

Oracle® Healthcare Master Person Index

United States Patient Solution User's Guide

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Preface

The United States Patient Solution was created to help you solve a business problem by providing you with a template that is configurable to your specific healthcare requirements. It enables you to set up a skeleton of your patient application without having to create everything from scratch, allowing you to avoid trial and error. But this does not mean your application is immediately a fully-functioning project for you will need to configure it as well as set various parameters that are specific to your healthcare needs, such as standardization and matching. This guide points to OHMPI documents that provide the information you need to complete these tasks.

Audience

This document is intended for users of the Oracle Healthcare Master Person Index (OHMPI) that want to set up an application for their specific healthcare needs from a template that has been localized to the United States.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documents

For more information and instructions for implementing and using a Master Person Index application, see the following documents in the Oracle Healthcare Master Person Index documentation set:

- *Oracle Healthcare Master Person Index United States Patient Solution User's Guide* [This document]
- *Oracle Healthcare Master Person Index Analyzing and Cleansing Data User's Guide*
- *Oracle Healthcare Master Person Index Australia Patient Solution User's Guide*
- *Oracle Healthcare Master Person Index Command Line Reports and Database Management User's Guide*

- *Oracle Healthcare Master Person Index Configuration Guide*
- *Oracle Healthcare Master Person Index Configuration Reference*
- *Oracle Healthcare Master Person Index Data Manager User's Guide*
- *Oracle Healthcare Master Person Index Installation Guide*
- *Oracle Healthcare Master Person Index Loading the Initial Data Set User's Guide*
- *Oracle Healthcare Master Person Index Match Engine Reference*
- *Oracle Healthcare Master Person Index Message Processing Reference*
- *Oracle Healthcare Master Person Index Provider Index User's Guide*
- *Oracle Healthcare Master Person Index Real-time Loader User's Guide*
- *Oracle Healthcare Master Person Index Release Notes*
- *Oracle Healthcare Master Person Index Security Guide*
- *Oracle Healthcare Master Person Index Standardization Engine Reference*
- *Oracle Healthcare Master Person Index United Kingdom Patient Solution User's Guide*
- *Oracle Healthcare Master Person Index User's Guide*
- *Oracle Healthcare Master Person Index Working With HPD Profile Application User's Guide*
- *Oracle Healthcare Master Person Index Working With IHE Profiles User's Guide*

Note: These documents are designed to be used together when implementing a master index application.

Finding Information and Patches on My Oracle Support

Your source for the latest information about Oracle Healthcare Master Person Index is Oracle Support's self-service Web site My Oracle Support (formerly MetaLink).

Before you install and use Oracle Healthcare Master Person Index, always visit the My Oracle Support Web site for the latest information, including alerts, White Papers, installation verification (smoke) tests, bulletins, and patches.

Creating a My Oracle Support Account

You must register at My Oracle Support to obtain a user name and password account before you can enter the Web site.

To register for My Oracle Support:

1. Open a Web browser to <https://support.oracle.com>.
2. Click the **Register here** link to create a My Oracle Support account. The registration page opens.
3. Follow the instructions on the registration page.

Signing In to My Oracle Support

To sign in to My Oracle Support:

1. Open a Web browser to <https://support.oracle.com>.
2. Click **Sign In**.

3. Enter your user name and password.
4. Click **Go** to open the My Oracle Support home page.

Finding Information on My Oracle Support

There are many ways to find information on My Oracle Support.

Searching by Article ID

The fastest way to search for information, including alerts, White Papers, installation verification (smoke) tests, and bulletins is by the article ID number, if you know it.

To search by article ID:

1. Sign in to My Oracle Support at <https://support.oracle.com>.
2. Locate the Search box in the upper right corner of the My Oracle Support page.
3. Click the sources icon to the left of the search box, and then select **Article ID** from the list.
4. Enter the article ID number in the text box.
5. Click the magnifying glass icon to the right of the search box (or press the Enter key) to execute your search.

The Knowledge page displays the results of your search. If the article is found, click the link to view the abstract, text, attachments, and related products.

Searching by Product and Topic

You can use the following My Oracle Support tools to browse and search the knowledge base:

- **Product Focus** — On the Knowledge page under Select Product, type part of the product name and the system immediately filters the product list by the letters you have typed. (You do not need to type "Oracle.") Select the product you want from the filtered list and then use other search or browse tools to find the information you need.
- **Advanced Search** — You can specify one or more search criteria, such as source, exact phrase, and related product, to find information. This option is available from the **Advanced** link on almost all pages.

Finding Patches on My Oracle Support

Be sure to check My Oracle Support for the latest patches, if any, for your product. You can search for patches by patch ID or number, or by product or family.

To locate and download a patch:

1. Sign in to My Oracle Support at <https://support.oracle.com>.
2. Click the **Patches & Updates** tab. The Patches & Updates page opens and displays the Patch Search region. You have the following options:
 - In the **Patch ID or Number is** field, enter the number of the patch you want. (This number is the same as the primary bug number fixed by the patch.) This option is useful if you already know the patch number.
 - To find a patch by product name, release, and platform, click the **Product or Family** link to enter one or more search criteria.
3. Click **Search** to execute your query. The Patch Search Results page opens.

4. Click the patch ID number. The system displays details about the patch. In addition, you can view the Read Me file before downloading the patch.
5. Click **Download**. Follow the instructions on the screen to download, save, and install the patch files.

Finding Oracle Documentation

The Oracle Web site contains links to all Oracle user and reference documentation. You can view or download a single document or an entire product library.

Finding Oracle Health Sciences Documentation

To get user documentation for Oracle Health Sciences applications, go to the Oracle Health Sciences documentation page at:

<http://www.oracle.com/technetwork/documentation/hsgbu-154445.html>

Note: Always check the Oracle Health Sciences Documentation page to ensure you have the latest updates to the documentation.

Finding Other Oracle Documentation

To get user documentation for other Oracle products:

1. Go to the following Web page:

<http://www.oracle.com/technology/documentation/index.html>

Alternatively, you can go to <http://www.oracle.com>, point to the Support tab, and then click **Documentation**.

2. Scroll to the product you need and click the link.
3. Click the link for the documentation you need.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

United States Patient Solution Using OHMPI

This chapter introduces you to the Oracle Healthcare Master Person Index (OHMPI) United States Patient Solution. It also provides instructions that help you to use the solution template to create and generate a patient application using OHMPI, set up a database, set resources in an application server, and then build and deploy the application. But it goes beyond this, for you will need to set your matching and standardization levels to ensure that your project is set up to function per your specifications. You will also need to configure your application specifically to your healthcare enterprise. This guide will provide pointers to OHMPI documents that contain detailed information on what you need to know to perform these tasks.

This chapter is divided into:

- What you Need to Know
- What You Need to Do

These sections provide information about the United States Patient Solution, why you should use it, and an overview on how to use it. The purpose of the solution is to help you solve a business problem.

What You Need to Know

The following section provides conceptual information about the United States Patient Solution.

- [Understanding the Benefits of the United States Patient Solution](#) on page 1-2

What You Need to Do

The first section provides a procedure that leads you through using the United States Patient Solution with OHMPI to create an application, configure it, and then deploy it. The second details setting-up a database (if one is not in place) and setting resources in an application server. The final section presents an overview procedure for using the Master Index Data Manger (MIDM) to manage an OHMPI project.

- [Using the United States Patient Solution](#) on page 1-2

This includes the following sections:

- [Creating and Configuring the United States Patient Solution Application](#) on page 1-3
- [Setting Up a Database and the Application Server](#) on page 1-6
- [Deploying the OHMPI Application](#) on page 1-8
- [Opening and Using the Master Index Data Manager](#) on page 1-9

Understanding the Benefits of the United States Patient Solution

This section introduces you to the United States Patient Solution template. The purpose is to help you solve a business problem by providing you with a template that is configurable to your specific requirements, enabling you to create a single patient solution that includes all required and optional bits of information that are specific to each and every patient in your healthcare system. After the database is completed and operational, you will have a patient model that eliminates errors inherent in systems that have patient information spread throughout a number of hard copy and electronic systems that is easy to access and use.

This patient template comes with an object model, code modules in `codelist.sql`, a set of match fields, and block searches. The configurations include ballpark numbers that function. The United States Patient Solution template provides much more completeness than our previously released "Person" object model and enables you to set up your healthcare solution without having to create everything from scratch. When studying the solution, observe that it addresses all pertinent bits of patient information, including insurance, medical condition, and medications.

Note: In reality, all OHMPI projects require much more fine-tuning and custom plug-ins to satisfy site specific requirements.

As this template was specifically designed for United States healthcare, it allows you to create an OHMPI project in a reasonably short amount of time. With an Oracle database in place, the projects created with this template can be generated, deployed and run. Benefits for using the solution include:

- Set up of patient solution template using Oracle Healthcare Master Person Index
 - Enables easy alteration of the template to suit your requirements
 - Combines and standardizes records into a single patient database
 - Enables merging of disparate legacy patient databases
- Completed United States Patient Solution
 - Enables web services connectivity
 - Enables fully-functioning patient knowledge base
 - Reduces patient identity errors
 - Increases reliability while reducing cost

Using the United States Patient Solution

If you are new to OHMPI, you may want to see the *Oracle Healthcare Master Person Index User's Guide* for it gives you an overview and provides detailed steps for setting up a master person index application. For information on how to start and use the Master Index Data Manager (MIDM), see the *Oracle Healthcare Master Person Index Data Manager User's Guide*. These guides feature the following:

- Create the OHMPI application
- Configure code lists
- Create the database
- Define the database connection

- Define security
- Build and deploy the project
- Launch Master Index Data Manager

The purpose of the previously mentioned guides is to give you an overall view of the steps involved to create a master person index application. However, and this is important, if you decide to use the United States Patient Solution as your model, you do not need to create it from scratch. From within NetBeans IDE use OHMPI's project wizard to navigate to and select the United States Patient Solution project icon. As the project has already been created and the object structure is in place, all you have to do is move through a number of steps and set-up the template so that it serves your company's requirements.

The following sections provide the information you need to create an OHMPI application from the United States Patient Solution, set-up a database (if you have not done so already), setting your resources in an application server, and using the MIDM to manage your project:

- [Creating and Configuring the United States Patient Solution Application](#) on page 1-3
- [Setting Up a Database and the Application Server](#) on page 1-6
- [Deploying the OHMPI Application](#) on page 1-8
- [Opening and Using the Master Index Data Manager](#) on page 1-9

Creating and Configuring the United States Patient Solution Application

Before You Begin

Ensure that OHMPI is installed before beginning this procedure.

To Create an MPI Application

1. On the NetBeans toolbar, click **New Project**.

The New Project wizard appears, and opens on the Choose Project window.

2. Under Categories select **OHMPI**, under Projects select **Master Person Index Application**, and then click **Next**.

The Name and Location window appears with default NetBeans project name and directory paths.

3. Enter a NetBeans project name and the path where you want to store the project files in the upper portion of the window or accept the defaults.
4. Select the application server you are using from the drop down list.

- a. If no application servers appear in the list, click **Manage**.

The Servers window appears.

- b. Click **Add Server**.

The Add Servers Instance window appears.

- c. Select the Oracle WebLogic Server, and click **Next**.

- d. Under Server Location, browse to the location of your application server, or accept the defaults and click **Finish**.

You are returned to the Servers window with the application server you selected listed under Servers in the left pane.

- e. Click **Close**.

The Name and Location window reappears.

5. The **Set as Main Project** is selected; if you do not want this master person index to be the main project, deselect the option.
6. Click **Next**.

The Name Application window appears with a default application name.

Before you can configure a new master person index application, you should give the application a unique name. It is a good practice to give each master person index application a unique name you create because certain components within the application server are based on the application name. Dependent components include the data source for the JDBC connection and the outbound Topic (if one is used).

7. In the **Application** field, enter a name for the new master person index application (for example, USPatient), and then click **Next**.

The Define Source Systems window appears.

8. In the **Name** field, enter the processing code of one of the source systems that will share data in the master person index system (for example, HOS or MC), and then click **Add** (see below).

The source system is the key to your network. If it is a hospital (for example, Hospital or Medical Center, the system might be HOS or MC), all of its patient records would be sent into the master person index with a system code/LID of HOS/120210210 or MC/48481234. For more information on the LID, see the *Oracle Healthcare Master Person Index User's Guide*.

You can enter any of the following characters:

- ! _ ~ () { } + \ Q # \$ % & ; : - /
- a-z
- A-Z
- 0-9
- þ ÿ Þ ß 'à-ö ø-ý À-Ö Ø-Ý

The value you entered appears in the Systems box.

Note: Be sure to enter the processing code of the system and not the name. This value is entered in `update.xml` for defining survivor strategies for the single best record (SBR).

9. Perform any of the following:
 - To define additional systems, repeat the above step for each source system that will share information with the master person index application.
 - To remove a system from the list, highlight the name of that system in the Systems box, and then click **Remove**.
 - To remove all systems from the list, click **Remove All**.

10. When you have defined all required source systems, click **Next**.

The Define Deployment Environment window appears.

11. Enter the following information to specify information about the deployment environment, including the database, date and time formats, and transaction mode:
 - **Database** - The type of database being used for the master person index application. Select **Oracle**.
 - **Date and Time Formats** - The date and time formats for the master person index system. This defines how date and time must be entered and how they appear on the MIDM. These formats acts as a default format if you do not set the field level format.
 - **Object Date Format**: This is the default or application level format used by OHMPI backend for the *date* data type.
 - **Object Time Format**: This is the default or application level format used by OHMPI backend for the *timestamp* data type.
 - **MIDM Date Format**: This is the default or application level format used by MIDM for the *date* data type.
 - **MIDM Time Format**: This is the default or application level format used by MIDM for the *timestamp* data type.
 - **Transaction Mode** - An indicator of whether transactions are distributed. Select one of the following options:
 - **XA (across applications)**, if the transactions will be distributed across multiple applications.
 - **XA (within application only)**, if the transactions will be distributed just across the master person index application.
 - **Local**, if the transactions will not be distributed.

12. Click **Next**.

The Define Enterprise Object window appears.

13. Click the **Properties** tab.

14. Enter the required values.

The date format that you configure here gets copied to object.xml.

15. Click the **MIDM** tab.

16. Enter the required values.

The date format that you configure here gets copied to midm.xml.

17. From the drop-down list of the Add Solution icon, select **Patient** and then **USPatient**.

The object model is populated. It has been pre-set, that is all the object fields were already created with a set of default properties that define each field, and you are unable to change anything.

Note: If you mistakenly selected the wrong patient solution when you started the procedure, you can remove this patient solution by clicking the red X in the tool bar and selecting another patient solution.

18. Click Next.

The Generate Project Files window appears which lists the files that will be generated. You can choose to generate the remaining master person index files now by checking the box, but if you intend to change the configuration you will need to again generate all the application files.

19. Click Finish.

20. In the Projects pane (left side of NetBeans), if not already expanded, expand the United States Patient Solution you just created.

21. Right-click Configuration and then select Edit.

The Configuration Editor opens on the right side of the window. For detailed information about the Master Person Index object field properties, see *Oracle Healthcare Master Person Index User's Guide*.

22. As desired, modify the object properties for any field to suit your data processing, storage, and display requirements. After you modify a property value, press Enter to apply the change.

23. When you have completed configuring the object fields, right-click USPatient application and select Generate Master Index Files.

The patient solution came with `codelist.sql` and `systems.sql`. When you generate the master index files, four additional SQL files are created: `create.sql`, `drop.sql`, `create-index.sql`, and `drop-index.sql`.

You are now ready to set up the database and resources on the application server.

Setting Up a Database and the Application Server

Before you are able to use the Master Index Data Manager, you need to perform a few tasks that are required for runtime to function properly. These include:

- [Creating a Database \(Oracle\)](#) on page 1-6
- [Using the Admin Console to Set Resources \(WebLogic\)](#) on page 1-7

Creating a Database (Oracle)

Before you begin, make sure you have Oracle installed as a service with remote host access enabled. Perform the following steps to create all databases:

1. Create an Oracle environment and user for the Master Person Index tables by running the following command (assuming that `mpi` is the `USER_NAME` in the following steps):

```
grant CREATE SESSION, CREATE TABLE, CREATE TRIGGER, CREATE PROCEDURE,  
UNLIMITED TABLESPACE, CREATE TYPE to <USER_NAME> identified by <PASSWORD>
```

2. Open `systems.sql` in a Text Editor, and add the source systems with which you will be sharing data.

Note: See Step 5 for the location of this file.

For more information about modifying this file, see in the *Oracle Healthcare Master Person Index User's Guide*.

3. Open `codelist.sql` in a Text Editor, and add any common code information you need for the master person index system.

Note: See Step 5 for the location of this file.

For more information about code lists and modifying this file, see in the *Oracle Healthcare Master Person Index User's Guide*.

Note: This step is optional. The default configuration does not use common code tables. Adding this feature will cause additional validations to be performed against incoming data.

4. Log in to the **mpi** schema as the user you created above.
5. Run the following SQL files against the **mpi** schema (`<project_name>\src\DatabaseScript`). The `create.sql` file must be run first.
 - `create.sql`
 - `systems.sql`
 - `codelist.sql`
 - `create-index.sql`

Using the Admin Console to Set Resources (WebLogic)

To Create JDBC Data Resources for an MPI Application Project for Oracle

1. Start and stop the Oracle WebLogic Server. For instructions, see *Oracle Fusion Middleware Online Documentation 12c Release 1 (12.1.3)*.
2. Launch the **Oracle WebLogic Server Administration Console**.
3. Log in using the default user Name (**weblogic**) and Password (**welcome1**).
The Oracle WebLogic Administration Console appears.
4. On the left panel, under Domain Structure, expand **Services**, click **JDBC**, and then choose **Data Sources**.
A Summary of JDBC Data Sources appears in the right panel.
5. To create a new JDBC Data Source click **New** at the bottom of the right panel.
Settings for a new JDBC Data Source appear. It is here that you will create a new JDBC Data Source.
6. In the **Name** field, type `<application_name>DataSource`.

For example, `USPatientDataSource`. For information on the application name, see [Creating and Configuring the United States Patient Solution Application](#) on page 1-3.

7. In the **JNDI Name** field, type `jdbc/<application_name>DataSource`.
Use the name you entered in step 6 here (for example, `jdbc/USPatientDataSource`).
8. Click **Save**.
A new page appears in the right panel which is for setting the Database Type.
9. In the **Database Type** drop-down list, choose the appropriate type (for example: **Oracle**).
10. In the **Database Driver** drop-down list, choose the appropriate driver; for example: **Oracle's Driver (Thin XA) for Instance Connections; Versions: 9.0.1; 9.2.0; 10, 11**.
11. Click **Next**.
12. Click **Next**.
Connection Properties appears on the Create a New JDBC Data Source panel. Use it to define the connection properties.
13. In the **Database Name** field, type a name for the database to which you want to connect (for example: `Person`).
14. In the **Host Name** field, type the name or the IP address of the database server (for example: `localhost`).
15. In the **Port** field, type the port on the database server that is used to connect to the database (for example: `1521`, the default for Oracle).
16. In the **Database User Name** field, type the database account user name you want to use to create database connections (for example: `mpi`).
17. In the **Password** field, type a password for your database account to use to create database connections.
18. In the **Confirm Password** field, re-type the password to confirm it.
19. Click **Next**.
The Settings for `<application_name>DataSource` page appears in the right panel.
20. Click the **Connection Pool** tab, click **Test Configuration**, and then click **Next**.
Select Targets appears on the Create a New JDBC Data Source page in the right panel. Here you select one or more targets to deploy the new JDBC data source.
21. In the Servers check list, select one or more target servers and click **Finish**.

Note: If you do not select a target, the data source will be created but not deployed. You will need to deploy the data source at a later time.

22. Repeat the above steps to create `jdbc/<application_name>SequenceDataSource`.
You are now ready to deploy your application.

Deploying the OHMPI Application

1. On the left panel of the WebLogic Server Admin Console, under Domain Structure, select **Environment** and then choose **Deployments**.

The Summary of Deployments panel appears.

2. On the right side of the panel under Deployments, click **Install**.

A Summary of Deployments panel with a Deployments table containing a list of EAR files appears.

3. Locate your application EAR and click **Next**.

The Install Application Assistant page appears in the right panel.

4. Locate the deployment you want to install and prepare for deployment.

Tip: Select the file path that represent the application root directory, archive file, exploded archive directory, or application module descriptor that you want to install. You can also enter the path of the application directory or file in the Path field.

Note: Only valid file paths are displayed. If you cannot find your deployment files, upload your file(s) and/or confirm that your application contains the required deployment descriptors.

5. Click **Next**.

Note: When deploying an OHMPI EAR file through the WebLogic Admin Console, under Security make sure that you choose **DD Only**. If you choose one of the other options, you will not be able to log into the MIDM.

6. Click **Finish**.

You are now ready to open the MIDM and manage your OHMPI project.

Opening and Using the Master Index Data Manager

1. Open the Master Index Data Manager.

The Master Index Data Manager (MIDM) is a web-based interface that allows you to access, monitor, and maintain the data stored by the master person index applications you create using OHMPI. Use the MIDM to search for, add, update, deactivate, merge, unmerge, and compare object profiles. You can also view and correct potential duplicate profiles, view transaction histories, view an audit log, and print reports.

The MIDM is your primary tool to view and maintain the data stored in the master index database and cross-referenced by a master index application.

- a. Using a browser, enter the URL to open the MIDM:
`http://localhost:<http-port-number>/<application-name>MIDM.`

Note: The default port number for WebLogic is **7001**. For `<http-port-number>` you need to use the port number defined during your OHMPI installation. The `<application-name>` is the name of the application you entered when you began to create the Master Person Index application. For example, **USPatient** for the USPatient solution, making the key string **USPatientMIDM**.

- b.** Log into the MIDM using **ohmpi** or your user for the User ID and Password.

For information about logging in and logging out of the MIDM, see *Oracle Healthcare Master Person Index Data Manager User's Guide*.

- 2.** Use the MIDM to add new records.

This provides the initial steps for creating a new record, and then offers suggestions for you to try as you familiarize yourself with the United States Patient Solution and using Master Index Data Manager to tweak the solution to meet your particular requirements.

To view tables that describe the properties you define on the MIDM Field Properties page of the wizard, see *Oracle Healthcare Master Person Index User's Guide*.

- a.** In the MIDM GUI, click **Source Record**.
 - b.** To create a new record, click **Add**.
 - c.** In the **Pick Out System** drop-down list, choose **Oracle**.
 - d.** Enter a Local ID.
For example, **444-444-4444**.
 - e.** In the USPatient information section, at a minimum, specify the required values.
 - f.** To add the record, click **Submit**.