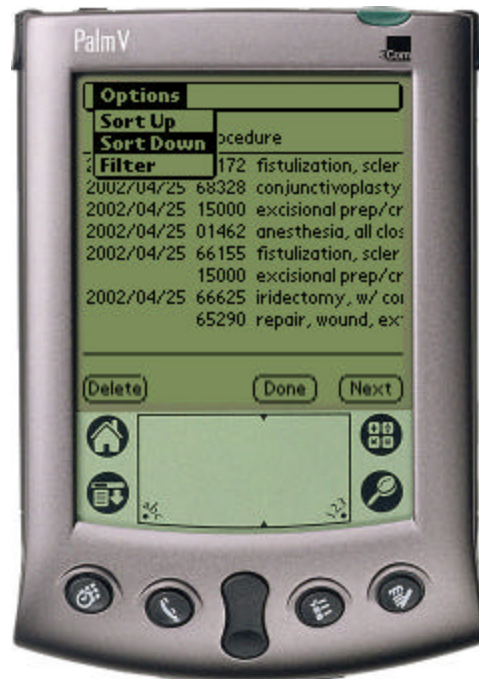


Figure 24

### Using the Filter to find cases:

Locate the pull down menu while in the History or Search/Update functions. Select the Filter option. A new window will display listing selection boxes for the data entered in the procedure fields (Figure 25).



Figure 25

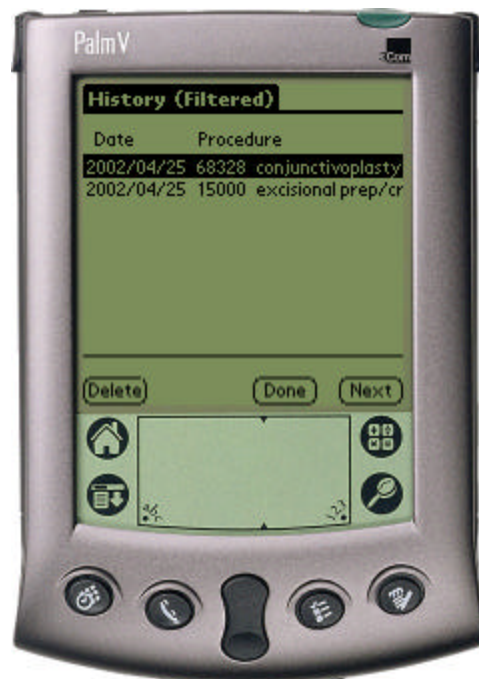


Figure 26

In the above filter example we are looking for all procedures listed in figure 25 that have values matching the filter. Tap Ok in the filter screen and the procedure list will display (Figure 26). Notice the title of the page has changed and contains the (Filtered) tag to indicate that not all the procedures are listed.

The filter will last as long as the procedure list is displayed. If you go to the main window the filter will be cleared and the next time you view the Search/Update or History functions the list will be unfiltered.

**Cancel:**

Return to previous screen without filtering.

**Clear:**

Clear all selections. Refresh screen to empty selections.

**OK:**

Return to previous screen and apply the filter to the procedure list.

## Setting User Preferences for History:

To set user preferences; Tap the Options pull down menu as displayed in Figure 27, then choose Preferences. The user can select a specific number of days for which procedure history will be displayed (1 –120). The history records are selected from the web site based on the (current date – the number of days) formula. This data will occupy memory space on your handheld. To minimize the space used, set this number low. If you have plenty of space set it a little higher (Figure 28). There is fixed value by date range also.

The checkbox for Include all CPT Codes is used for memory space issues also. To reduce the amount of memory used by the CPT code description turn off the “Include All CPT Codes” check box. With the check box off the handheld will contain only the CPT Codes within the user’s specialty. All miscellaneous CPTs or unassigned CPTs (cpt codes used by other specialties) will be unavailable for entry.



Figure 27

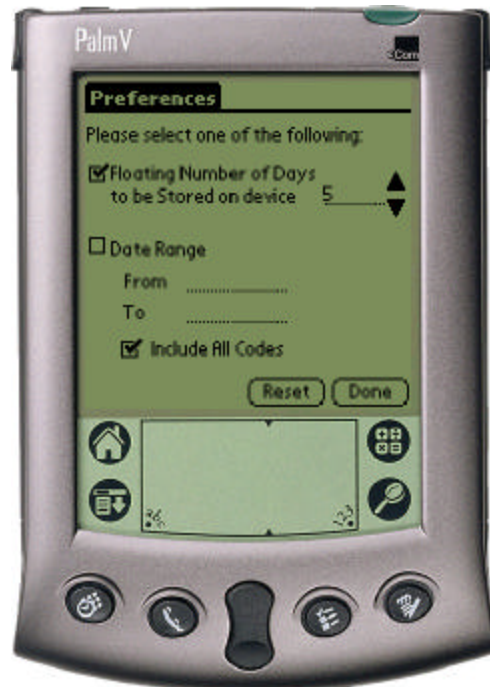


Figure 28

### Selecting Float Days:

To select a number of floating days, check the Floating Number of Days checkbox by tapping on the checkbox. This is the default setting with 5 days. Set the number of days by pressing the up/down arrows to the desired number or by tapping the line next to the floating number of days field and entering numbers by using the numeric keyboard (123).

### Selecting a Date Range:

To select a date range, check the Date Range checkbox by tapping it with the stylus. Tap on the line next to the *From* label to display the calendar. Select the desired date. Tap on the line next to the *To* label to display the calendar. Select the desired date.

### Include All Codes:

To Include All CPT Codes, check the Include All Codes checkbox. To receive only those codes within the User’s specialty, uncheck the Include All Codes checkbox by tapping on the Include All Codes checkbox.

Tap **Done** to save the preferences or tap **Reset** to set them back to the defaults.

## Sending Data

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To send Data to ACGME, Tap the **Send Data** (Figure 3) button on the Main form. The user will be prompted to specify how they are syncing, by the cradle or through a modem (Figure 29). This exchanges data with ACGME. Initially, this synchronization may take up to 10 minutes. After the first sync, the synchronization time will be approximately 3-4 minutes depending on the amount of data being transferred.

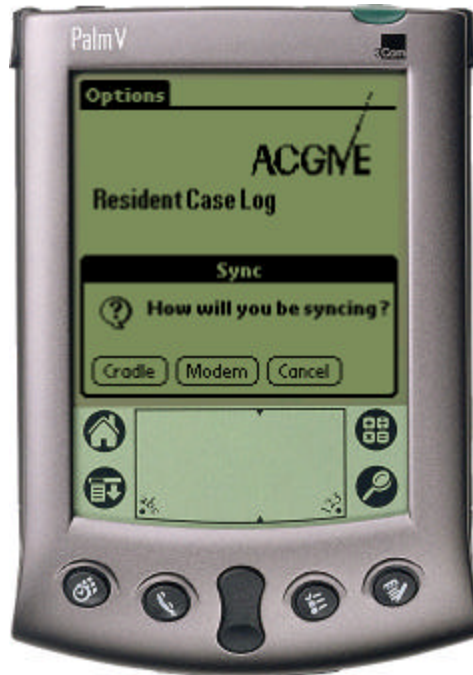


Figure 29

## Correcting Procedure Conflicts:

Procedure conflicts arise when data on the handheld does not match that on the Web site. Typically this happens when the Program director or resident coordinator removes an attending or institution from the lists since you last synchronized.

When data conflicts happen a button will display on the welcome menu. To correct conflicts tap on the Data Conflict button.

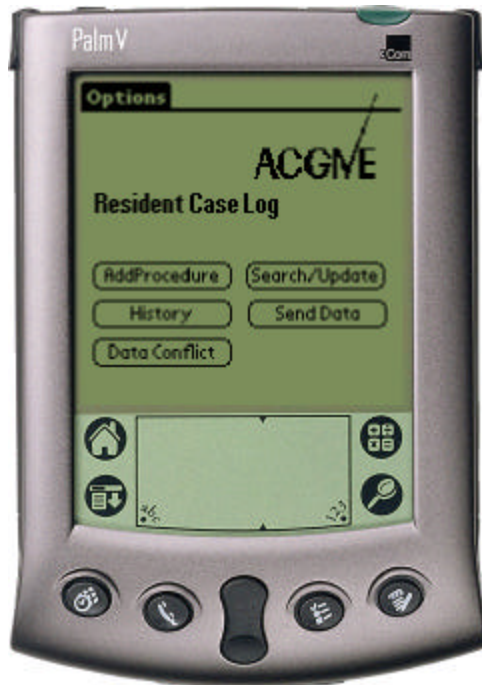


Figure 30

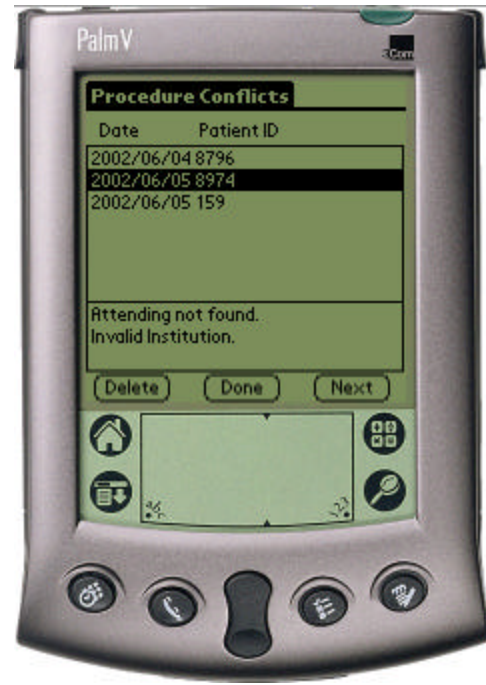
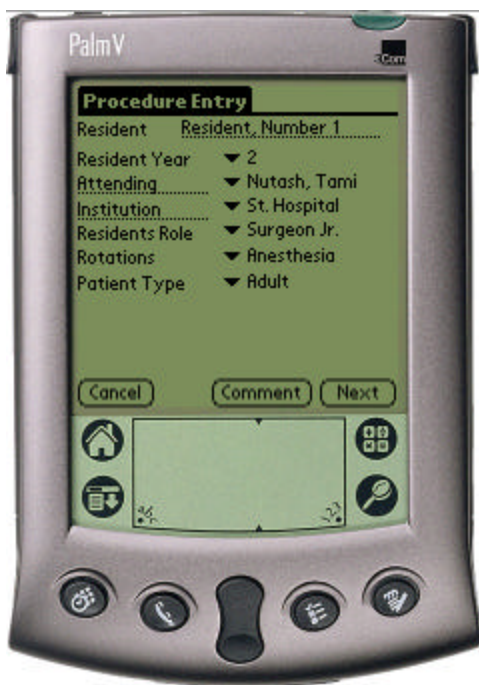


Figure 31

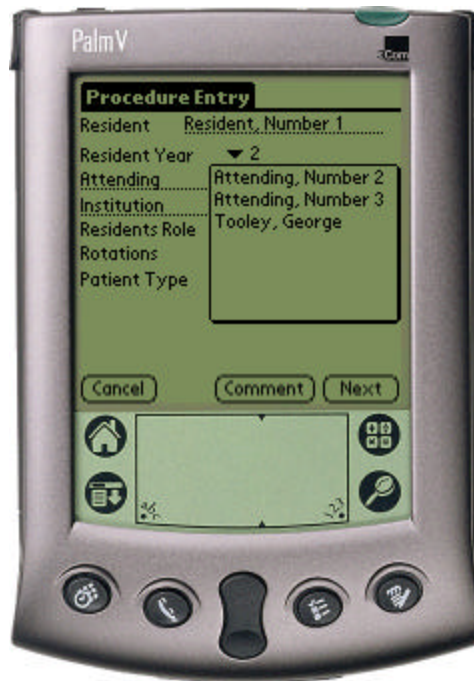
To find the problem with the procedure, tap on each of the dates and a box will display with the problem (Figure 31).

In this example the attending and institution are not found.

To correct a procedure, tap on the procedure then tap on next button.



**Figure 32**



**Figure 33**

Tap on the attending name and a drop down list of attending names will display. Notice that the one displayed at first is not in the list. This is why the procedure has a conflict. Select a new attending. You would do the same for the institution

Typically this happens when the program director or coordinator has found two values with slightly different spellings. He or she consolidates them into one value. There is no problem on the web because all the procedures are changed. However, the handheld has independent lists that get updated at synchronization time only. Data conflict is the only way to present you with the information so that you can make an informed decision.

The system will also detect if another resident has taken credit for the same day, same patient and will display in the conflict section.

**Delete:**

This button allows the User to delete the selected conflict. If the Conflict was a new procedure, there will be no record of the procedure after it is deleted. If the Conflict is with a history procedure then deleting the conflict will restore what was on the web site.

**Next**

This button allows you to change the conflicting information. In the example above the conflicts are an invalid attending and institution. This conflict arose because the values existed on the handheld but were removed from the web site before synchronization (Figure 32). You will notice that the Attending and Institution fields are underlined. The underlining indicates the conflicts. Change the attending and the institution to one for the drop down list and the procedure will be moved from the data Conflict list to the proper procedure list: History or Search/Update.

**Done:**

This button returns to the Main screen.