



## Release Notes for Goulburn Valley Health iPM integration

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# 1. iPM Integration

## 1.1 Summary of Changes

To work around the capabilities of iPM, EpiSoft has rewritten its interface for GVH. The most significant change has been to the way appointments are integrated. Prior to the final move of GVH to iPM on 20 Nov, this EpiSoft Release of 1st October 2024 supports the interim period when **Vital is still to be used for appointments up to 20 November** and **iPM needs to be used to book outpatient (non-protocol) appointments after that date.**

Protocol appointments (both inpatient and outpatient) will continue to be created and changed in EpiSoft up to **and after** 20 November.

### 1.1.1 Your work processes that will stay the same:

- All **protocol** appointments need to be booked, changed (moved / cancelled etc) in EpiSoft regardless of whether before or after 20 Nov.
- Patient demographics will continue to be imported from iPM as per VITAL
- UR numbers in VITAL will not change to the iPM UR until 20 Nov
- You will continue to admit and discharge inpatient visits in iPM (after 20 Nov) as you do in Vital

### 1.1.2 Your work processes that will need to change

- Any other (non protocols) appointments on or after 20 Nov, need to be booked in iPM. These will display in EpiSoft so there is no need to re-enter them in EpiSoft.
- For inpatient protocol appointments, you are already used to making a booking in VITAL just prior to the date of admission. This is so EpiSoft can acquire the Episode ID and the Encounter Summary will be sent after discharge.
- For outpatient protocol appointments after 20 Nov, you have to make this duplicate booking in iPM as well as we have to match the outpatient protocol appointments coming from iPM.
- If you wish to edit a non protocol appointment with a date prior to 20 Nov, you can do so in EpiSoft.
- If you wish to edit an appointment on or after 20 Nov, you need to do this in iPM.
- You can continue to set the status of appointments prior to 20 Nov in EpiSoft including setting complete on the outpatient appointment.

- After 20 Nov, this will change and you will be able to non-protocol outpatient patient appointments can be arrived and attended in either EpiSoft or iPM BUT you must set the outpatient appointment to status of complete / discharged in iPM (this status may be called depart or discharge in iPM).
- Allergies and alerts will no longer be imported – this can be reinstated at a later time should the Oncology Department clinicians require this. iPM has a different patient allergies and alerts list which will need to be reviewed
- The referring Dr csv file will be disabled until a specification of how this function can be supported in iPM is received

Further detail and supporting screenshots are below.

## 1.2 Managing Protocol appointments

These will be booked and maintained in EpiSoft as per now (both inpatient and outpatient).

To see at a glance if an appointment is a protocol appointment (or not), you can see this on the worklist:

## Appointment List

Today
  Yesterday
  Tomorrow
  Next 7 Days
  Last 7 Days
  Any Date
  Date Range

MRN/UR#: 
 EpiSoft ID: 
 Surname: 
 Given Name: 
 Date of Birth:

Appointment Status: 
 Country: 
 Site: 
 Appointment Type: 
 Appointment Clinician:

Primary Clinician: 
 Visit Type:

protocol appts have short name of protocol in brackets after the reason

Appointments List Filter: Next 7 Days at Goulburn Valley Hospital - Interface Testing, Haematology Outpatient Clinic, Hospital in the Home, Kyabrim - Outpatient Clinic, Seymour Health Cancer Service - Seymour Health Cancer Service - D Clinic, Shepparton - Chemotherapy Day Unit, Shepparton - Outpatient Clinic Shepparton - SURC Clinic, All Appointments, All Status Visit Types All Visit Types

View cancelled appointments
  Hide Completed/Discharged

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Epi ID	Name	DOB	MRN/UR#	Phone	Date	Time	Attended	Reason	Type	Appt Clinician	Resource/Site
<input type="checkbox"/>	<input type="checkbox"/>	13420	FORBES, Spencer	12/03/2024	0002407	0400271377	Fri, 27/09/2024	9:00 AM - 9:40 AM	<input type="checkbox"/>	Anaemia (OPMATCH C1 D1)	Admission (blood transfusion)	O'Ncolo, Nathan	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	13428	DON, She	10/05/1983	0002341	12345	Fri, 27/09/2024	10:30 AM - 10:45 AM	<input type="checkbox"/>	Specialist Clinics Appt	Outpatients Schedules	UNKNOWN, Clinician	Shepparton - Outpatient Clinic
<input type="checkbox"/>	<input type="checkbox"/>	13406	SMART, Max	22/10/1930	0000622	0431367791	Sat, 28/09/2024	9:00 AM - 5:00 PM	<input type="checkbox"/>	Lymphoma	Outpatients Schedules	Session, Clinician	Chair 2
<input type="checkbox"/>	<input type="checkbox"/>	13406	SMART, Max	22/10/1930	0000622	0431367791	Sat, 28/09/2024	9:00 AM - 5:00 PM	<input type="checkbox"/>	Lymphoma	Outpatients Schedules	Session, Clinician	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	13424	ELANDOHTHEGREATISTOFALL, Arianagrandiscool	18/10/1993	0000788	0123457884	Fri, 4/10/2024	8:30 AM - 5:00 PM	<input type="checkbox"/>	Specialist Clinics Appt	Outpatients Schedules	Session, Clinician	Shepparton - Outpatient Clinic

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Or if you click on the appointment time on the list (or right click from calendar) to open the Edit Appointment screen, the words **Protocol Appointment** appear in bold under the comments box.

## Edit Appointment

Patient: FORBES, Spencer DOB 12/03/2024 (6 months) UR# 0002407 ID 13420 (M)

Referral: Referral Not selected

Clinician: O'Ncolo, Nathan (EpiSoft Admin - GVHTEST)

Location: Shepparton - Chemotherapy Day Unit

Resource: Chair 1

Visit Reason: Anaemia

Visit Type: Admission (blood transfusion)

Service setting:  Outpatient  Inpatient

Estimated cost of service: [Empty field]

Date: Fri 27/09/2024

Start Time: 9:00 AM

End Time: 9:40 AM

PAS Episode ID: 1000

Comment: [Empty text area]

Protocol Appointment

Appointment Confirmed

Send SMS reminder

Send email reminder

Patient does not have a mobile phone number or consent, SMS reminders will not be available.  
Patient does not have an email address or consent, email reminders will not be available.  
Select 'Edit patient' from the record summary menu to add the required contact details for reminders.

[View Apt Audit](#)

[Save](#) [Save & Close](#) [Close](#)

There will be no change needed to how you manage outpatient protocol appointments until just prior to 20 Nov when you need to check for outpatient appointments on your upcoming appointment list and book them in iPM just as you currently do for inpatient appointments.

This is so EpiSoft can obtain the Episode ID (which EpiSoft previously set but which now must come from iPM).

Once you have created a matched booking for a protocol appointment in iPM (which you won't need to do for several weeks ie till just prior to 20 Nov to match the appointments starting on 20<sup>th</sup> Nov), if the protocol appointment needs be changed, first always change it in EpiSoft and then in iPM.

Why aren't we synching protocol appointment changes from the PAS?

In the interests of clinical safety because protocol appointments are generally part of a complex date series affecting patients' treatment efficacy, EpiSoft will need to remain the source of truth for protocol appointments (as it is with inpatient appointments).

If you want to check if the iPM Episode ID is being set, you can see this on the same Edit Appointment screen

### **1.3 Other (non-protocol) appointments**

Doctor consultations, nurse education and various other non-protocol appointments you will need to book in two different systems for the next few weeks and after 20 Nov, all of these will be booked and maintained in iPM.

If you wish to check which system the appointment was created in, you can open Edit Appointment and view the PAS Episode ID.

If the number is a very long digit beginning with 45nnnnn, it was created by EpiSoft to link to Vital. Otherwise it was created by iPM.

If you have any issues with appointment integration, we will ask for the patient MRN and the PAS Episode ID (if there is one) so please make sure any issues raised in Help Desk related to appointment integration include these details.

## Edit Appointment

FORBES, Spencer DOB 12/03/2024 (6 months) UR# 0002407 ID 13420 (M)

Referral Not selected

O'Ncolo, Nathan (EpiSoft Admin - GVHTEST)

Shepparton - Chemotherapy Day Unit

Chair 1

Anaemia

Admission (blood transfusion)

Outpatient  Inpatient

Estimated cost of service

Date: Fri 27/09/2024

Start Time: 9:00 AM End Time: 9:40 AM

PAS Episode ID: 1000

Protocol Appointment

Appointment Confirmed  
 Send SMS reminder  
 Send email reminder

Patient does not have a mobile phone number or consent, SMS reminders will not be available.  
Patient does not have an email address or consent, email reminders will not be available.  
Select 'Edit patient' from the record summary menu to add the required contact details for reminders.

[View Apt Audit](#)



## 1.4 Quick guide to where to book non-protocol appointments

- Book in EpiSoft if the date is prior to 20 Nov
- Book in iPM if the date is after 20 Nov
- If the date is prior to 20 Nov and is rescheduled to after 20 Nov, **cancel in EpiSoft and rebook in iPM**
- After 20 Nov, we will introduce a role privilege where you will **not be allowed** to book non-protocol appointments in EpiSoft at all. This will eliminate

errors in working out where to book but we can't switch this role on until after this interim period.

- When booking in iPM, if you wish the appointment to appear in the resource calendar rather than the clinician calendar, you can send an independent resource – Chair codes have been setup on the assumption that the resource codes will be CHAIR01 and CHAIR02 and so on for Shepparton and CHAIRKY01 for Kyabrim and so on.

### **1.5 Non-protocol appt changes (visit reason and type)**

- iPM is not able to send EpiSoft matched visit reasons or matched visit types
- Hence the visit reason and type of appointments created in iPM will display as text on the lists and Record Summary but will display as Not Coded in the dropdown lists.
- To reduce the number of Not Coded Visit Reasons, if the patient has had a previous visit, we will set the visit reason from their previous visit as this does not change too much. However a visit type could be anything so without valid visit type codes from iPM, these will remain as Not Coded.
- Matching visit types between iPM and EpiSoft could be reviewed at a later time by iPM administrators as EpiSoft can match a visit type code if it is sent and if that code is set up to match a visit type in EpiSoft. GVH staff will need to confer with their local iPM users if you want to introduce this as the EpiSoft appointment import function supports this matching if we can be sent recognisable codes for visit type.

See screenshots below.

## Appointment List

Today
  Yesterday
  Tomorrow
  Next 7 Days
  Last 7 Days
  Any Date
  Date Range

MRN/UR#:  EpiSoft ID:  Surname:  Given Name:  Date of Birth:

Appointment Status:  Country:  Site:  Appointment Type:  Appointment Clinician:

Primary Clinician:  Visit Type:

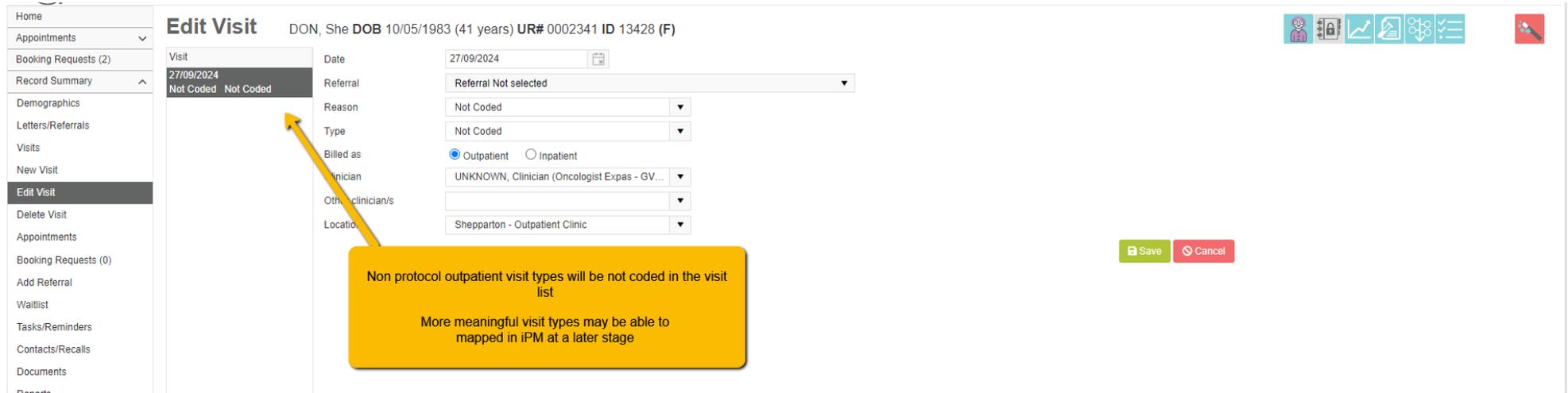
Appointments List Filter: Next 7 Days at Goulburn Valley Hospital - Interface Testing, Haematology Outpatient Clinic, Hospital in the Home, Kyabrim - Outpatient Clinic, Seymour Health Cancer Service, Seymour Health Cancer Service - Dr Clinic, Shepparton - Chemotherapy Day Unit, Shepparton - Outpatient Clinic, Shepparton - SURC Clinic, All Appointments, All Status Visit Types All Visit Types

View cancelled appointments
  Hide Completed/Discharged

<input type="checkbox"/>		Epi ID	Name	DOB	MRN/UR#	Phone	Date	Time	Attended	Reason	Type	Appt Clinician	Resource/Site
<input type="checkbox"/>	<span style="color: green;">O</span> <span style="color: red;">B</span> <span style="color: yellow;">!</span> <span style="color: green;">!</span>	13420	FORBES, Spencer	12/03/2024	0002407	0400271377	Fri, 27/09/2024	9:00 AM - 9:40 AM	<input type="checkbox"/>	Anaemia (OPMATCH C1 D1)	Admission (blood transfusion)	O'Ncolo, Nathan	Chair 1
<input type="checkbox"/>	<span style="color: green;">O</span> <span style="color: red;">B</span> <span style="color: yellow;">!</span> <span style="color: green;">!</span>	13428	DON, She	10/05/1983	0002341	12345	Fri, 27/09/2024	10:30 AM - 10:45 AM	<input type="checkbox"/>	Specialist Clinics Appt	Outpatients Schedules	UNKNOWN, Clinician	Shepparton - Outpatient Clinic
<input type="checkbox"/>	<span style="color: green;">O</span> <span style="color: red;">B</span> <span style="color: yellow;">!</span> <span style="color: green;">!</span>	13406	SMART, Max	22/10/1930	0000622	0431367791	Sat, 28/09/2024	9:00 AM - 5:00 PM	<input type="checkbox"/>	Lymphoma	Outpatients Schedules	Session, Clinician	Chair 2
<input type="checkbox"/>	<span style="color: green;">O</span> <span style="color: red;">B</span> <span style="color: yellow;">!</span> <span style="color: green;">!</span>	13406	SMART, Max	22/10/1930	0000622	0431367791	Sat, 28/09/2024	9:00 AM - 5:00 PM	<input type="checkbox"/>	Lymphoma	Outpatients Schedules	Session, Clinician	Chair 1
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iPM not sending EpiSoft matching visit types so we are showing text from iPM appointment  
 Visit reason will set from patient's previous visit reason if there is one otherwise there will also be text



## 1.6 Non-protocol appt changes (appointment clinician)

- Since iPM is the source of truth for a new non protocol appointment after 20 Nov, it is important your clinicians that are being booked in iPM are set up correctly.
- EpiSoft will be setting up a Clinician UNKNOWN to ensure appointments still land if you have not set the clinician up properly.
- If this happens your system administrator can fix the clinician’s profile in EpiDirectory and update the appointment in iPM to fix the clinician.

See screenshot below

The screenshot shows the 'Edit User' interface in EpiSoft. At the top left is the EpiSoft logo, and at the top right is the user name 'Nathan O'Ncol'. Below the logo is a navigation bar with 'User' and 'Security' tabs, and a session information string '(Session, Clinician, , joneill+cli1@episoft.com.au)'. In the top right corner, there are 'Save' and 'Close' buttons. The main form is titled 'Edit User' and is divided into several sections:

- User Information:** Title (Dr), First Name (Clinician), Last Name (Session), Email (joneill+cli1@episoft.com.au), Alert Email (empty).
- Account Settings:** Has Account (checkbox), Active (checkbox checked), Can Prescribe (checkbox checked), Requires referral for billing (checkbox), Is Doctor (checkbox checked), Can administer drugs (checkbox).
- Created/Modified:** O'Ncolo, Nathan on 6/09/2024.
- Other Health Provider Details:**
  - Prescriber No., Prescriber Type, Primary Provider No., AHPRA Code, Outlet Code.
  - HPI-I: Date Last Checked (N/A), HPI-I Status (SESCLI).
  - Registration Number (NZ), Other external identifier (SESCLI).
  - Qualifications, Years of experience (specialist only), Date of graduation (specialist only).
  - ANZSCO Occupation.
  - ATSI status, ATSI cultural training (Yes/No/Not req. radio buttons).
  - Year of birth, Gender (M/F/Other radio buttons).
  - Phone, Mobile, Fax.
- Address:** Country (Australia), Practice Name, Unit No, Street No, Street, Street Type, State/Province, Suburb/Town, Postal/Zip code.
- Affiliated Hospitals:** Only needed for certain forms linking doctors and hospitals. Assign Hospital, Provider No, + Add button.

## 1.7 Some current functions disabled

- EpiSoft is unable to import the list of referrers and their Referral Net capabilities to assist with specialist letter writing until we can receive a specification

of how this function can be supported from iPM (hopefully this will temporary)

- EpiSoft is unable to import allergies until such time as there is a specification for which allergies and alerts are needed and what codes will be used to distinguish these in the messages from iPM (this is pending Day Oncology clinicians providing details of which of the iPM list of allergies/alerts are important)
- EpiSoft is unable to support matching to more clinically meaningful visit types until such time as the visit types can be applied by code or by text in iPM
- EpiSoft is unable to support creating all appointments in EpiSoft owing to this not being a proven feature of iPM to receive appointments from another system (this capability exists in the iPM version in use but is not proven anywhere as yet)
- EpiSoft is unable to support matching to visit reasons except by the patient's previous reason – this is not likely to be supported from iPM owing to these being essential in iPM for accurate VINAH reporting