

HealthShare Referral Manager (HSRM)

VA Employee User Guide

Department of Veterans Affairs
Office of Information and
Technology

Version 7.0
Build 3.0
August 2018



Revision History

Version	Date	Author	Description
1.0	08/11/2017	CCRA Training Team	First version of HealthShare Referral Manager Participant Manual for User Functionality Testing
1.1	09/15/2017	CCRA Training Team Morgan Byrd	<p>Updates include:</p> <ul style="list-style-type: none">• Updated all screenshots based on new system release• Updated Figure 1 Referral Lifecycle Model• Updated Table 1 to correspond to new Figure 1 graphic• Updated Workflow 1 to correspond to new Figure 1 graphic• Updated Workflows 4,5, and 6 to correspond to new Figure 1 graphic• Added exporting function to section 5.0 C View Analytics• Added section 5.0 D Run Reports• Added section 6.1 Sort the Referral List• Added section 6.3 Tasks• Added section 6.4 Record Patient Contact
2.0	09/16/2017	Susan Burke	Quality Manager Review

Version	Date	Author	Description
2.1	01/24/2018	Lauren Shaman, Justin Gaines	<p>Update</p> <ul style="list-style-type: none"> • TOC: Updated table of contents, table of figures, and table of tables • Throughout document: Changed Helpful Tips to Notes • Added language to reflect and highlight the benefits of HSRM in section 1.0 • Added additional user roles to the HSRM user roles table/spelled out acronyms in section 2.0 • Updated the HSRM referral lifecycle model to align to user roles/responsibilities in HSRM in section 3.0 • Added section 4.0 HSRM Essentials • Added section 5.0 Locate a Referral • Added section 6.0 Sort a List • Added section 7.0 Manage Tasks • Added section 8.0 Referral Details • Added section 9.0 Add Documents • Added section 10.0 Record Patient Contact • Added section 11.0 Allocate Referral to a Community Care Provider/Facility • Added section 12.0 Accept/Reject Referral • Added section 13.0 Manage Appointments • Added section 14.0 Indicate Care Given • Added section 15.0 Access an Audit Trail • Added section 16.0 Reporting and Analytics
2.2	01/18/2018	Adine Hoffman	Peer Review
2.3	01/20/2018	Rachael Novalis	Manager Review
2.4	01/30/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Updated version number on title page • Throughout document: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Applied appropriate text styles ◦ Changed CC to community care where appropriate ◦ Changed HSRM to HealthShare Referral Manager ◦ Clarified alt text • Updated content to match mandatory intro text in section 1.2 • Added a table of acronyms and abbreviations in Appendix A

Version	Date	Author	Description
2.5	02/05/2018	Susan Burke	Deputy Project Manager Review
2.6	03/05/2018	Justin Gaines	<ul style="list-style-type: none"> • Updated table of contents, table of figures, and table of tables • Change language throughout document to reflect new procedures and processes • Updated the HealthShare Referral Manager lifecycle diagram • Updated Table 1.0 with new lifecycle process and statuses • Added section 4.0 HealthShare Referral Manager Account Request • Added section 5.0 HealthShare Referral Manager Access • Added language for lock icon in section 6.1 • Added language for logout button in section 6.1 • Added section 7.0 Eligibility Form • Added section 9.0 Offline Referral Form • Added section 10.0 Assign a Referral to a User • Added section 11.7 Automated Task • Added section 18.1 Reject a Referral • Added section 19.0 Close Referral • Added section 22.0 Provision Users
2.7	03/08/2018	Zainab Ashraf	Peer Review
2.8	03/12/2018	Rachael Novalis	Training Lead Review
2.9	03/14/2018	Sheila Petaccio	Project Manager Review
2.10	03/15/2018	Morgan Byrd	508 Review
2.11	03/19/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Throughout doc: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Changed HealthShare Referral Manager to HSRM where appropriate ◦ Made “Community Care” and “Community Provider” lowercase where appropriate • Appendix A: Updated table of acronyms
3.0	03/20/2018	Susan Burke	DPM Review

Version	Date	Author	Description
3.1	03/28/2018	Justin Gaines	<p>Updated based on MR12 Release</p> <ul style="list-style-type: none"> • Added Section 14.1.1 View Additional SEOC Information • Added Section 19.1.1 Add a Provider to an Appointment • Updated Section 2.1 The Lifecycle Referral Diagram <p>Updated the figure numbers</p>
3.2	03/28/2018	Rachael Novalis	Training Lead Review
3.3	03/29/2018	Aamir Syed	Project Manager Review
3.4	03/30/2018	Morgan Byrd	<p>508 Review</p> <ul style="list-style-type: none"> • Checked for alt text • Added header rows for each table • Checked heading structure
3.5	04/02/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Title page and footer: Updated month • Throughout doc: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Added and corrected alt text for images ◦ Corrected errors in image captions • Section 1.1: Updated intro text • Section 11: Added spell out for SEOC • Appendix A: Updated table of acronyms
4.0	04/03/2018	Susan Burke	DPM Review
5.0	06/25/2018	Justin Gaines	<ul style="list-style-type: none"> • Updated Section 2.1 The Lifecycle Referral Diagram • Added Section 14.1.2 View Additional SEOC Information from the Referral Details Screen • Added Section 19.2 Record an Appointment from the Component Menu icon • Changed language to section 13.7 Automated Task to read (25 days of the status being changed to Initial Care Given or 25 days after the earliest appointment) • Updated screen shots to reflect interface updates • Updated figure numbers, table of contents

Version	Date	Author	Description
5.1	06/29/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Throughout doc: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Corrected figure numbers • Section 1.1: Updated intro text • Section 9.2: Deleted duplicate step (no. 7) • Appendix A: Updated table of acronyms
6.0	07/03/2018	Susan Burke	DPM Review
6.1	07/13/2018	Justin Gaines	<ul style="list-style-type: none"> • Throughout doc: <ul style="list-style-type: none"> ◦ Updated hyperlinks ◦ Added language to explain Priority, Status, and Appointment Hyperlinks ◦ Made minor changes to language
6.2	07/13/2018	Rachael Novalis	Training Lead Review
6.3	07/16/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Title page and footer: Updated version number • Throughout doc: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Verified accuracy of hyperlinks
6.3	07/13/2018	Morgan Byrd	<p>508 Review</p> <ul style="list-style-type: none"> • Checked for alt text • Added header rows for each table • Checked heading structure
6.4	07/20/2018	John Bingham	<ul style="list-style-type: none"> • Added section 12.1 “Generate Multiple Offline Referral Forms” and related screenshots • Added screenshot to section 20.1 • Added new automated tasks to section 14.6
6.5	07/22/2018	Rachael Novalis	Training Lead Review
6.6	07/23/2018	John Bingham	<ul style="list-style-type: none"> • Added section 8 “View Other Health Insurance” • Updated figures, table of content • Added alt text • Added Appendix B “Document Type Definitions”

Version	Date	Author	Description
6.7	08/07/2018	Sam Weaver	<p>QC Review</p> <ul style="list-style-type: none"> • Title page and footer: Updated month and version number • Throughout doc: <ul style="list-style-type: none"> ◦ Made minor changes to language and grammar ◦ Verified links and updated them where necessary ◦ Reviewed alt text • Tables 3 and 4: Updated formatting for consistency • Appendix A: Updated table of acronyms • Appendix B: Inserted a page break so it starts on a new page
7.0	8/10/2018	Susan Burke	DPM Review

Table of Contents

1. Introduction	14
1.1. Project and Solution Overview	14
1.2. HSRM Benefits	14
1.3. User Guide Purpose	14
2. User Guide Overview	15
2.1. HSRM Lifecycle Process	15
3. HSRM Users.....	16
4. HSRM Account Request	17
5. HSRM Access	17
6. HSRM Essentials.....	18
6.1. HSRM Frame	18
6.2. Patient Banner	19
6.3. Breadcrumb Trail/Back Feature	19
6.4. Mandatory Fields	20
6.5. HSRM Icons.....	20
6.6. Canned Text	21
6.7. Calendar Dates.....	22
6.8. Search Rules	22
6.9. Save Data	22
6.10.HSRM Keyboard Shortcuts.....	23
7. Receive a Referral.....	25
8. View Other Health Insurance (OHI).....	25
9. View Eligibility Form	26
10. Locate a Referral.....	28
10.1.Find Referral by Patient	28
10.2.Find Referrals	30
10.3.Referral List	32
11. Locate a Provider	33
12. Assign a Referral to a Facility Community Care Staff Member	34
13. Generate an Offline Referral Form	35
13.1.Generate Multiple Offline Referral Forms	37
13.2.Print an Offline Referral Form	39
13.2.1. Print an Offline Referral Form in Chrome.....	39
13.2.2. Print an Offline Referral Form in Internet Explorer.....	40
13.3.Download an Offline Referral Form.....	41

13.3.1. Download an Offline Referral Form in Chrome	42
13.3.2. Download an Offline Referral Form in Explorer	42
14. Sort a List.....	43
15. Manage Tasks.....	45
15.1.View a Task List.....	45
15.2.Add a Task.....	45
15.2.1. Add a Task from the Referral Details Screen.....	45
15.2.2. Add a Task from the Referral List Screen	46
15.3.Complete the Add Task Screen	47
15.4.Assign a User to a Task.....	48
15.5.Complete a Task.....	50
15.6.Automated Tasks	50
16. View Referral Details.....	51
16.1.View Additional Referral Information.....	51
17. View SEOC Information	53
17.1.View Additional SEOC Information from the Patient Details Screen.....	53
17.2.View Additional SEOC Information from the Referral Details Screen	54
18. Add Documents.....	55
19. Record Patient Contact	58
20. Assign a Referral to a Community Provider/Facility.....	60
21. Accept a Referral.....	61
21.1.Reject a Referral.....	62
22. Manage Appointments.....	64
22.1.Record an Appointment	64
22.1.1. Add a Community Provider to an Appointment	65
22.2.Record an Appointment from the Component Menu Icon.....	66
22.3.Cancel an Appointment.....	68
23. Indicate Initial Care Given	69
24. Close a Referral.....	71
25. Access an Audit Trail.....	72
26. Reports.....	73
26.1.Run a Report	73
26.2.Print a Report.....	75
26.2.1. Print a Report in Chrome	75
26.2.2. Print a Report in Explorer.....	76
26.3.Download a Report	78

26.3.1. Download a Report in Chrome.....	78
26.3.2. Download a Report in Explorer	79
27. User Provisioning	80
27.1.Access User Setup Tools.....	80
27.2.Search for Users.....	81
27.3.Add Users	83
27.4.Manage User Access and Security Profiles	84
27.5.Add Logon Locations	85
28. Help Desk Support	86
Appendix A: Acronyms and Abbreviations	87
Appendix B: Document Type Definitions	88

Table of Figures

Figure 1: Referral Lifecycle Model.....	15
Figure 2: HSRM Frame – Open Profile, Menu, and Home Icons	18
Figure 3: Referral Details Screen – Patient Banner	19
Figure 4: Referral Details Screen – Breadcrumb Trail.....	20
Figure 5: Accept Task/Update Button Grayed Out	20
Figure 6: Referral Processing Information Section – Canned Text	22
Figure 7: Consult Toolbox – Send to HSRM for Referral.....	25
Figure 8: Action Menu Icon	26
Figure 9: Referral Details Screen – Action Menu List.....	26
Figure 10: Other Health Insurance Screen.....	26
Figure 11: Referral List – Action Menu Icon	27
Figure 12: Referral List – Menu List	27
Figure 13: Eligibility Form.....	28
Figure 14: Menu Options – Find Referral by Patient	29
Figure 15: Patient Search Screen – Find Button	30
Figure 16: Referral List Screen – Find Referrals	31
Figure 17: Inquiry Selection Screen	32
Figure 18: Find Provider – Menu List	33
Figure 19: Provider Search Screen	34
Figure 20: Main Details Screen	34
Figure 21: Referral Details Screen – Assigned User	35
Figure 22: Referral Details Screen – Component Menu Icon	36
Figure 23: Referral Details Screen – Offline Referral Form.....	36
Figure 24: Offline Referral Form.....	37
Figure 25: Referral List Screen – Multiple Offline Referral Form Checkbox	37
Figure 26: Referral List Screen – Component Menu	38
Figure 27: Referral List Screen – Component Menu	38
Figure 28: Multiple Offline Referral Forms Document	39

Figure 29: Offline Referral Form in Chrome – Print Icon	40
Figure 30: Print Screen in Chrome – Print Button	40
Figure 31: Offline Referral Form in Explorer – Print Icon.....	41
Figure 32: Print Screen in Explorer – Print Button.....	41
Figure 33: Offline Referral Form in Chrome – Download Icon.....	42
Figure 34: Save As Window in Chrome – Save Button	42
Figure 35: Offline Referral Form in Explorer.....	43
Figure 36: Save As Window in Explorer – Save Button.....	43
Figure 37: Referral List Screen – Status	44
Figure 38: Referral List Screen – Sorting Options.....	44
Figure 39: Referral List Screen – Task List	45
Figure 40: Patient Banner – Action Menu.....	46
Figure 41: Referral Details Screen – Add Task	46
Figure 42: Task Edit Screen – Task Item, Priority, and Status	46
Figure 43: Referral List Screen – Action Menu.....	47
Figure 44: Task Edit Screen – Assign Task	47
Figure 45: Task Edit Screen – Assign Task to User Field and Update Button	48
Figure 46: Referral List Screen – Task List	48
Figure 47: Task List Screen – Task: Add Documentation	49
Figure 48: Task Edit Screen – Assign Task and Update Button.....	49
Figure 49: Task List Screen – Completed Checkbox	50
Figure 50: Referral Details Screen – Processing and Treatment Details	51
Figure 51: Referral List – Action Menu Icon	52
Figure 52: Referral List – Action Menu List	52
Figure 53: Additional Referral Information Screen	52
Figure 54: Patient Banner – Action Menu.....	53
Figure 55: Menu List – Patient Details.....	53
Figure 56: Patient Details – SEOC	54
Figure 57: SEOC List – Preauthorization Details	54
Figure 58: List of SEOC Services.....	54
Figure 59: Referral Details Screen – SEOC Details Link.....	55
Figure 60: SEOC Services Screen	55
Figure 61: Referral Details Screen – Add Documents.....	56
Figure 62: Documents Screen – New Button	57
Figure 63: New Scan Screen – Attach File.....	58
Figure 64: Documents List Screen – Back to Referral Details.....	58
Figure 65: Patient Referral List – Referral	59
Figure 66: Referral Details Screen – Action Menu	59
Figure 67: Action Menu – Record Patient Contact	59
Figure 68: Inquiry Contact Screen – Update	60
Figure 69: Referral Details Screen – Network Drop-Down List	60
Figure 70: Referral Details Screen – Network Field	61
Figure 71: Referral Details Screen – Community Provider/Facility Field.....	61
Figure 72: Referral Details Screen – Accepted Status	62
Figure 73: Referral Details Screen – Referral Return Reason	63
Figure 74: Referral Details Screen – Rejected Status	63

Figure 75: Referral List – Appointment Edits	64
Figure 76: Record Appointment Screen – Update.....	65
Figure 77: Record Appointment Screen – Provider Search.....	65
Figure 78: Provider Search Screen – Specialty and Last Name	66
Figure 79: Record Appointment Screen	66
Figure 80: Referral Details Screen – Component Icon	67
Figure 81: Referral Details Screen – Record Appointment.....	67
Figure 82: Record Appointment Screen – Update.....	67
Figure 83: Record Appointment Screen – Date.....	68
Figure 84: Record Appointment Screen – Change Status.....	68
Figure 85: Record Appointment Screen – Update.....	69
Figure 86: Referral List Screen – Referral Information	69
Figure 87: Referral Details Screen – Change Status	70
Figure 88: Referral Details Screen – Change Status to Initial Care Given	70
Figure 89: Referral Details Screen – Treatment Information	71
Figure 90: Referral Processing Information – Closed Status.....	71
Figure 91: Referral Processing Information Section – Audit Trail.....	72
Figure 92: Data Audit Trail Screen – Referral Update	73
Figure 93: Data Audit Trail Fields Screen.....	73
Figure 94: Referral List – Reports: Referral Wait Times.....	74
Figure 95: Report Parameters Screen – Referral, Specialty, Consultant, and Print Preview	74
Figure 96: Wait List Times Report.....	75
Figure 97: Report in Chrome – Print Icon.....	76
Figure 98: Print Screen in Chrome – Print Button	76
Figure 99: Report in Explorer – Print Icon	77
Figure 100: Print Screen in Explorer – Print Button.....	77
Figure 101: Report in Chrome – Download Icon	78
Figure 102: Save As Window in Chrome – Save Button	79
Figure 103: Report in Explorer – Save As Icon	79
Figure 104: Save As Window in Explorer – Save Button.....	80
Figure 105: Menu List – User Setup.....	81
Figure 106: User Setup Screen.....	81
Figure 107: User Setup Screen – Code and Description.....	82
Figure 108: User Setup Screen – Results List	82
Figure 109: User Setup Screen – Logon Details	83
Figure 110: User Setup Screen – New Button	83
Figure 111: Logon Details Screen – Apply Button.....	84
Figure 112: Logon Details Screen – User Access and Security Profile	84
Figure 113: Logon Details – Security Group Field, Access Profile Field, and Apply Button.....	85
Figure 114: Logon Details Screen – Allow Change of Location at Logon.....	85
Figure 115: Logon Details – Logon Locations	86

Table of Tables

Table 1: Referral Lifecycle Steps	15
Table 2: User Roles.....	17
Table 3: Windows Operating System (OS) Shortcut Keys	23
Table 4: Mac OS Shortcut Keys	24
Table 5: Acronyms and Abbreviations.....	87
Table 6: Document Type Definitions	88

1. Introduction

1.1. Project and Solution Overview

HealthShare Referral Manager (HSRM) is an enterprise-wide system in support of community care used by facility community care staff to generate referrals and authorizations for Veterans receiving care in the community. Clinical and Department of Veterans Affairs (VA) community care staff located at VA medical centers, outpatient clinics, community-based outpatient clinics, and Veterans Integrated Service Network offices use this solution to enhance Veteran access to care. HSRM is an integral component of the community care information technology architecture that allows Veterans to receive care from community providers.

HSRM allows VA to transition from what is currently a largely manual process to a more streamlined process that generates standardized referrals and authorizations according to clinical and business rules. HSRM supports clinical and administrative processes expected to:

- Seamlessly provide eligible Veterans with prompt referrals to a community provider of their choice
- Provide community providers with referrals and authorizations consistent with industry standards
- Decrease the administrative burden on VA clinical and facility community care staff members by establishing clinical and business pathways that reflect best practices, consistent outcomes, and reduced turnaround times, along with a solution that automates those pathways
- Facilitate communication between facility community care staff and community providers via a unified platform that enables the secure exchange of medical information

1.2. HSRM Benefits

HSRM supports clinical and administrative community care referral and authorization processes, yielding the following benefits:

- Facilitation of the complex business of VA referral management for facility community care staff by leveraging automated business rules and workflows
- Increased Veteran access to care by reducing turnaround times for appointments
- Consolidation and streamlining of systems to apply the same user-friendly interface across VA

1.3. User Guide Purpose

This User Guide is a detailed, step-by-step reference for HSRM end users to:

- Understand the overall HSRM scope, benefits, and purpose
- Become oriented to HSRM processes and roles
- Gain role-based instruction on HSRM functionality

This user guide is updated incrementally as HSRM builds are released.

2. User Guide Overview

2.1. HSRM Lifecycle Process

A community care referral's lifecycle in HSRM begins from the time it is received in HSRM and continues until the episode of care is complete and the referral is closed. **Figure 1** illustrates this process.

Figure 1: Referral Lifecycle Model

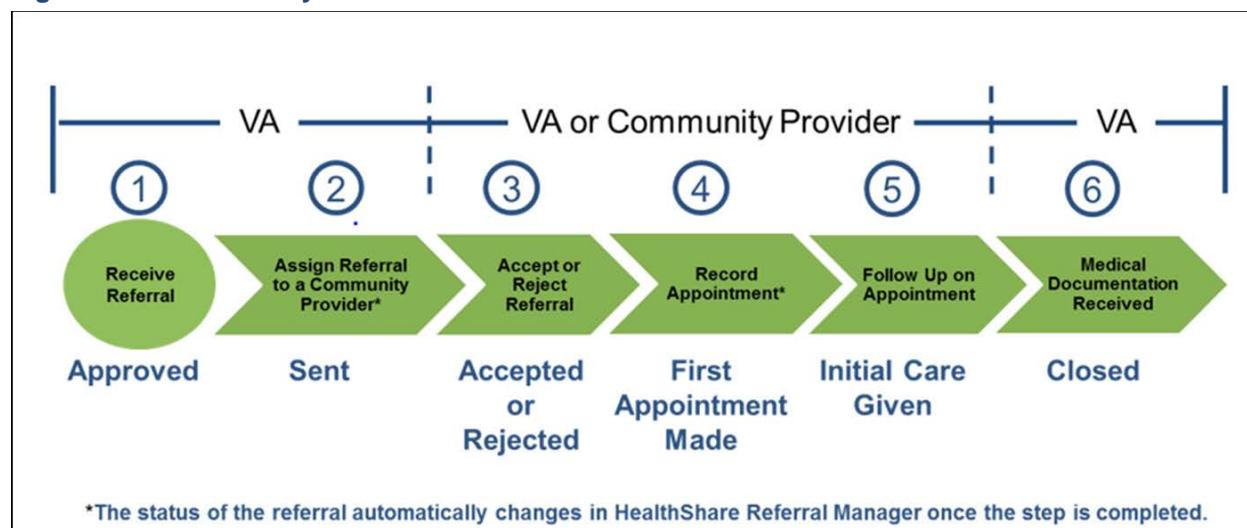


Table 1 provides a description of each step of the referral lifecycle process in HSRM. (For detailed descriptions, click the blue hyperlinks found throughout the user guide.)

Table 1: Referral Lifecycle Steps

#	Title	Responsible Party	Description	Status
1	Receive a Referral	System	HSRM receives the referral from the Computerized Patient Record System (CPRS).	Approved (System Status)
2	Assign Referral to a Community Provider/ Facility	Facility Community Care Staff Member	The referral is reviewed and assigned to a community provider/facility by a facility community care staff member.	Sent (Automatic Change)

#	Title	Responsible Party	Description	Status
3	<u>Accept a Referral</u> <u>Reject a Referral</u>	Community Provider/ Facility Community Care Staff Member	A community provider staff member at the community provider/facility or the facility community care staff member accepts or rejects the referral.  <i>Note: If the referral is rejected, it is sent back to VA to be reassigned.</i>	Accepted or Rejected (Manual Change)
4	<u>Record an Appointment</u>	Community Provider/ Facility Community Care Staff Member	The community provider/facility schedules the Veteran's appointment in an external system, and the community provider/facility or the facility community care staff member records the appointment in HSRM.	First Appointment Made (Automatic Change)
5	Follow Up on Appointment	Community Provider/ Facility Community Care Staff Member	Once the first appointment is completed, the community provider/facility or the facility community care staff member enters information regarding the appointment, including treatment notes and uploads medical documentation in HSRM.	<u>Initial Care Given</u> (Manual Change)
6	Medical Documentation Received	Facility Community Care Staff Member	After the Veteran has received all documented care and all medical documentation has been received, the facility community care staff reviews all medical documentation to ensure that the episode of care is completed, and all documentation was received.	<u>Closed</u> (Manual Change)

3. HSRM Users

VA staff and community providers use HSRM to manage the community care referral process. **Table 2** outlines the key functions each type of user performs in the HSRM lifecycle.

Table 2: User Roles

HSRM User Role	Tasks
Facility Community Care Staff	Manage referrals for their VA facility
Facility Clinical and Administrative Staff Members and Managers	Manage referrals for their VA facility
Customer Service Staff Members (Help Desk)	Provide technical support to HSRM users
Appeals Staff Members	Manage appeals
Claims Examiners	Examine and review claims
Audit Staff Members	Audit reports and collect data on various metrics
Financial Staff Members	Provide financial data on various metrics
Community Care Network Contractors	Manage referrals for their assigned network
Facility Revenue Technicians	Manage referral workflow and referrals requiring precertification
Facility Revenue Managers	Run reports on various metrics
Revenue Utilization Review (RUR) Nurses	Provide financial reports on utilization
RUR Managers	Manage RUR staff
Local VA Leadership	Run reports on various metrics
Pharmacy Staff Members	View referrals

4. HSRM Account Request

The HSRM Help Desk grants users access to HSRM. Users are assigned to a security group based on their role in the system. Each security group has different rights and privileges. A designee at each site sets up additional accounts and allocates additional access based on user roles and privileges. Community providers request access through ID.me. This information will be provided to community providers during implementation.

5. HSRM Access

Users can access HSRM through a single sign-on process.

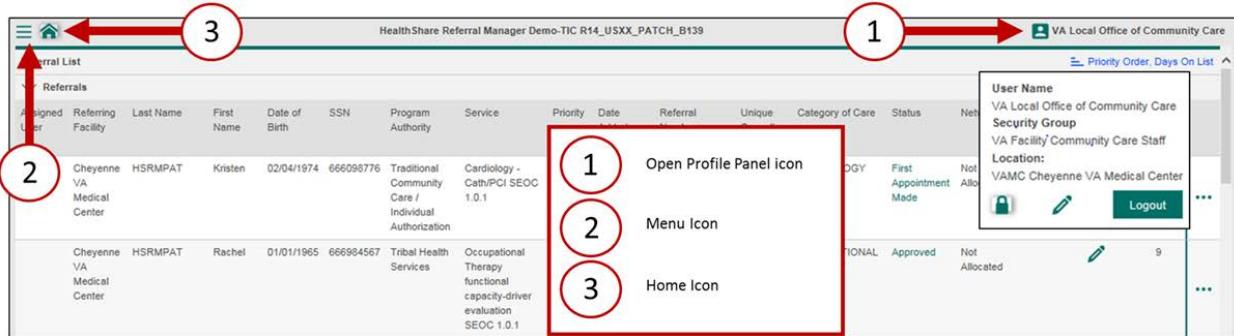
6. HSRM Essentials

This section describes the general HSRM functionality that is essential to navigating and utilizing HSRM.

6.1. HSRM Frame

The HSRM frame, shown in **Figure 2**, contains options available to users on any screen in HSRM.

Figure 2: HSRM Frame – Open Profile, Menu, and Home Icons



- **Open Profile Panel** icon

The **Open Profile Panel** icon allows users to view user profile information such as User Name, Security Group, and Location. The Lock icon and Logout button are within the Role Menu.

- **Lock** icon

The **Lock** icon allows users to save their location in HSRM for their next login.

- **Logout** button

The **Logout** button allows users to log out of HSRM. HSRM automatically logs users out of the system after 120 minutes of inactivity.

- **Menu** icon

The **Menu** icon allows users to find referrals, to find referrals by patient, to view a referral or task list, and more. Clicking the **Menu** icon populates a drop-down list with a list of the available options. Menu options are based on user security rights.

- **Home** icon

The **Home** icon allows users to quickly navigate back to the home page from any screen in HSRM. Click the **Home** icon to go back to the home page. The home page for all users is the **Referral List** page.

6.2. Patient Banner

The **Patient Banner** helps users remain aware of Veteran demographics while working in HSRM. Located at the top of various screens in HSRM, the **Patient Banner** displays patient details such as name, date of birth, age, gender, address, and phone number. It also has an **Action Menu** that allows users to add a task, view additional patient details and referral information, and perform other functions.

Figure 3: Referral Details Screen – Patient Banner

HSRMPAT, Rachel 01/01/1965 55 Yrs Female 666984567

Referral Details

*Referring Facility: Cheyenne VA Medical Center

*Referring Provider: Justin Gaines

*Priority: Routine

*Provisional Diagnosis: R51 Headache

*Referral Date: 05/31/2018

Clinically Indicated Date: 05/31/2018

Referral Expiration Date:

Referral Category: Outpatient

Level of Care: Moderate

Add Documents to Referral

Service Requested

Category of Care: OCCUPATIONAL THERAPY

*Service Requested: Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1

SEOC Details

Authority

*Program Authority: Tribal Health Services

Estimated Cost of Care: 0.00

Insurance Details

Payer: VA

Payer Status:

Apply Update

6.3. Breadcrumb Trail/Back Feature

The **Breadcrumb Trail** illustrates a user's path through HSRM and is used to navigate back to a previously accessed screen. The highlighted text on the **Breadcrumb Trail** drop-down list indicates the current screen displayed. Click an option within the drop-down list to return to the selected screen.

Figure 4: Referral Details Screen – Breadcrumb Trail

6.4. Mandatory Fields

Mandatory fields must be completed before any information on the screen can be saved. Mandatory fields are denoted by a red asterisk (*) and bold text. Some buttons and links remain inactive (grayed out) until all mandatory fields are complete.

Figure 5: Accept Task/Update Button Grayed Out



6.5. HSRM Icons

This section describes all HSRM icons.

- **Action Menu**

The **Action Menu** icon on the **Patient Banner** and on the referral row allows users to view the **Action Menu** options. Click the **Action Menu** icon to view more screens with information related to the referral or Veteran.

- **Ascending**

The **Ascending** icon allows users to sort columns in ascending order. Click the **Ascending** icon in the **Sort** menu to sort data in any list.

- **Calendar**

The **Calendar** icon allows users to select a date in fields requiring a date. Click the **Calendar** icon to select a date.

-  **Canned Text**

The **Canned Text** icon allows users to insert prewritten text. To populate a field with canned text, click the **Canned Text** icon in any free text field.

-  **Component Menu**

The **Component Menu** icon on the **Referral Details** screen allows users to view additional **Component Menu** options. Click the **Component Menu** icon to print an Offline Referral Form.

-  **Descending**

The **Descending** icon allows users to sort columns in descending order. Click the **Descending** icon in the **Sort** menu to sort data in any list.

-  **Download**

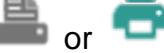
The **Download** icon allows users to download a report in Portable Document Format (PDF) to the computer. Click the **Download** icon to download the report as a PDF.

-  **Record Appointment**

The **Record Appointment** icon allows users to open the **Record Appointment** screen. Click the **Record Appointment** icon to view the **Record Appointment** screen.

-  **Magnifying Glass**

The **Magnifying Glass** icon allows users to view a list of available options for a specific field. Click the **Magnifying Glass** icon to view the list for a specific field.

-  or  **Print Preview**

The **Print Preview** icons allow users to open a PDF file of a report based on the specified criteria. Click a **Print Preview** icon to open the PDF file of the report.

-  **Save As**

The **Save As** icon allows users to save a report to the computer as a PDF file. Click the **Save As** icon to save the report.

6.6. Canned Text

Canned Text automatically populates text fields with predefined text string items. Canned Text functionally is available for most multi-lined text fields. Clicking the

Canned Text icon will display existing items in the canned text library. The following Canned Text shortcuts are available:

- Press the F8 key on a Windows or Mac keyboard to perform a lookup.
- Type a backslash character (\) and the full or partial code of the canned text to insert the canned text.

Figure 6: Referral Processing Information Section – Canned Text

The screenshot shows the 'Referral Processing Information' section of the HSRM interface. On the left, there are fields for Referral Number (VA0000000042), Status (Approved), Referral Return Reason (325_1465), and Unique Consult ID (Audit Trail). In the center, there's a table titled 'Interfaced from VA' with columns 'Code' and 'Desc'. A single row is visible: 'testsite' under 'Code' and 'test Site' under 'Desc'. This table is highlighted with a red box. To the right, there are sections for Assigned User (with a dropdown menu), Comments (empty), and various metadata fields like Date Added (04/18/2018), Update Date (04/18/2018), and Update User (Integration User). At the bottom right, it says 'Page 1'.

6.7. Calendar Dates

Date fields can be entered using the **Calendar** icon or by manually entering dates. HSRM provides the following shortcuts for manual date entry:

- T for today
- N for now
- 091516 for 15th of September 2016
- 18 for 18th of this month
- T+n for tomorrow, T-n for yesterday
- T+2 for day after tomorrow (T+7 is next week, T+14 is in 2 weeks' time)
- T-1 for 2 days ago, T-7 is last week, T-14 is 2 weeks ago
- 3m for three months from now, 3y for three years from now

6.8. Search Rules

The following rules are used in HSRM when searching for data:

- When values are entered for more than one search field, HSRM looks for records that match all fields. There is no “or” search available.
- The search is case-insensitive (e.g., there is no difference between Smith, smith, and SMITH).
- The search looks for names matching, or starting with, the value entered (e.g., entering Smith will return Smithson, but not Nesmith).

6.9. Save Data

Use the following save methods to save data in HSRM:

- **Apply** button: Saves data within fields and remains on the current screen

- **Update** button: Saves data within fields and returns to the previous screen

6.10. HSRM Keyboard Shortcuts

HSRM has a number of keyboard shortcuts for Windows and Mac. The most common shortcuts are listed in **Table 3** and **Table 4**.

Table 3: Windows Operating System (OS) Shortcut Keys

Shortcut Keys	Elements
Alt + 1	Main Menu
Alt + 2	Home
Alt + 3	Tools
Alt + 6	User Details
Alt + M => (component menu #)	Component Menu
Alt + Page Up/ Down	Navigation of List Pages
Alt + B	Back on Breadcrumbs
Alt + R	Sort Menu
Alt + L	Lists
Alt + L => 1	When Visible: List Column Header
Alt + L => 1 => (1-9, A-Z)	When Visible: Select All, Sort Columns, Column Header Links/Icons
Alt + L => (1-9, A-Z)	List Rows
Alt + L => (1-9, A-Z) => (1-9, A-Z)	Links, Nested Toggles, Icons, and Action Menu
Alt + Down Arrow	Section Headers/Chart Item Headers
Alt + S	Select Mode Toggle
Alt + S => L => (1-9, A-Z)	Row Select Checkbox
Alt + U	Update (when Update button is available onscreen)
Alt + F	Find (when Find button is available onscreen)
Alt + N	New (when New button is available onscreen)
Alt + A	Apply (when Apply button is available onscreen)
Up/Down Arrows when in List Row	Navigation of List
Page Up/Down when in List Row	Navigation of List Pages
Up/Down Arrows when in Lookup	Navigation of Lookup

Shortcut Keys	Elements
Page Up/Down when in Lookup	Navigation of Lookup Pages
Tab	Navigate Forward for Fields
Shift + Tab	Navigate Backward for Fields
Spacebar or Enter	Use to Tick or Untick a Checkbox when in that Field

Table 4: Mac OS Shortcut Keys

Shortcut Keys	Elements
Alt + 1	Main Menu
Alt + 2	Home
Alt + 3	Tools
Alt + 6	User Details
Alt + M => (component menu #)	Component Menu
Alt + (Fn + Arrow Up/Down)	Navigation of List Pages
Alt + B	Back on Breadcrumbs
Alt + R	Sort Menu
Alt + L	Lists
Alt + L => 1	When Visible: List Column Header
Alt + L => 1 => (1-9, A-Z)	When Visible: Select All, Sort Columns, Column Header Links/Icons
Alt + L => (1-9, A-Z)	List Rows
Alt + L => (1-9, A-Z) => (1-9, A-Z)	Links, Nested Toggles, Icons, and Action Menu
Alt + Down Arrow	Section Headers/Chart Item Headers
Alt + S	Select Mode Toggle
Alt + S => L => (1-9, A-Z)	Row Select Checkbox
Alt + U	Update (when Update button is available onscreen)
Alt + F	Find (when Find button is available onscreen)
Alt + N	New (when New button is available onscreen)
Alt + A	Apply (when Apply button is available onscreen)
Up/Down Arrows when in List Row	Navigation of List

Shortcut Keys	Elements
Fn + Arrow Up/Down when in List Row	Navigation of List Pages
Up/Down Arrows when in lookup	Navigation of Lookup
Fn + Arrow Up/Down when in lookup	Navigation of Lookup Pages
Tab	Navigate Forward for Fields
Shift + Tab	Navigate Backward for Fields
Spacebar or Enter	Use to Tick or Untick a Checkbox when in that Field

7. Receive a Referral

The consult is initiated in CPRS and authorized in Consult Toolbox. It is sent to HSRM as a referral in the Approved status once the Send to HSRM for Referral box has been checked. This is the only way a referral can enter HSRM.

Figure 7: Consult Toolbox – Send to HSRM for Referral

Authorization instructions to be included with Referral:

Specialty: Other: Additional SEOCS

SubSpecialty: Category of Care:

Service/Care Requested: SEOCS:

Service Type:

Timeframe for episode of care not to exceed: months

Authorize total of visit(s)

Care must be completed by:

Include Standard Authorization Language

Add the following to authorization:
Any additional treatments, procedures or referrals must have a Secondary Authorization Request submitted

Community Care Manager:
For questions, contact this number:

Upon completion of this section: Send to HSRM for Referral

8. View Other Health Insurance (OHI)

The **Other Heath Insurance** screen displays insurance information for a Veteran.

To view the **Other Health Insurance** screen:

1. [Locate the referral](#) and navigate to the **Referral Details**.
2. Click the **Action Menu** icon at the top right of the **Patient Banner** to access the **Action Menu** drop-down list.

Figure 8: Action Menu Icon

The screenshot shows the 'Referral Details' section of the HealthShare Referral Manager. At the top right of the main content area, there is a small blue square icon with three white dots, which is the 'Action Menu' icon. The screen displays patient information: HSRMPA, Back to: Task List, 03/07/1982, 36 Yrs, Female, 666955678. Below this, under 'Referral Details', are fields for Referring Facility (Cheyenne VA Medical Center), Referring Provider (MCCARTY, KRISTEN), Priority (STAT (Urgent)), Provisional Diagnosis (R51 Headache), Referral Date (06/12/2018), Clinically Indicated Date (06/12/2018), Referral Category (Outpatient), Level of Care Coordination (Basic), and Referral Expiration Date (08/11/2018). A 'Task List' button is also visible.

Figure 9: Referral Details Screen – Action Menu List

This screenshot shows the same 'Referral Details' screen as Figure 8, but with the 'Action Menu' list open on the right side. The 'Additional Referral Information' section is expanded, revealing a dropdown menu with several options: 'Add Task', 'Patient Details', 'Additional Referral Information', 'Other Health Insurance' (which is highlighted with a red box), and 'Eligibility'. The rest of the screen remains the same, showing patient details and referral information.

3. Select **Other Health Insurance** from the drop-down menu. The **Other Health Insurance** screen appears.

Figure 10: Other Health Insurance Screen

This screenshot shows the 'Other Health Insurance' screen. The top banner includes the patient information: HSRMPAT, Thao, 04/16/1963, 55 Yrs, Female, 666111254. Below this is a 'Payer List' table with columns for Payer, Date Valid From, Date Valid To, Cardholder Name, and Card Number. A link 'Date Valid From' is located above the table. The table body contains the message 'No matches found'.

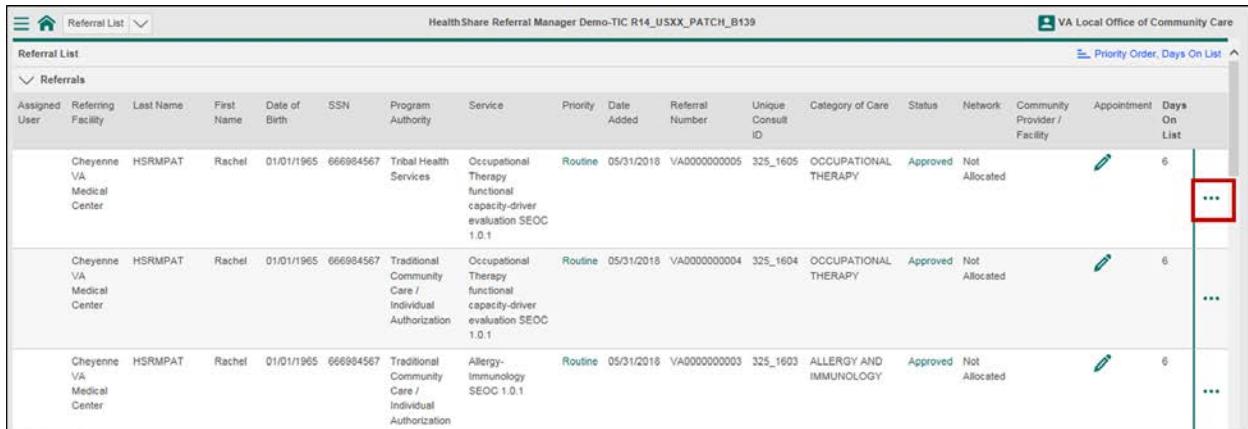
9. View Eligibility Form

The **Eligibility Form** screen displays Veteran enrollment and eligibility data from the Eligibility System, which confirms that the Veteran is currently enrolled in the VA and provides other details, including their service-connected conditions. The **Eligibility Form** is a read-only form.

To view the **Eligibility Form** screen:

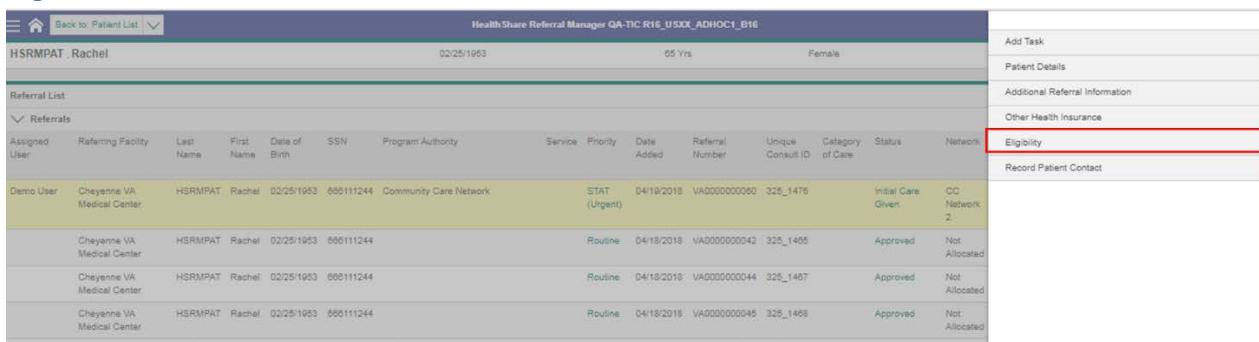
1. [Navigate to the Referral List.](#)
2. Click the **Action Menu** icon to the right of the referral to view the **Action Menu** drop-down list.

Figure 11: Referral List – Action Menu Icon



HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																	
VA Local Office of Community Care																	
Priority Order, Days On List																	
Referral List																	
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	...
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	...
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated			6	...

Figure 12: Referral List – Menu List



HealthShare Referral Manager QA-TIC R16_USXX_ADI0C1_B16																
HSRMPAT , Rachel																
02/25/1963 65 Yrs Female																
Referral List																
Referrals																
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Action Menu	
Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	666111244	Community Care Network	STAT (Urgent)	04/19/2018	VA0000000060	325_1476	Initial Care Given	CC Network 2			Add Task	
Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	666111244			Routine	04/18/2018	VA0000000042	325_1495	Approved	Not Allocated			Patient Details	
Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	666111244			Routine	04/18/2018	VA0000000044	325_1487	Approved	Not Allocated			Additional Referral Information	
Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	666111244			Routine	04/18/2018	VA0000000045	325_1469	Approved	Not Allocated			Other Health Insurance	
															Eligibility	
															Record Patient Contact	

3. Select **Eligibility** from the drop-down menu and the **Eligibility Form** screen appears.

Figure 13: Eligibility Form

The screenshot shows the 'Eligibility Information' section of the HSRM application. It lists numerous fields related to military and environmental exposure, each with a corresponding input field. The fields include: Eligibility - Priority Enrollment Group, Eligibility - Current Means Test, Eligibility - Agent Orange Exposure Indicator, Eligibility - Combat Veteran Eligibility Indicator, Eligibility - Combat Veteran End Date, Eligibility - Project 112 SHAD Indicator, Eligibility - Southwest Asian Indicator, Eligibility - Ionizing Radiation Indicator, Eligibility - Camp Lejeune Indicator, Eligibility - Military Sexual Trauma - Determination Facility, Eligibility - Military Sexual Trauma - Status, Eligibility - Military Sexual Trauma - statusChangeDate, Eligibility - Nose/Throat Radium Info - Determination Facility, Eligibility - Nose/Throat Radium Info - Diagnosed with Cancer Indicator, Eligibility - Nose/Throat Radium Info - Diagnosis Verification Date, and Eligibility - Nose/Throat Radium Info - From Aviator Service before. At the bottom right of the form are 'Apply' and 'Update' buttons.

10. Locate a Referral

Most workflows in HSRM start with locating a referral. A referral can be located using the following methods:

- [Find Referral by Patient](#) (not available to community providers)
- [Find Referrals](#) (not available to community providers)
- [Referral List](#)

10.1. Find Referral by Patient

Locating a referral using the **Find Referral by Patient** option allows users to locate a referral using personally identifiable information. To locate a referral using the **Find Referral by Patient** method:

1. Click the **Menu** icon at the top left of any screen to view the menu options available.



Note: Menu options are based on user security rights.

Figure 14: Menu Options – Find Referral by Patient

The screenshot shows the HealthShare Referral Manager interface. On the left, there is a vertical navigation menu with the following items:

- Find Referral by Patient (highlighted with a red box)
- Find Referrals
- Find Provider
- Referral List
- Task List
- External Search
- Reports
- Tools

The main content area displays a table of referrals. The columns include:

Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List	
tachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	...
tachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	...
tachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated			6	...

2. Select **Find Referral by Patient** from the drop-down options to navigate to the **Patient Search** screen.
3. Enter search criteria in any field on the **Patient Search** screen.



Notes:

- When values are entered for more than one field, HSRM looks for records that match all fields. There is no “or” search available.
- The search is case-insensitive (e.g., there is no difference between Smith, smith, and SMITH).
- The search looks for names matching, or starting with, the value entered (e.g., entering Smith will return Smithson, but not Nesmith).

4. Click the **Find** button at the bottom right of the screen to view the list of Veterans who match the search. The resulting **Referral List** screen lists referrals that match the search criteria.

Figure 15: Patient Search Screen – Find Button

The screenshot shows the 'Patient Search' interface of the HealthShare Referral Manager. At the top, there are dropdown menus for 'Find Referral by Patient' and 'VA Local Office of Community Care'. Below these are sections for entering patient information: 'Last Name', 'First Name', 'Middle Name', 'Gender', 'Date of Birth' (with a calendar icon), 'SSN', 'ICN', and 'EDIPI'. A magnifying glass icon is positioned between the middle name and gender fields. At the bottom right of the search area, there is a green 'Find' button.

5. Locate the Veteran by sorting the list if multiple Veterans are listed (e.g., Last Name, First Name).
6. Click the row of the patient to view the Veteran's referral list.
7. Click the row of the referral to view the referral details.



*Note: The information within the **Priority**, **Status**, and **Appointment** columns are hyperlinks. These columns do not navigate to the **Referral Details** screen.*

- Click the **Priority** hyperlink to view historical changes to the priority of the referral.
- Click the **Status** hyperlink to view historical changes to the status of the referral.
- Click the **Appointment** hyperlinks to record and edit appointments.

10.2. Find Referrals

Locating a referral using the **Find Referrals** option allows users to search for a referral using multiple criteria related to the referral details. To locate a referral using the **Find Referrals** method:

1. Click the **Menu** icon at the top left of any screen to view the menu options available.
-
- Note: Menu options are based on user security rights.*
2. Select **Find Referrals** from the drop-down options to navigate to the **Inquiry Selection** screen.

Figure 16: Referral List Screen – Find Referrals

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139														VA Local Office of Community Care
														Priority Order, Days On List
First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment Date	Days On List
Search	Rachel	01/01/1985	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated		6
Find Referral by Patient														...
Find Referrals														...
Find Provider														...
Referral List	Rachel	01/01/1985	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated		6
Task List														...
External Search														...
Reports	Rachel	01/01/1985	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated		6
Tools														...

3. Enter information in any field within the **Inquiry Selection** screen.



Note: It is possible to select multiple community care providers/facilities and statuses to perform the search. To remove a selection, click the X next to the item.

4. Click the **Find** button at the bottom right of the screen. The resulting **Referral List** screen lists referrals that match the search criteria.



Notes:

- When values are entered for more than one field, HSRM looks for records that match all fields. There is no “or” search available.
- The search is case-insensitive (e.g., there is no difference between Smith, smith, and SMITH).
- The search looks for numbers matching, or starting with, the value entered (e.g., entering 325 will return 325-000, but not 000-325).

Figure 17: Inquiry Selection Screen

5. Locate the referral by [sorting the list](#) if multiple Veterans are listed (e.g., Last Name, First Name).
6. Click the row of the patient to view the Veteran's referral list.
7. Click the row of the referral to view the **Referral Details** screen.



*Note: The information within the **Priority**, **Status**, and **Appointment** columns are hyperlinks. These hyperlinks do not navigate to the **Referral Details** screen.*

- Click the **Priority** hyperlink to view historical changes to the priority of the referral.
- Click the **Status** hyperlink to view historical changes to the status of the referral.
- Click the **Appointment** hyperlinks to record and edit appointments.

10.3. Referral List

The **Referral List** option allows users to find a referral by providing a list of referrals specific to their facility; this is considered a work queue. The **Referral List** is the home screen for most users. To locate a referral using the **Referral List** method:

1. Click the **Menu** icon in the top left of any screen to view the menu options available.
2. Select **Referral List** from the drop-down options to navigate to the **Referral List** screen.
3. Locate the referral by [sorting the list](#) (e.g., Last Name, First Name).

- Click the row of the referral to view the **Referral Details** screen.



*Note: The information within the **Priority**, **Status**, and **Appointment** columns are hyperlinks. These columns do not navigate to the **Referral Details** screen.*

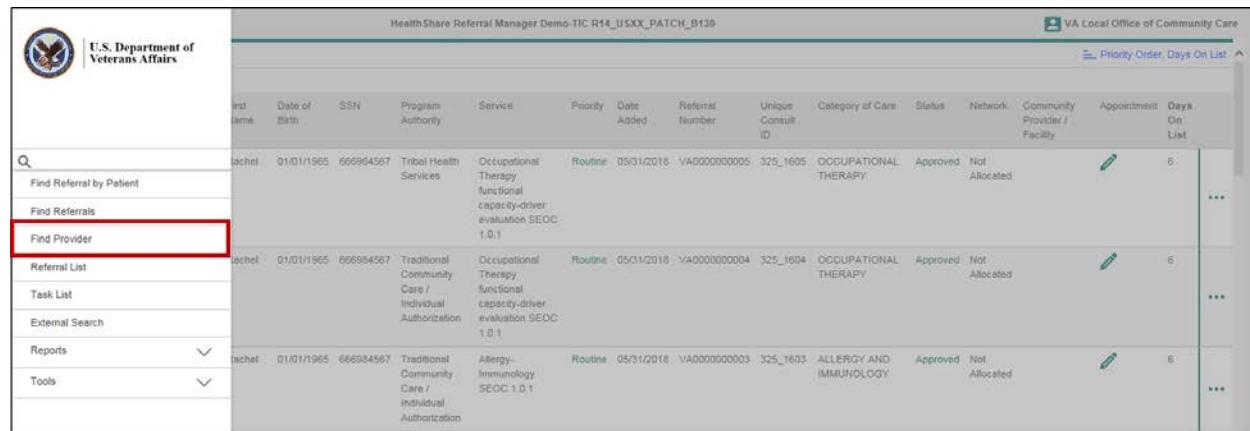
- Click the **Priority** hyperlink to view historical changes to the priority of the referral.
- Click the **Status** hyperlink to view historical changes to the status of the referral.
- Click the **Appointment** hyperlinks to record and edit appointments.

11. Locate a Provider

A user can locate a provider in HSRM using the **Find Provider** option in the menu or by using the link on the [Referral Details](#) screen or [Record Appointment](#) screen. To locate a provider:

- Click the **Menu** icon at the top left of any screen to view the menu options available.
- Select **Find Provider** from the drop-down options to navigate to the **Find Provider** screen.

Figure 18: Find Provider – Menu List



HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139														VA Local Office of Community Care
First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy, functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2016	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Find Referral by Patient														
Find Referrals														
Find Provider														
Referral List														
Task List														
External Search														
Reports														
Tools														

- Enter search criteria in any field on the **Find Provider** screen.
- Click the **Find** button at the bottom right of the screen to view a list of providers that match the search.

Figure 19: Provider Search Screen

The screenshot shows the 'Provider Search' interface. At the top, there are search filters for 'Facility', 'State', 'City', and 'Affiliation'. Below these, the 'Specialty' field is populated with 'Addiction Medicine' and has a red box around it. The 'Last Name' field contains 'palmer' and also has a red box around it. To the right of these fields are 'Care Provider Code', 'First Name', and 'ZIP Code' input fields. A table below lists a single provider entry: St. Mary's Hospital (PA) as the Facility, St. Mary's Hospital as the Care Site, DAVID PALMER (PA) as the Care Provider, 102 Campus Avenue as the Address, LEWISTON as the City, Maine as the State, 04240 as the ZIP Code, 207-753-4554 as the Telephone, and campus@stmarys.com as the Email. At the bottom right of the search results area, the 'Find' button is highlighted with a red box.

- Click the row with the provider to view the **Main Details** screen.

Figure 20: Main Details Screen

The screenshot shows the 'Main Details' screen for provider 1194016774. The form includes fields for 'Code' (1194016774), 'Description' (AARON A LAVIANA), 'Date From' (01/01/2000), 'Date To' (empty), 'Title' (LAVIANA), 'Surname' (LAVIANA), 'First Name' (AARON), and 'Other Name' (A). To the right of the form are fields for 'SMC Number' and 'Prescriber Number', both of which are empty. At the bottom right of the screen, there are 'Apply' and 'Update' buttons, with the 'Update' button highlighted with a red box.

12. Assign a Referral to a Facility Community Care Staff Member

In HSRM, a referral can be assigned to a facility community care staff member at a VA facility. Each VA facility can determine how they want to use this feature by self-assigning or by having a supervisor or designee assign a referral to staff. This is optional and is visible only to VA users, not to community providers. To assign a referral to a facility community care staff member:

1. [Locate the referral](#).
2. Navigate to the **Referral Processing Information** section and click the **Magnifying Glass** icon to select a user.
3. Click the **Update** button at the bottom right of the screen to save changes.

Figure 21: Referral Details Screen – Assigned User

The screenshot shows the 'Referral Details' screen for a patient named HSRMPAT . Rachel. The top banner displays the patient's name, birth date (01/01/1965), age (53 Yrs), gender (Female), and ID (666984567). The 'VA Local Office of Community Care' is selected as the care location. The 'Assigned User' field is highlighted with a red box and contains the value 'Amy VanEpes'. Other fields visible include Payer (VA), Referral Number (VA0000000003), Status (Approved), Source of Referral (Interfaced from VA), Date Added (05/31/2018), and various audit and tracking details.

13. Generate an Offline Referral Form

The **Offline Referral Form** pulls referral details, additional referral information, patient details, and [Standardized Episode of Care \(SEOC\)](#) details into one form that can be printed. This form is used to send a referral to a community provider who, for one reason or another, is not using HSRM. All **Offline Referral Forms** must be sent as secure, encrypted files.

To generate an **Offline Referral Form**:

1. [Locate the referral](#) and navigate to the **Referral Details** screen.
2. Click the **Component Menu** icon, displayed as the vertical three-dot ellipsis on the right side of the **Referral Details** header, below the **Patient Banner**.

Figure 22: Referral Details Screen – Component Menu Icon

The screenshot shows the Referral Details screen. At the top right, there is a vertical ellipsis menu icon (three dots) enclosed in a red box. The main interface displays various referral details such as Referring Facility (Cheyenne VA Medical Center), Referring Provider (Justin Gaines), Priority (Routine), Provisional Diagnosis (R51 Headache), Referral Date (05/31/2018), Clinically Indicated Date (05/31/2018), Referral Category (Outpatient), Level of Care Coordination (Moderate), and Referral Expiration Date. Below these fields are sections for Service Requested (Category of Care: OCCUPATIONAL THERAPY, Service Requested: Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1), Authority (Program Authority: Tribal Health Services), and Insurance Details (Payer: VA). At the bottom right are 'Apply' and 'Update' buttons.

- Click the down arrow to expand the print section and select **Offline Referral Form**. The Offline Referral Form appears in a new browser tab.

Figure 23: Referral Details Screen – Offline Referral Form

This screenshot shows the same Referral Details screen as Figure 22, but with a red box highlighting the 'Print' dropdown menu in the top right corner. The 'Offline Referral Form' option is selected. The rest of the screen displays the same referral information and sections as Figure 22.

Figure 24: Offline Referral Form

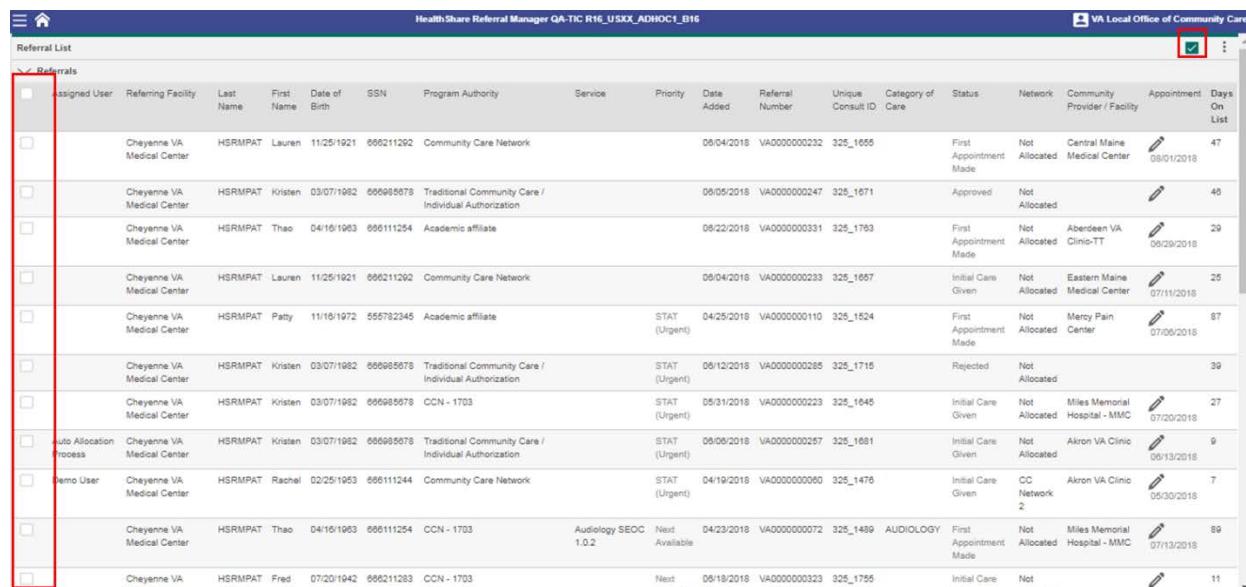
  U.S. Department of Veterans Affairs	VHA Approved Referral for Medical Care
Veteran Name: HSRMPAT Rachel Veteran ICN: 5000002786V903488 Veteran EDIPI: 101077 Veteran Date of Birth: 1965-01-01 Veteran Address: Veteran Phone Number:	Referral Number: VA0000000003 Priority: Routine Referral Category: Outpatient Referral Issue Date: 2018-05-31 Expiration Date: 2018-11-28 First Appointment Date: 2018-06-05
REFER ALL QUESTIONS RELATED TO THIS APPROVAL TO THE ISSUING VA OFFICE	
Referring VA Facility: Cheyenne VA Medical Center Station Number: 442	

13.1. Generate Multiple Offline Referral Forms

Users can also compile multiple referrals into one offline referral form from any referral list (e.g., a facility's list or a Veteran's individual referral list).

1. Navigate to the **Referral List Screen** or an individual Veteran's **Referral List**.

Figure 25: Referral List Screen – Multiple Offline Referral Form Checkbox



HealthShare Referral Manager QA-TIC R16_USXX_ADIHOC1_B16															VA Local Office of Community Care		
Referral List		Referrals															
	Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment Days On List
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211262	Community Care Network		08/04/2018	VA0000000232	325_1655		First Appointment Made	Not Allocated	Central Maine Medical Center	 47	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	Traditional Community Care / Individual Authorization		08/05/2018	VA0000000247	325_1671		Approved	Not Allocated		48	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1963	666111254	Academic affiliate		08/22/2018	VA0000000331	325_1763		First Appointment Made	Not Allocated	Aberdeen VA Clinic-TT	 29	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211262	Community Care Network		08/04/2018	VA0000000233	325_1657		Initial Care Given	Not Allocated	Eastern Maine Medical Center	 25	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Patty	11/16/1972	555782345	Academic affiliate	STAT (Urgent)	04/25/2018	VA0000000110	325_1524		First Appointment Made	Not Allocated	Mercy Pain Center	 87	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	Traditional Community Care / Individual Authorization	STAT (Urgent)	08/12/2018	VA0000000285	325_1715		Rejected	Not Allocated		39	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	CCN - 1703	STAT (Urgent)	08/31/2018	VA0000000223	325_1845		Initial Care Given	Net Allocated	Miles Memorial Hospital - MMC	 27	
<input type="checkbox"/>	Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	Traditional Community Care / Individual Authorization	STAT (Urgent)	08/08/2018	VA0000000267	325_1681		Initial Care Given	Not Allocated	Akron VA Clinic	 9	
<input type="checkbox"/>	Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1953	666111244	Community Care Network	STAT (Urgent)	04/19/2018	VA0000000050	325_1476		Initial Care Given	CC Network 2	Akron VA Clinic	 7	
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1963	666111254	CCN - 1703	Audiology SEOC 1.0.2	Ned Available	04/23/2018	VA0000000072	325_1499	AUDIOLOGY	First Appointment Made	Not Allocated	Miles Memorial Hospital - MMC	 89
<input type="checkbox"/>		Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	666211283	CCN - 1703		Next Available	08/18/2018	VA0000000323	325_1755		Initial Care Given	Not Allocated		11

2. Click the **Toggle Multiple Selection** checkbox (at the top right) to enable the option to select multiple referrals.

Figure 26: Referral List Screen – Component Menu

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status
Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211292		Community Care Network			06/04/2018	VA0000000232	325_1655		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		Traditional Community Care / Individual Authorization			06/05/2018	VA0000000247	325_1671		Approved
Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	666111254		Academic affiliate			06/22/2018	VA0000000331	325_1783		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211292		Community Care Network			06/04/2018	VA0000000233	325_1657		Initial Care Given
Cheyenne VA Medical Center	HSRMPAT	Patty	11/16/1972	555782345		Academic affiliate		STAT (Urgent)	04/26/2018	VA0000000110	325_1524		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		Traditional Community Care / Individual Authorization		STAT (Urgent)	06/12/2018	VA0000000285	325_1710		Rejected
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		CCN - 1703		STAT (Urgent)	05/31/2018	VA0000000223	325_1646		Initial Care Given
Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/06/2018	VA0000000267	325_1681		Initial Care Given
Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1983	666111244	Community Care Network		STAT (Urgent)	04/19/2018	VA0000000080	325_1476		Initial Care Given
Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	666111254		CCN - 1703	Audiology SEOC 1.0.2	Need Available	04/23/2018	VA0000000072	325_1489	AUDIOLOGY	First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	666211203		CCN - 1703		Need Available	05/18/2018	VA0000000323	325_1755		Initial Care Given

- Click the checkboxes next to the referrals for which you want to generate offline referral forms, then click the **Component Menu** icon ⋮.



Note: The compiled offline referral forms will contain a cover page.

Figure 27: Referral List Screen – Component Menu

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status
Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211292		Community Care Network			06/04/2018	VA0000000232	325_1655		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		Traditional Community Care / Individual Authorization			06/05/2018	VA0000000247	325_1671		Approved
Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	666111254		Academic affiliate			06/22/2018	VA0000000331	325_1783		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	666211292		Community Care Network			06/04/2018	VA0000000233	325_1657		Initial Care Given
Cheyenne VA Medical Center	HSRMPAT	Patty	11/16/1972	555782345		Academic affiliate		STAT (Urgent)	04/26/2018	VA0000000110	325_1524		First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		Traditional Community Care / Individual Authorization		STAT (Urgent)	06/12/2018	VA0000000285	325_1710		Rejected
Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678		CCN - 1703		STAT (Urgent)	05/31/2018	VA0000000223	325_1646		Initial Care Given
Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	666985678	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/05/2018	VA0000000267	325_1681		Initial Care Given
Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1983	666111244	Community Care Network		STAT (Urgent)	04/19/2018	VA0000000080	325_1476		Initial Care Given
Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	666111254		CCN - 1703	Audiology SEOC 1.0.2	Need Available	04/23/2018	VA0000000072	325_1489	AUDIOLOGY	First Appoint Made
Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	666211203		CCN - 1703		Need Available	05/18/2018	VA0000000323	325_1755		Initial Care Given

- Click the down arrow to expand the print section and select **Selected Offline Referral Forms**. The referrals appear as one document in a new browser tab.

Figure 28: Multiple Offline Referral Forms Document

Veteran Approved Referrals for Medical Care Cover Page					
Veteran Name	Referral No	Referral Date	VA Facility	Category of Care	Community Provider/Facility
HSRMPAT Lauren	VA0000000232	2018-06-04	Cheyenne VA Medic al Center		Central Maine Medic al Center
HSRMPAT Kristen	VA0000000247	2018-06-05	Cheyenne VA Medic al Center		
HSRMPAT Thao	VA0000000331	2018-06-22	Cheyenne VA Medic al Center		Aberdeen VA Clinic -TT

13.2. Print an Offline Referral Form

The **Offline Referral Form** (or multiple offline referral forms) can be printed. This section provides instructions for printing in Google Chrome and Internet Explorer Web browsers.

13.2.1. Print an Offline Referral Form in Chrome

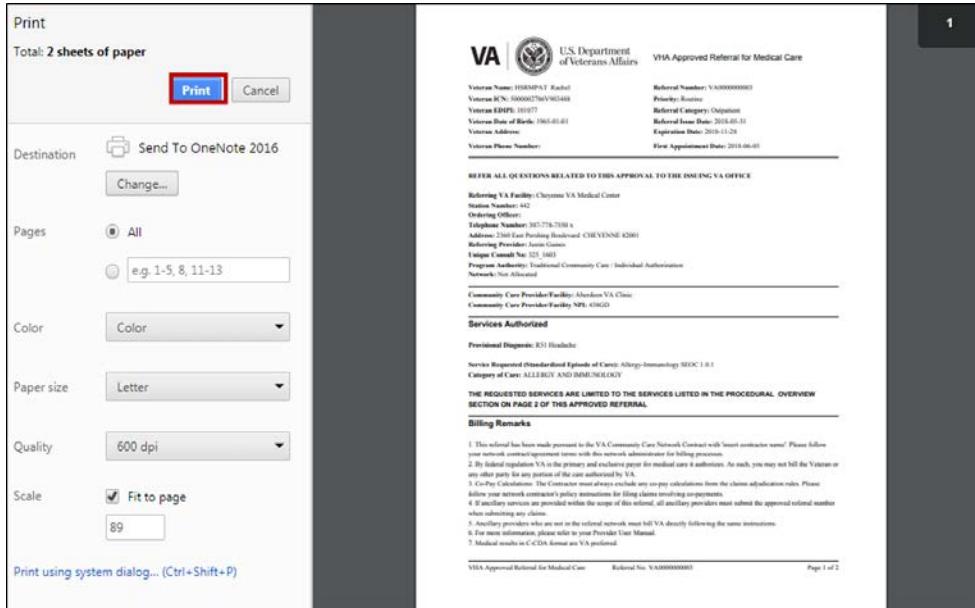
1. Navigate to the [**Offline Referral Form**](#).
2. Click the **Print** icon in the top right of the **Offline Referral Form**. The **Print** window appears.

Figure 29: Offline Referral Form in Chrome – Print Icon



3. Select print preferences from the print options listed.
4. Click the **Print** button.

Figure 30: Print Screen in Chrome – Print Button



13.2.2. Print an Offline Referral Form in Internet Explorer

1. Navigate to the [Offline Referral Form](#).
2. Click the **Print File** icon on the bottom of the **Offline Referral Form**. The **Print** window appears.

Figure 31: Offline Referral Form in Explorer – Print Icon

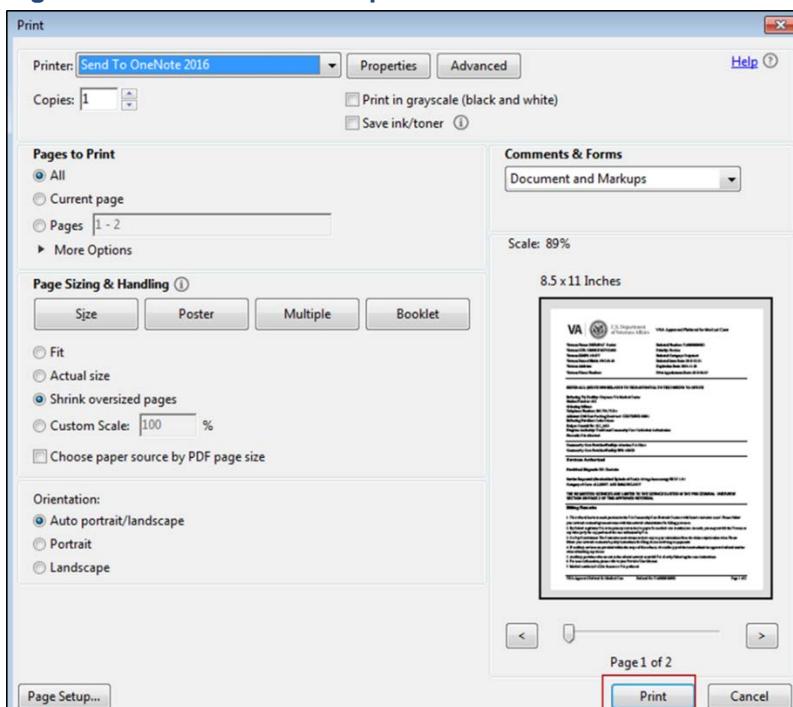
The screenshot shows the Offline Referral Form in Internet Explorer. At the top left is the VA logo. Next to it is the text "U.S. Department of Veterans Affairs". To the right is the title "VHA Approved Referral for Medical Care". Below this, there are two columns of information:

Veteran Name:	Referral Number:
HSRMPAT Rachel	VA0000000003
Veteran ICN:	Priority:
5000002786V903488	Routine
Veteran EDIPI:	Referral Category:
101077	Outpatient
Veteran Date of Birth:	Referral Issue Date:
1965-01-01	2018-05-31
Veteran Address:	Expiration Date:
	2018-11-28
Veteran Phone Number:	First Appointment Date:
	2018-06-05

Below the information is a section titled "REFER ALL QUESTIONS RELATED TO THIS APPROVAL TO THE ISSUING VA OFFICE". It contains fields for "Referring VA Facility" (Cheyenne VA Medical Center) and "Station Number" (442). A red box highlights the "Print" icon (a printer symbol) in the toolbar below these fields.

3. Select print preferences from the print options listed.
4. Click the **Print** button.

Figure 32: Print Screen in Explorer – Print Button



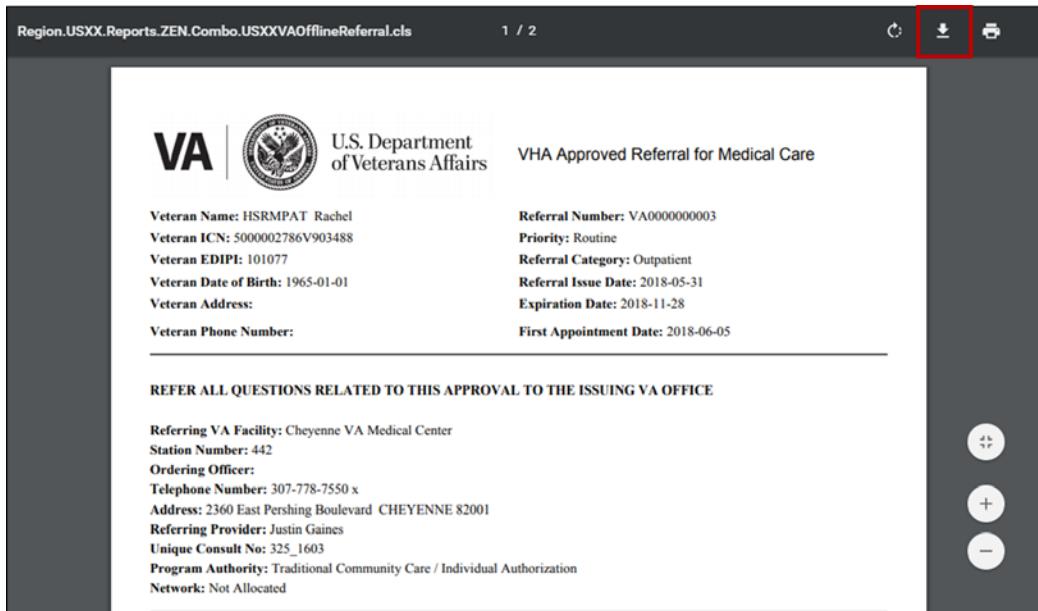
13.3. Download an Offline Referral Form

The **Offline Referral Form** can be downloaded and saved to your computer. This section provides instructions for downloading in Google Chrome and Internet Explorer Web browsers.

13.3.1. Download an Offline Referral Form in Chrome

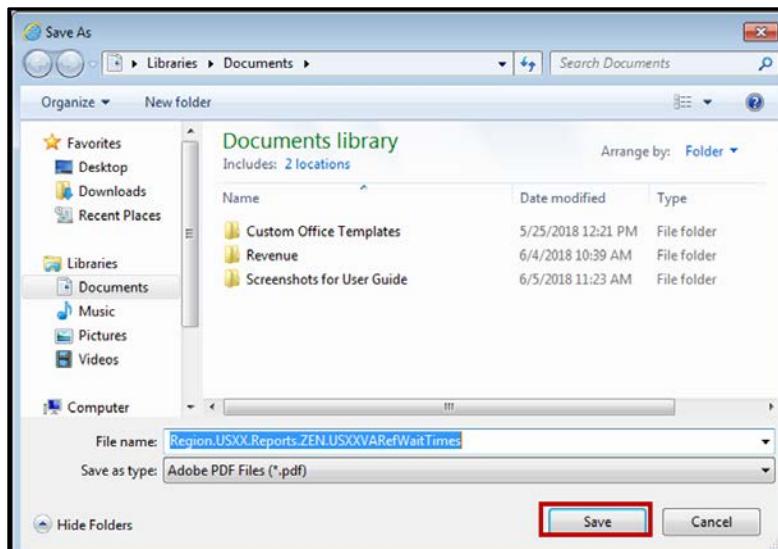
1. Click the **Download** icon in the top right of the **Offline Referral Form**. The **Save As** window appears.

Figure 33: Offline Referral Form in Chrome – Download Icon



2. Input a file name and click the **Save** button.

Figure 34: Save As Window in Chrome – Save Button



13.3.2. Download an Offline Referral Form in Explorer

1. Click the **Save a Copy** icon on the bottom of the **Offline Referral Form**. The **Save As** window appears.

Figure 35: Offline Referral Form in Explorer

Veteran Name: HSRMPAT Rachel
Veteran ICN: 5000002786V903488
Veteran EDIPI: 101077
Veteran Date of Birth: 1965-01-01
Veteran Address:
Veteran Phone Number:

Referral Number: VA0000000003
Priority: Routine
Referral Category: Outpatient
Referral Issue Date: 2018-05-31
Expiration Date: 2018-11-28
First Appointment Date: 2018-06-05

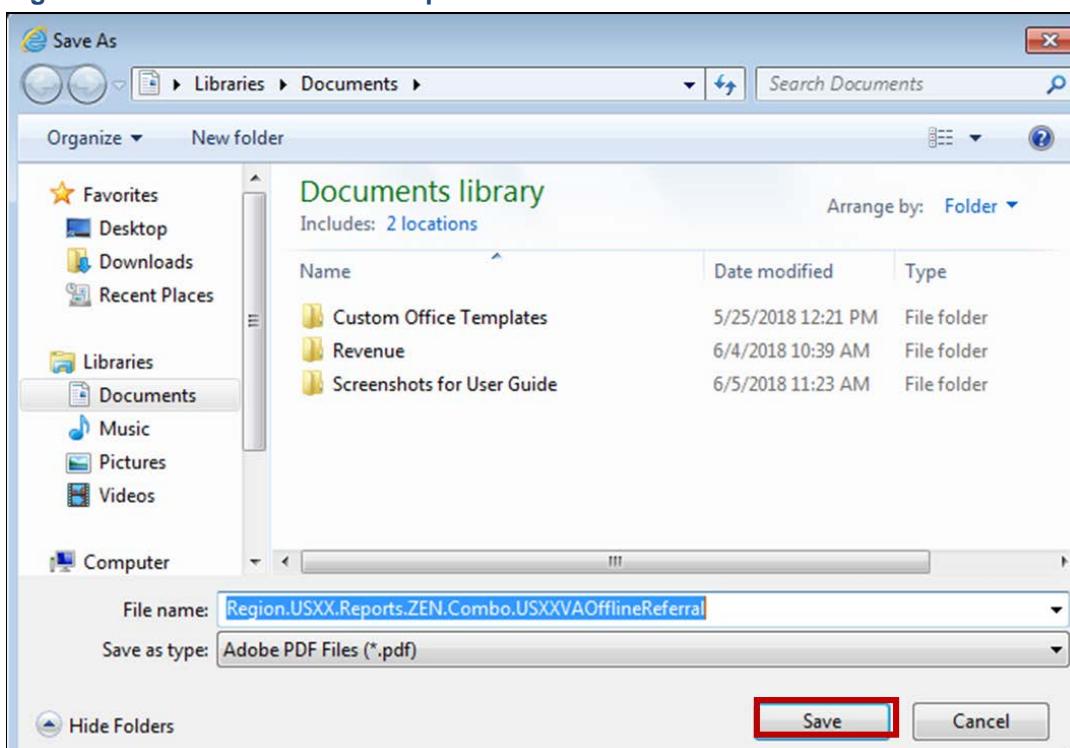
REFER ALL QUESTIONS RELATED TO THIS APPROVAL TO THE ISSUING VA OFFICE

Referring VA Facility: Cheyenne VA Medical Center | | 1 (1 of 2) | | |

Station Number: 442

2. Input a file name and click the **Save** button.

Figure 36: Save As Window in Explorer – Save Button



14. Sort a List

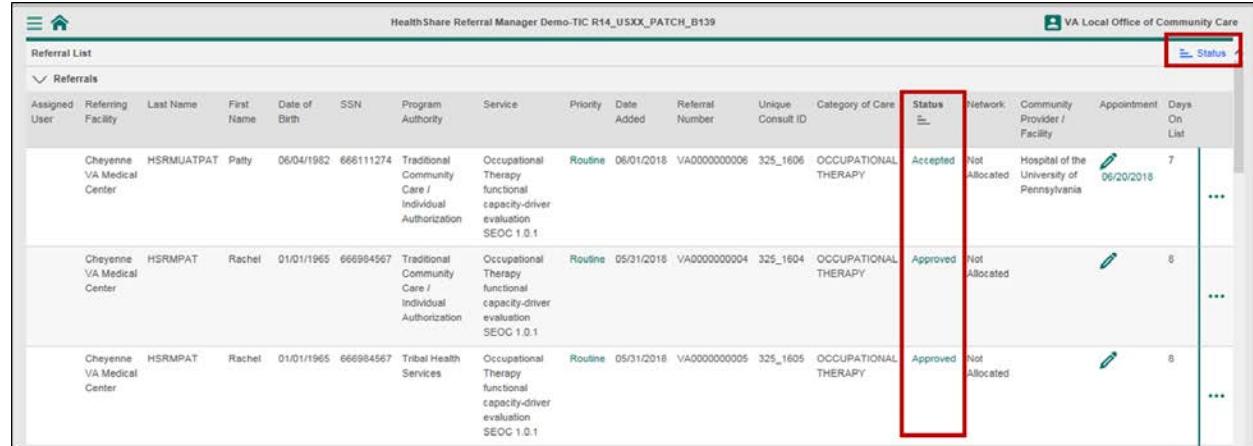
Sorting a list allows users to view the information in any column in ascending or descending order. All lists in HSRM can be sorted by the column heading or by the advanced sort function.

To sort the information by column heading: Click the column heading associated with each column to sort the data in ascending or descending order.

To conduct an advanced sort:

1. Click the blue hyperlink in the top right of the screen to sort by preferred column heading.

Figure 37: Referral List Screen – Status



HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139													
Referral List													
Referrals													
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status
Cheyenne VA Medical Center	HSRMUATPAT	Patty		06/04/1982	6669911274	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	06/01/2018	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Accepted
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666994567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666994567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved

2. Click the **Ascending** or **Descending** icons to select a primary sort category. Add a secondary sort category by clicking the preferred column heading.

Figure 38: Referral List Screen – Sorting Options



HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139													
Referral List													
Referrals													
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666994567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666994567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666994567	Allergy-immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	
Cheyenne VA Medical Center	HSRMPAT	Patty		10/13/1959	6669911567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved
Cheyenne VA Medical	HSRMUATPAT	Patty		06/04/1982	6669911274	Traditional Community Care /	Occupational Therapy functional	Routine	06/01/2018	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Rejected



Note: If an HSRM user selects Requesting Facility (ascending) as the primary sorting criterion and Patient Last Name (descending) as the secondary sorting criterion, the referral list displays each requesting facility in order of A through Z. If the requesting facility is the same, patients display in order of their last name from Z through A.

15. Manage Tasks

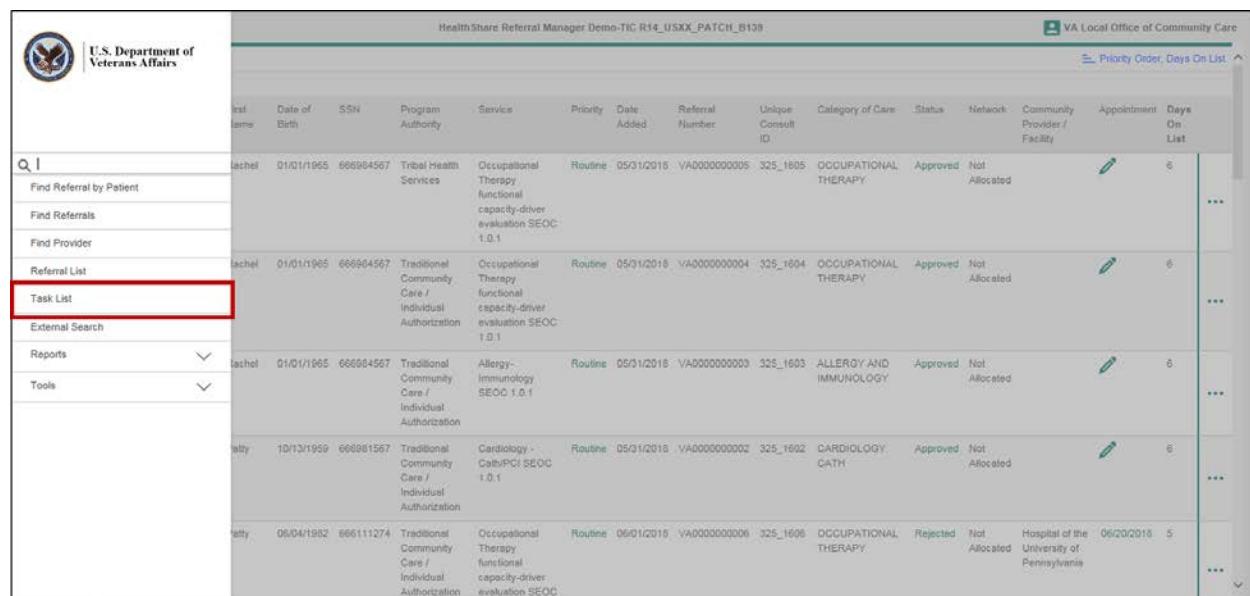
A task represents a discrete piece of work that needs to be done for a particular patient. A task in HSRM can be created automatically from a workflow or manually by any user.

15.1. View a Task List

A **Task List** is assigned to a user or group of users of HSRM. To view the **Task List**:

1. Click the **Menu** icon in the top left of any screen to view the menu options available.
2. Select **Task List** from the drop-down options to navigate to the **Task List** screen.

Figure 39: Referral List Screen – Task List



First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
lachel	01/01/1955	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/01/2016	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	...
lachel	01/01/1985	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/01/2016	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	...
lachel	01/01/1985	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/01/2016	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated		6	...
latty	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cat/PCI SEOC 1.0.1	Routine	05/01/2016	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated		6	...
latty	06/04/1982	666111274	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC	Routine	06/01/2016	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Rejected	Not Allocated	Hospital of the University of Pennsylvania	06/20/2016	5

15.2. Add a Task

HSRM allows users to assign a task to themselves, another user, or a group of users. Tasks can be added to a **Task List** from the **Referral List** screen or the **Referral Details** screen.

15.2.1. Add a Task from the Referral Details Screen

1. [Locate the referral](#) and navigate to the **Referral Details** screen.
2. Click the **Action Menu** icon in the top right of the **Patient Banner** to access the **Action Menu** drop-down list.

Figure 40: Patient Banner – Action Menu



3. Select **Add Task** from the drop-down menu. The **Task Edit** screen appears.

Figure 41: Referral Details Screen – Add Task

4. Complete the **Task Edit** screen.

Figure 42: Task Edit Screen – Task Item, Priority, and Status

15.2.2. Add a Task from the Referral List Screen

1. [Locate the referral](#) and navigate to the **Referral List** screen.
2. Click the **Action Menu** icon to the right of the of the referral row.

Figure 43: Referral List Screen – Action Menu

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6

3. Select **Add Task** from the drop-down menu. The **Task Edit** screen appears.
4. Complete the **Add Task** screen.

15.3. Complete the Add Task Screen

To add a task to a user's **Task List**, complete the **Add Task** screen:

1. [Navigate to the **Add Task** screen.](#)
 2. Click the **Magnifying Glass** icon within each field to view and select available options.
- Note:** **Task Priority, Status, Start Date, and Time** are mandatory fields and auto-populate. These fields can be edited. Mandatory fields are noted by the red asterisk.

Figure 44: Task Edit Screen – Assign Task

The screenshot shows the 'Assign Task' section of the Task Edit screen. It includes fields for 'Priority' (Normal), 'Status' (Pending), and 'Comments'. The 'Assign Task to User' dropdown is open, displaying a list of users with their names and email addresses. The user 'Corey Wilson' is selected and highlighted with a yellow background. At the bottom right of the screen are 'Accept Task' and 'Update' buttons.

3. Click the **Update** button at the bottom right of the screen to save the task.

Figure 45: Task Edit Screen – Assign Task to User Field and Update Button

The screenshot shows the 'Task Edit' screen for a patient named HSRMPAT, Rachel. The 'Assign Task to User' field contains 'Community Clinician X' and is highlighted with a red box. The 'Update' button is located at the bottom right of the screen.

15.4. Assign a User to a Task

A task can be assigned to a user upon creation, or a user can be assigned to a task via the following method:

1. [Navigate to the Task List.](#)

Figure 46: Referral List Screen – Task List

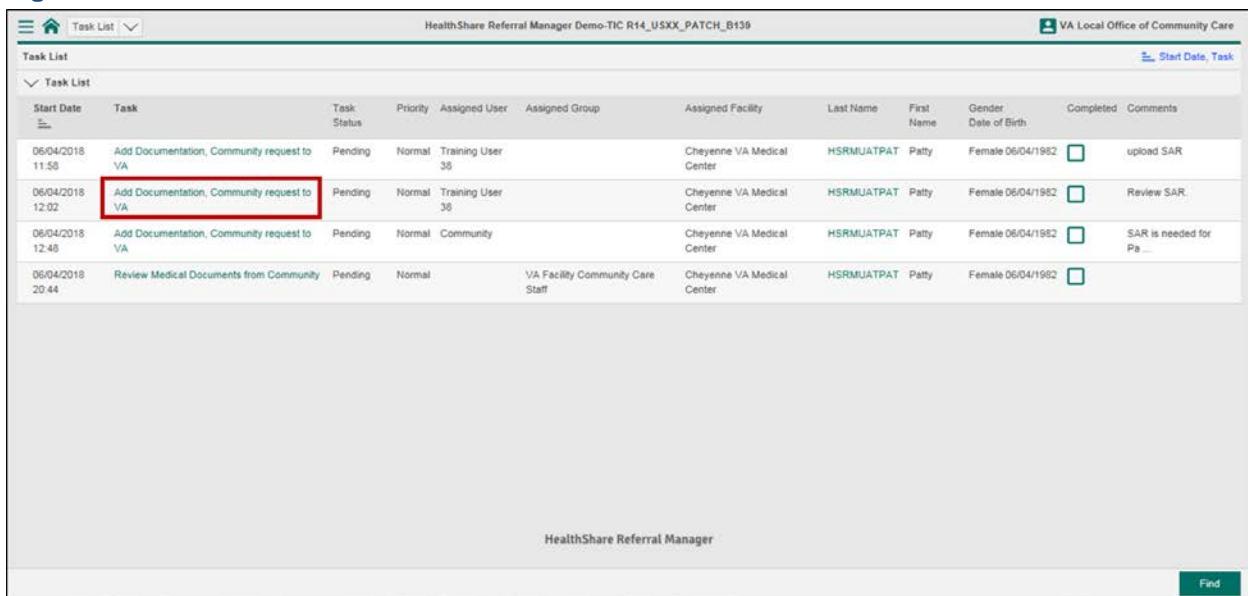
The screenshot shows the 'Referral List' screen. The 'Task List' item in the left sidebar is highlighted with a red box. The main table displays several rows of task information, including patient names, dates of birth, SSNs, service numbers, and task details like 'Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1'. The 'Task List' row has a green text title.

2. Open the unassigned task from the **Task List** by clicking the green text title in the **Task** column to navigate to the **Task Edit** screen.



*Note: Information within the **Priority**, **Status**, and **Appointment** columns are hyperlinks.*

Figure 47: Task List Screen – Task: Add Documentation



Task List												
Start Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Last Name	First Name	Gender	Date of Birth	Completed	Comments
06/04/2018 11:58	Add Documentation, Community request to VA	Pending	Normal	Training User 36		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	upload SAR
06/04/2018 12:02	Add Documentation, Community request to VA	Pending	Normal	Training User 36		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	Review SAR.
06/04/2018 12:48	Add Documentation, Community request to VA	Pending	Normal	Community		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	SAR is needed for Pa...
06/04/2018 20:44	Review Medical Documents from Community	Pending	Normal	V.A. Facility Community Care Staff		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	

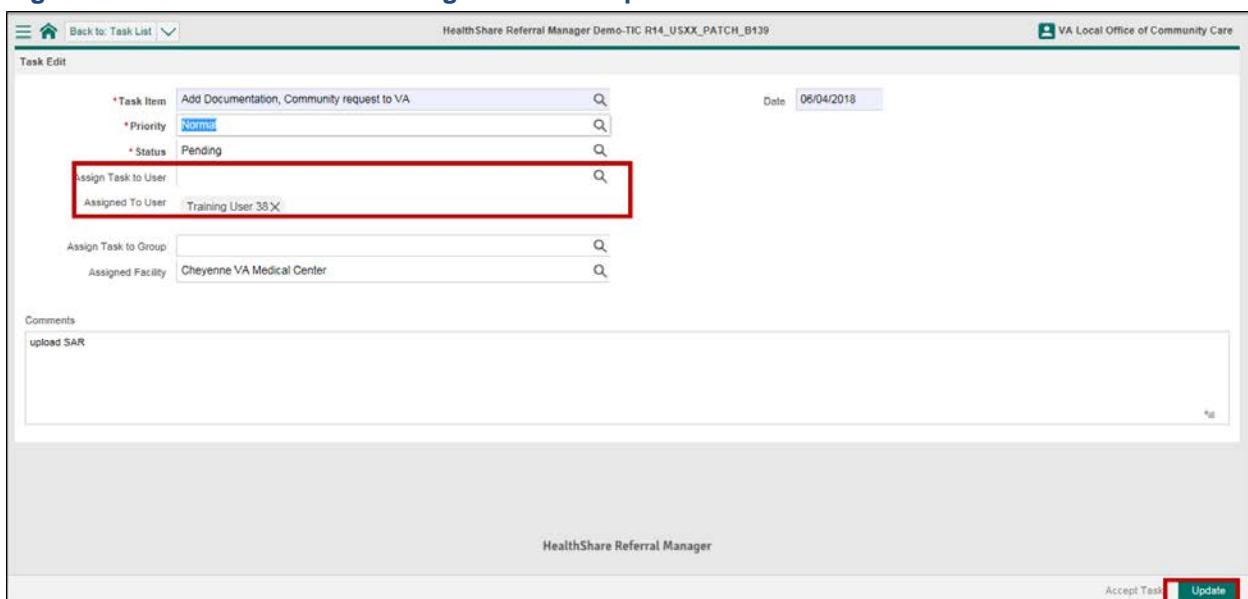
3. Click the **Magnifying Glass** icon and select a user from the list to assign the task to a user.



Note: When assigning a task to another user, the priority level indicates urgency of the task to the other user. Priority level can be used in lieu of email alerts.

4. Click the **Update** button at the bottom right of the screen to save the task assignment.

Figure 48: Task Edit Screen – Assign Task and Update Button



Task Edit	
* Task Item:	<input type="text" value="Add Documentation, Community request to VA"/> <input type="button" value="Q"/>
* Priority:	<input type="text" value="Normal"/> <input type="button" value="Q"/>
* Status:	<input type="text" value="Pending"/> <input type="button" value="Q"/>
Assign Task to User:	<input type="text" value="Training User 36"/> <input type="button" value="Q"/>
Assigned To User:	<input type="text" value="Training User 36 X"/> <input type="button" value="Q"/>
Assign Task to Group:	<input type="text"/> <input type="button" value="Q"/>
Assigned Facility:	<input type="text" value="Cheyenne VA Medical Center"/> <input type="button" value="Q"/>
Comments:	<input type="text" value="upload SAR"/> <input type="button" value="Q"/>
<input type="button" value="Accept Task"/> <input style="background-color: red; color: white; border: 1px solid black;" type="button" value="Update"/>	

15.5. Complete a Task

Users should manually mark tasks as complete when finished. To mark a task complete:

1. [Navigate to the Task List.](#)
2. Check the box within the **Completed** column of the corresponding task.

Figure 49: Task List Screen – Completed Checkbox

The screenshot shows a task list interface with the following details:

Start Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Last Name	First Name	Gender	Date of Birth	Completed	Comments
06/04/2018 11:58	Add Documentation, Community request to VA	Pending	Normal	Training User 38		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1952	<input type="checkbox"/>	upload SAR
06/04/2018 12:02	Add Documentation, Community request to VA	Pending	Normal	Training User 38		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1952	<input checked="" type="checkbox"/>	Review SAR.
06/04/2018 12:48	Add Documentation, Community request to VA	Pending	Normal	Community		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1952	<input type="checkbox"/>	SAR is needed for Pa ...
06/04/2018 20:44	Review Medical Documents from Community	Pending	Normal	VA Facility Community Care Staff		Cheyenne VA Medical Center	HSRMUATPAT	Patty	Female	06/04/1952	<input type="checkbox"/>	

A red box highlights the 'Completed' checkbox for the second task in the list.

15.6. Automated Tasks

HSRM creates automatic tasks based on triggers. Currently, there are six automatic tasks, which are as follows:

- When documents are uploaded to HSRM with the type Medical Documentation, an automated task is created on the facility community care staff member's task list to Review Medical Documents from VA.
- If medical documentation has not been received from a community provider within 25 days of the status being changed to Initial Care Given or within 25 days of the earliest appointment, an automated task is created on the facility community care staff member's task list.
- When a referral has a SEOC that requires precertification (meaning that the eligibility questionnaire is populated with other health insurance data and the referral is in the status of Sent or First Appointment made), an automated task is created on the Facility Revenue Group's task list.
- Seven days after a referral status is changed to Initial Care Given, the automated task Submit Medical Documentation is added to the community provider's task list.

- When a referral is returned from a provider, an automated task appears to alert the VA staff member.
- When a Secondary Authorization Request (SAR) has been attached to a referral, the automated task SAR Review appears on the facility community care staff member's task list.

16. View Referral Details

The **Referral Details** screen provides specific information about the Veteran's referral outlined in various sections, including **Referral Processing Information**, **Treating Facility Information**, and **Treatment Information**. Section visibility is based on user security rights.

Figure 50: Referral Details Screen – Processing and Treatment Details

16.1. View Additional Referral Information

Users can view additional information about a referral on the **Additional Referral Information** screen. This screen displays:

- [Patient Contacts](#)
- [Appointments](#)
- [Documents](#)
- Referral Notes

To view additional referral information:

1. [Locate the referral](#).
2. Select the referral from the **Referral List**.
3. Select the **Action Menu** icon to the right of the corresponding referral row.

Figure 51: Referral List – Action Menu Icon

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																	
VA Local Office of Community Care																	
Priority Order, Days On List																	
Referral List																	
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	

4. Select **Additional Referral Information** from the drop-down menu. The **Additional Referral Information** screen appears.

Figure 52: Referral List – Action Menu List

HealthShare Referral Manager QA-TIC R16_USXX_ADHOC1_B16																
HSRMPAT . Rachel																
02/25/1953 05 Yrs Female																
Referral List																
Referrals																
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network		
Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1953	666111244	Community Care Network	STAT (Urgent)	04/19/2018	VA0000000000	325_1476		Initial Care Given	CC Network 2			
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	02/25/1953	666111244		Routine	04/18/2018	VA0000000042	325_1465		Approved	Not Allocated			
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	02/25/1953	666111244		Routine	04/18/2018	VA0000000044	325_1467		Approved	Not Allocated			
Cheyenne VA Medical Center	HSRMPAT	Rachel	Rachel	02/25/1953	666111244		Routine	04/18/2018	VA0000000045	325_1468		Approved	Not Allocated			

Figure 53: Additional Referral Information Screen

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																																			
VA Local Office of Community Care																																			
Back to: Referral Details																																			
HSRMPAT . Rachel																																			
01/01/1965 53 Yrs Female 666984567																																			
Patient Contacts																																			
Inquiry Date																																			
Facility																																			
06/05/2018 15:51																																			
Comments																																			
Appointments																																			
Date	Time	Service Requested	Treating Specialty				Provider / Resource			Scheduling Method		Status	Remarks	Reason Cancel																					
06/05/2018	02:00	Labs/diagnostic studies relevant to the patient complaint/condition	Dermatology				Christopher Miller			Booked																									
Documents																																			
Document Type	Description				Date Created			Time Created			Last Update User		Last Update Facility																						
No matches found																																			
Referral Notes																																			
Date	Time	Type	Full Notes										Care Provider																						
05/31/2018	16:15	General Note	AUTHOR--GAINES,JUSTIN DATETIME--20180531161506-0600 COMMENT-- REASON FOR REQUEST-- JUSTIFICATION FOR NON VA CARE-- VA FACILITY DOES NOT PROVIDE THE REQUIRED SERVICE TYPE OF SERVICE: EVALUATION AND RECOMMENDATIONS NA CHIEF COMPLAINT: HEADACHE PATIENT HISTORY / CLINICAL FINDINGS / DIAGNOSIS (CO-MORBIDITIES): NA																																

17. View SEOc Information

A SEOc (commonly known as a bundle of services) consists of all clinically related services for one patient for a discrete diagnostic condition within a specific period of time across a continuum of care. It includes all physician, inpatient, and outpatient care as well as labs and diagnostics. For example, a patient who needs a hip replacement might need initial outpatient evaluation and treatment, joint replacement, diagnostic images/laboratories/studies, steroid injections, and physical therapy. Authorization for these services is covered as part of the SEOc. Within HSRM you can view a list of services associated with the SEOc. Think of this as your procedural overview of services.

There are two ways to view SEOc information. To view all SEOcs related to the referral, use the **Patient Details** screen. To view SEOcs related to the referral currently being viewed, use the **Referral Details** screen.

17.1. View Additional SEOc Information from the Patient Details Screen

To view all SEOcs related to the referral, use the **Patient Details** screen. To see additional SEOc information from the **Patient Details** screen:

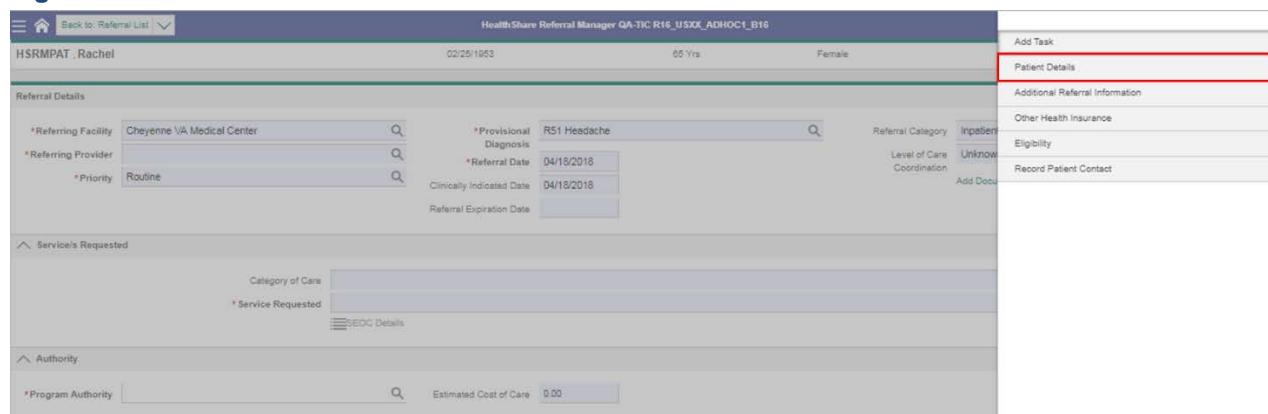
1. [Locate the referral](#) and navigate to the **Referral Details**.
2. Click the **Action Menu** icon in the top right of the **Patient Banner** to access the **Action Menu** drop-down list.

Figure 54: Patient Banner – Action Menu



3. Select **Patient Details** from the drop-down menu. The **Patient Details** screen appears.

Figure 55: Menu List – Patient Details



4. Click the **SEOC** link to view the SEOc list.

Figure 56: Patient Details – SEOC

The screenshot shows the 'Patient Registration' section of the HealthShare Referral Manager. It displays patient information: Last Name (HSRMPAT), First Name (Rachel), Middle Name (empty), Title (empty), Gender (Female), Date of Birth (01/01/1965). On the right, there are fields for Contact Notes and Care Providers, where 'SEOC' is entered and highlighted with a red box. Below this, the 'Patient Details' section shows address fields (Address, Address 2, City, State, ZIP, Country) and personal identifiers (SSN, ICN, EDIPI, Race, Ethnicity, Religion, Beneficiary Type). An 'Update' button is at the bottom right.

- Click the **SEOC Preauthorization Details** icon to view additional SEOC information. The **List of SEOC Services** screen appears.

Figure 57: SEOC List – Preauthorization Details

This screenshot shows the 'SEOC List' screen. It displays a single row for 'Allergy-Immunology SEOC 1.0.1' with a start date of 06/01/2018 and an expiration date of 11/28/2018. The 'Comments' column contains several notes about VA review, DME, and urgent/emergency prescriptions. A yellow highlight covers the entire row. A checkmark in the 'Active' column indicates the service is active.

Figure 58: List of SEOC Services

This screenshot shows the 'List of SEOC Services' screen. It displays a table for 'Allergy-Immunology SEOC 1.0.1'. The table includes columns for SEOC Service (Labs/diagnostic studies, Pathology services, RAST testing, Procedures, Seven (7) follow-up visits, Follow up biopsy), Quantity Limit (all listed as 8), and Quantity Consumed (all listed as 0). A note at the bottom states: 'The Veteran will be required to pay out of pocket for any urgent/emergency medications and can submit a reimbursement request to their local VA facility.'

17.2. View Additional SEOC Information from the Referral Details Screen

To view SEOCs related to the referral currently being viewed, use the **Referral Details** screen. To see additional SEOC information from the **Referral Details** screen:

1. [Locate the referral](#) and navigate to the **Referral Details** screen.
2. Click the SEOC Details link in the **Services Requested** section to view the SEOC list.

Figure 59: Referral Details Screen – SEOC Details Link

The screenshot shows the Referral Details screen for a patient named HSRMPAT, Kristen. The patient's information includes birth date (02/04/1974), age (44 Yrs), gender (Female), and VA Local Office of Community Care (666098776). The Referral Details section shows the referring facility (Cheyenne VA Medical Center), provider (KRISTEN MCCARTY), priority (Today), provisional diagnosis (R079 Chest pain, unspecified), referral date (06/05/2018), clinically indicated date (06/05/2018), referral category (Outpatient), and level of care (Basic). A link labeled "Add Documents to Referral" is visible. Below this, the "Service/s Requested" section is expanded, showing the category of care (CARDIOLOGY CATH) and service requested (Cardiology - Cath/PCI SEOC 1.0.1). A red box highlights the "SEOC Details" button. The "Authority" and "Insurance Details" sections are also partially visible.

3. The List of SEOC Services screen appears.

Figure 60: SEOC Services Screen

The screenshot shows the SEOC Services screen for the same patient. The Procedural Overview section lists the service requested: Cardiology - Cath/PCI SEOC 1.0.1. A red box highlights the "SEOC Service" section, which contains detailed information about the service, including diagnostic imaging, studies, and labs relevant to the patient's condition, as well as pre-operative medical and cardiac clearance. It also specifies inpatient admission for overnight stay following PCI and cardiac rehabilitation up to 36 visits per week. A note indicates six Cardiology follow-up visits for this episode of care, as clinically indicated.

18. Add Documents

HSRM provides the capability to upload and share documents between VA and the community care provider/facility. There are two different links to upload documents in HSRM. Access to each link is based on the user's role. Facility community care staff can access the link to add documents to a referral in the **Referral Details** section of the **Referral Details** screen. Community providers can access the link to add documents to

a referral in the **Treatment Information** section of the **Referral Details** screen. To upload and share documents:

1. [Locate the referral.](#)
2. Click the **Add Documents to Referral** link to open the **Documents** screen.
Facility community care staff can locate the link in the **Referral Details** section; community providers can locate the link in the **Treatment Information** section on the **Referral Details** screen.

Figure 61: Referral Details Screen – Add Documents

The screenshot displays the 'Referral Details Screen – Add Documents'. At the top, it shows basic patient information: HSRMPAT, Rachel, born 01/01/1965, 53 Yrs, Female, with VA Local Office of Community Care. Below this is the 'Referral Details' section, which includes fields for Referring Facility (Cheyenne VA Medical Center), Referring Provider (Justin Gaines), Priority (Routine), Provisional Diagnosis (R51 Headache), Referral Date (05/31/2018), Clinically Indicated Date (05/31/2018), Referral Category (Inpatient), and Level of Care Coordination (Moderate). A prominent red box highlights the 'Add Documents to Referral' button. The 'Services Requested' section shows OCCUPATIONAL THERAPY and Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1. The 'Authority' section shows Traditional Community Care / Individual Authorization and Estimated Cost of Care (0.00). The 'Insurance Details' section shows Payer (VA) and Payer Status. At the bottom right are 'Apply' and 'Update' buttons.

3. Click the **New** button at the bottom of the **Documents** screen. The **New Scan** screen appears.

Figure 62: Documents Screen – New Button

The screenshot shows the 'Documents' screen in the HealthShare Referral Manager. At the top, there is a header with the title 'HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139', the location 'VA Local Office of Community Care', and a user profile. Below the header, there is a table with columns for 'Document Type', 'Description', 'Date Created', 'Time Created', 'Last Update User', and 'Last Update Facility'. A message 'No matches found' is displayed below the table. At the bottom right of the screen, there is a red-bordered 'New' button.

4. Enter data in the corresponding fields on the **New Scan** screen.

 *Note: The **Date Created** and **Time Created** fields are filled in automatically and are read-only.*

5. Click the **Upload** button to locate and attach the file.

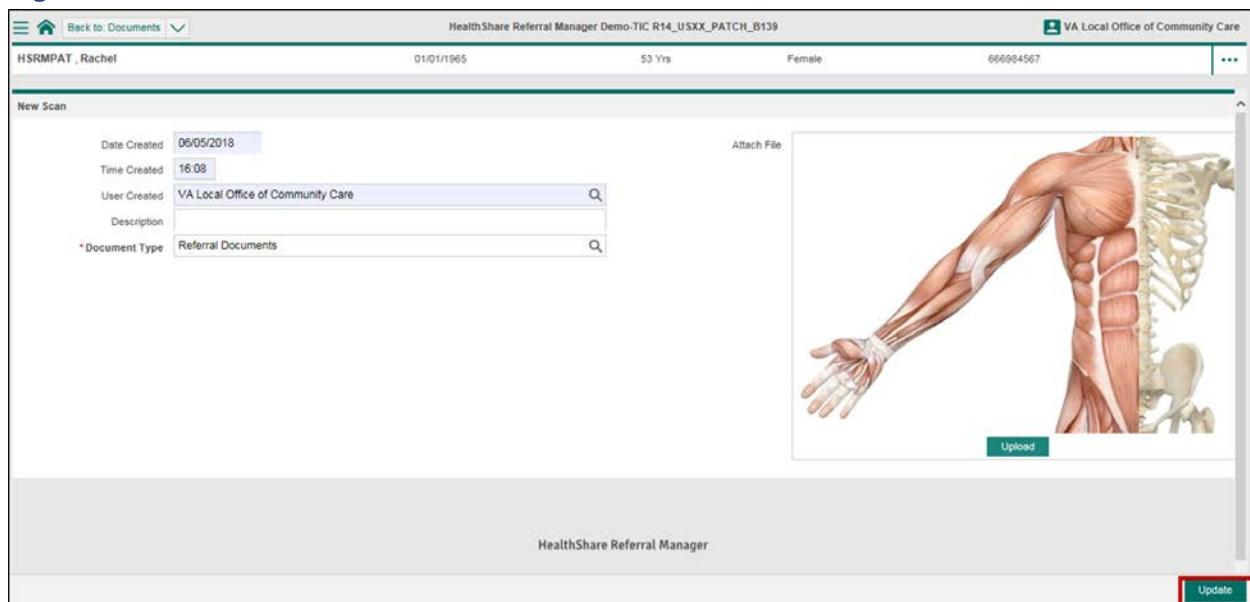
 *Note: It is possible to upload multiple documents by repeating this process one at a time. Multiple documents cannot be added simultaneously.*

6. Select the file from the computer's hard drive.

 *Note: HSRM accepts multiple file types, including JPG, BMP, PNG, Microsoft Office, and PDF. JPG and PDF files display in the preview section.*

7. Click the **Update** button at the bottom right of the screen to save.

Figure 63: New Scan Screen – Attach File



8. Select **Referral Details** from the **Breadcrumb Trail** drop-down list at the top left of the screen to go back to the **Referral Details** screen, or continue to add documents in the same manner.

Figure 64: Documents List Screen – Back to Referral Details

Documents					
Document Type	Description	Date Created	Time Created	Last Update User	Last Update Facility
Referral Documents		06/05/2018	16:10	VA Local Office of Community Care	Cheyenne VA Medical Center

19. Record Patient Contact

HSRM enables users to record contact with a patient regarding the referral. Anyone with access to the referral can view this information. To record contact with a patient:

1. [Locate the referral.](#)
2. Select the referral from the **Referral List**.

Figure 65: Patient Referral List – Referral

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																	VA Local Office of Community Care
Referral List																	Priority Order, Days On List
Referrals																	
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Kristen	02/04/1974	666098778		Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOG 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Made	Not Allocated		06/05/2018	0
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Cheyenne VA Medical Center	HSRMPAT	Patty	10/13/1959	666981567		Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated			6

3. Select the **Action Menu** icon to the right of the corresponding referral row.

Figure 66: Referral Details Screen – Action Menu

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																	VA Local Office of Community Care
Referral List																	Priority Order, Days On List
Referrals																	
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6

4. Select **Record Patient Contact** from the drop-down menu. The **Inquiry Contact** screen appears.

Figure 67: Action Menu – Record Patient Contact

HealthShare Referral Manager QA-TIC R16_USXX_ADHOC1_B16																	Add Task	
HSRMPAT : Rachel																	Patient Details	
02/25/1953																	66 Yrs	Female
Referral Details																	Additional Referral Information	
*Referring Facility	Cheyenne VA Medical Center				*Provisional Diagnosis	R51 Headache				Referral Category	Inpatient	Other Health Insurance						
*Referring Provider					*Referral Date	04/18/2018				Level of Care Coordination	Unknown	Eligibility						
*Priority	Routine				Clinically Indicated Date	04/13/2018				Referral Expiration Date		Record Patient Contact						
Services Requested																	Add Doc	
Category of Care																		
*Service Requested																		
SEOC Details																		
Authority																		
*Program Authority																		
Estimated Cost of Care: 0.00																		

5. Enter the patient contact information.

6. Click the **Update** button at the bottom right of the screen to save changes.

Figure 68: Inquiry Contact Screen – Update

HSRMPAT .Rachel 01/01/1965 53 Yrs Female 666984567

Inquiry Contact

Contact

Facility	Cheyenne VA Medical Center	Q	*Contact Method	Telephone	...
*Inquiry Date	06/06/2018	...	*Duration	5	
Inquiry Time	07:57		Indirect Time		
*Request Status	Completed	Q	Interpreting Time		
User Last Update					

Contact Details

HealthShare Referral Manager

Update

20. Assign a Referral to a Community Provider/Facility

A referral with the Approved status can be assigned to a community provider/facility. After the referral is assigned, the status will automatically change to Sent, and the Ordering Officer will populate the appropriate field with the name of the user who assigned the referral. **To assign a referral to a community provider/facility:**

1. [Locate the referral.](#)
2. Navigate to the **Community Provider/Facility Information** section on the **Referral Details** screen. Click the **Magnifying Glass** icon and select a network from the list. This filters down the community provider/facility list (optional).



*Note: The **Network** field defaults to Not Allocated.*

Figure 69: Referral Details Screen – Network Drop-Down List

Community Provider/Facility Information

*Network

Community Provider / Facility	Description	Contract Number	Q
Not Allocated			
CC Network 1	CCN1		
CC Network 2	CCN2		
CC Network 3	CCN3		
CC Network 4	CCN4		
Not Allocated	N		

Treatment Info

Treatment Notes

Treating Specialty

Provider Name

Allocated Date

Appointment Date

Page 1

Apply **Update**

3. Navigate to the **Community Provider/Facility Information** section on the **Referral Details** screen. Click the **Magnifying Glass** icon and select a community care provider/facility and/or a provider from the list.



Note: Users can select a community provider/facility and a provider.

Figure 70: Referral Details Screen – Network Field

4. Click the **Update** button at the bottom right of the screen to save changes.

Figure 71: Referral Details Screen – Community Provider/Facility Field

21. Accept a Referral

After the referral is assigned to a community provider/facility, that community provider/facility can accept the referral.

1. [Locate the referral.](#)
2. Navigate to the **Referral Processing Information** section and click the **Magnifying Glass** icon to change the status to Accepted.



Note: If a referral is rejected, it is returned to facility community care staff to be assigned to another community provider/facility or to add information or documents and send back to the same community provider/facility.

3. Click the **Update** button at the bottom right of the screen to save changes.

Figure 72: Referral Details Screen – Accepted Status

The screenshot shows the 'Referral Processing Information' section of the Referral Details screen. The 'Status' field is highlighted with a red box and contains the value 'Accepted'. Other fields visible include 'Source of Referral' (Interfaced from VA), 'Comments' (empty), and 'Assigned User' (empty). To the right, there is a panel with metadata: Date Added (05/31/2018), Update Date (06/05/2018), Update Time (15:51), Update User (VA Local Office of Community Care), Update Facility (Cheyenne VA Medical Center), and Ordering Officer (empty). At the bottom right are 'Apply' and 'Update' buttons, with 'Update' being highlighted by a red box.

21.1. Reject a Referral

After the referral is assigned to a community provider/facility, that community provider/facility can reject the referral. When a community provider/facility rejects a referral, a referral return reason must be entered, as the field becomes mandatory.

1. [Locate the referral.](#)
2. Navigate to the **Referral Processing Information** section and click the **Magnifying Glass** icon to change the status to Rejected. When the status of Rejected is chosen, the **Referral Return Reason** field becomes mandatory.
3. Click the **Magnifying Glass** icon and select a **Referral Return Reason**.

Figure 73: Referral Details Screen – Referral Return Reason

The screenshot shows the 'Referral Processing Information' section of the Referral Details screen. A red box highlights the 'Status' field, which is set to 'Rejected'. Another red box highlights the 'Referral Return Reason' section, which contains a table with columns 'Description' and 'Code'. The table lists various reasons for rejection, such as 'Already Appointed', 'Appointed with Incorrect Provider / Type of Care', and 'CCN Provider meets appointment timeliness standards'. The 'Community Provider/Facility' section is also visible, showing a list of reasons like 'Excluded CCN Healthcare Service', 'Geographic accessibility outside of standards', and 'No CCN Provider Available'. The 'Treatment Information' section is partially visible at the bottom.

- Click the **Update** button at the bottom right of the screen to save changes.



Note: If a referral is rejected, it is returned to facility community care staff to be assigned to another community provider/facility or to add information or documents and send back to the same community provider/facility. To send to the same or another community provider, the facility community care staff member will select a community provider, manually change status to Sent, and save the referral. This will send the referral back to the community provider or to a new community provider.

Figure 74: Referral Details Screen – Rejected Status

The screenshot shows the 'Referral Processing Information' section of the Referral Details screen. The 'Status' field is highlighted with a red box and set to 'Rejected'. Below it, the 'Referral Return Reason' section shows a single reason: 'Unable to contact Veteran within 10 business days'. The 'Community Provider/Facility Information' and 'Treatment Information' sections are also visible.

22. Manage Appointments

Once the Veteran's referral is accepted by the community provider/facility, an initial appointment can be recorded in HSRM. Once the first appointment is recorded, the status of the referral will automatically change to First Appointment Made. This status change only occurs after the first appointment is recorded.



Note: Remember that the appointment is recorded in HSRM, but it is booked in the community provider/facility's external scheduling system.

22.1. Record an Appointment

1. [Locate the referral](#).
2. Click the **Record Appointment** icon in the row of the corresponding referral. The **Record Appointment** screen appears.

Figure 75: Referral List – Appointment Edits

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139																
VA Local Office of Community Care																
Priority Order, Days On List																
Referral List																
Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment Days On List
Cheyenne VA Medical Center	HSRMPAT	Kristen	02/04/1974	666098776		Traditional Community Care / Individual Authorization	Cardiology - CathPCI/SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Made	Not Allocated	06/05/2018	2
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984587		Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated		7
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984587		Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated		7

3. Record the appointment details in the appointment fields.
4. Click the **Update** button at the bottom right of the screen to save the appointment information.



Notes:

- Time is saved as military time but can be entered either in military time or in 12-hour format (e.g., 2 p.m. automatically updates to 14:00).
- The **Service Requested** field is auto-populated from the referral and cannot be edited.

Figure 76: Record Appointment Screen – Update

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139

VA Local Office of Community Care

Record Appointment

HSRMPAT , Rachel 01/01/1965 53 Yrs Female 666904567 ...

* Service Requested: Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1

* Appointment for: Functional capacity or Driver evaluations

Scheduling Method: Scheduled by VA

Community Provider/Facility: Aberdeen VA Clinic

* Date: 06/06/2018 * Time: 02:00

Provider Name: Richard Neil

Provider Search: General Practice

* Treating Specialty: 1 hour

Appointment Duration: 1 hour

Appointment Reason:

Reason for Selecting Provider:

Notes:

HealthShare Referral Manager

Update



Note: Once the first appointment is recorded, the referral status automatically changes to First Appointment Made. Appointments can be recorded in the same manner, but the referral status will only change to First Appointment Made when the first appointment is recorded.

22.1.1. Add a Community Provider to an Appointment

If the name of the community provider is known, it can be selected from the **Provider Name** field. If the name of the community provider is not known, the user can search for it.

1. Click the **Provider Search** link on the **Record Appointment** screen.

Figure 77: Record Appointment Screen – Provider Search

HealthShare Referral Manager QA-TIC R14_USXX_ADHOC1_BB

VA Local Office of Community Care

Record Appointment

HSRMPAT , Lauren 11/25/1921 96 Yrs Female 666211292 ...

* Service Requested: Ophthalmology SEOC 1.0.2

* Appointment for: Anesthesia consultation related to the procedure

Scheduling Method: Scheduled by Contractor

Community Provider/Facility: St. Mary's Hospital

* Date: 06/07/2018 * Time: 02:00

Provider Name: DAVID RIGO

Provider Search: Addiction Medicine

* Treating Specialty:

Appointment Duration:

Appointment Reason:

Reason for Selecting Provider:

Notes:

HealthShare Referral Manager

Update

2. Enter the search criteria in the community provider search fields.
3. Click the **Find** button.

Figure 78: Provider Search Screen – Specialty and Last Name

The screenshot shows the 'Provider Search' interface. At the top, there are search filters for 'Facility', 'State', 'City', and 'Affiliation'. Below these, a table displays provider details: Facility (BIDCM Biologic Therapy (IA,DoD)), Care Site (BIDCM Biologic Therapy), Care Provider (ROBERT TAYLOR (IA,DoD)), Address (375 Longwood Ave MASCO 413), City (BOSTON), State (Massachusetts), ZIP Code (02115), Telephone (937-555-1212), and Email (longwood@bidcm.com). The 'Specialty' field is populated with 'Anesthesiology' and the 'Last Name' field is populated with 'taylor', both of which are highlighted with red boxes. The 'Find' button at the bottom right is also highlighted with a red box.

4. Select the provider to be added to the appointment; the **Record Appointment** screen appears with the community provider added provider.
5. Click the **Update** button to add the community provider to the appointment.

Figure 79: Record Appointment Screen

The screenshot shows the 'Record Appointment' screen. It includes fields for 'Service Requested' (Ophthalmology SEOC 1.02), 'Appointment for' (Anesthesia consultation related to the procedure), 'Scheduling Method' (Scheduled by Contractor), 'Community Provider/facility' (BIDCM Biologic Therapy), 'Date' (06/07/2018), 'Time' (02:00), 'Provider Name' (ROBERT TAYLOR), 'Provider Search' (Anesthesiology), 'Appointment Duration' (empty), 'Appointment Reason' (empty), 'Reason for Selecting Provider' (empty), and 'Notes' (empty). The 'Service Requested' and 'Treating Specialty' fields are highlighted with red boxes. The 'Update' button at the bottom right is also highlighted with a red box.

22.2. Record an Appointment from the Component Menu Icon

1. [Locate a referral](#).
2. Navigate to the **Referral Details** screen.

- Click the **Component Menu** icon in the top right of the **Referral Details** screen to access the **Component Menu** drop-down list.

Figure 80: Referral Details Screen – Component Icon

The screenshot shows the 'Referral Details' section of the HealthShare Referral Manager. At the top right, there is a 'Component Menu' icon (three vertical dots). A red box highlights this icon. Below it, the 'Referral Details' form contains fields for Referring Facility (Cheyenne VA Medical Center), Referring Provider (KRISTEN MCCARTY), Priority (Today), Provisional Diagnosis (R079 Chest pain, unspecified), Referral Date (06/05/2018), Clinically Indicated Date (06/05/2018), Referral Category (Outpatient), Level of Care Coordination (Basic), and Referral Expiration Date (12/02/2018). There is also a link 'Add Documents to Referral'.

- Select **Record Appointment** from the drop-down menu. The **Record Appointment** screen appears.

Figure 81: Referral Details Screen – Record Appointment

The screenshot shows the same 'Referral Details' screen as Figure 80. However, the 'Component Menu' dropdown has been opened, and the 'Record Appointment' option is highlighted with a red box. Other options in the dropdown include 'Print' and 'Letters'.

- Record the appointment details in the appointment fields.
- Click the **Update** button at the bottom right of the screen to save the appointment information.

Figure 82: Record Appointment Screen – Update

The screenshot shows the 'Record Appointment' screen. It includes fields for Service Requested (Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1), Appointment for (Functional capacity or Driver evaluations), Scheduling Method (Scheduled by VA), Community Provider/Facility (Aberdeen VA Clinic), Date (06/06/2018), Time (02:00), Provider Name (Richard Neil), Treating Specialty (General Practice), Appointment Duration (1 hour), Appointment Reason (Reason for Selecting Provider: [empty]), Notes (Notes: [empty]), and a large Notes area (Notes: [empty]). At the bottom right, there is a red 'Update' button.

22.3. Cancel an Appointment

1. [Locate the referral](#) on the **Referral List**.
2. Click the **Appointment Date** link for the referral. The **Appointment Information** screen appears.

Figure 83: Record Appointment Screen – Date

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved		Not Allocated		7
Cheyenne VA Medical Center	HSRMPAT	Patty	10/13/1959	666981567		Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved		Not Allocated		7
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567		Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	First Appointment Made		Not Allocated		7

3. Click the **Change Status** link. The **Appointment Change Status** screen appears.

Figure 84: Record Appointment Screen – Change Status

Appointment Details		Scheduling Method	
Treating Specialty	Dermatology	Appointment Duration	
Provider / Resource	Christopher Miller	Appointment Reason	
Service Requested	Labs/diagnostic studies relevant to the patient complaint/condition	Reason for Selecting Provider	
Appointment Status	Booked	Booked Date	06/05/2016
Appointment Date	06/05/2016	Booked Time	15:51
Appointment Time	02:00	Booked By	VA Local Office of Community Care
Notes			
Update			

4. Click the **Magnifying Glass** icon in the **Change Status To** field and select Cancelled from the drop-down list.
5. Click the **Magnifying Glass** icon in the **Reason for Cancellation** field and select the appropriate reason for cancellation from the available options.
6. Enter any additional information regarding the appointment cancellation.
7. Click the **Update** button at the bottom right of the screen to save changes.

Figure 85: Record Appointment Screen – Update

The screenshot shows the 'Record Appointment Screen – Update' in the HealthShare Referral Manager. At the top, it displays basic patient information: HSRMPAT , Rachel, Date of Birth: 01/01/1965, Age: 53 Yrs, Gender: Female, and Referral ID: 666984567. Below this is the 'Appointment Change Status' section. It includes fields for 'Change Status To' (set to 'Canceled'), 'Reason for Cancellation' (set to 'Canceled by Patient'), 'Free Text Reason for Cancellation' (set to 'Patient has been admitted'), 'Cancel Date' (set to 06/06/2018), 'Cancel Time' (set to 08:29), and 'Reason for No Show'. There are also search and 'Update' buttons at the bottom right.

23. Indicate Initial Care Given

After a Veteran attends his or her first appointment, the community provider follows up on the appointment by entering treatment notes and uploading medical documentation. This status of the referral is also manually changed to **Initial Care Given** on the **Referral Details** screen. This status change occurs only after the first appointment.

1. Locate the referral.

Figure 86: Referral List Screen – Referral Information

The screenshot shows the 'Referral List Screen – Referral Information' in the HealthShare Referral Manager. It lists several referrals with columns for Assigned User, Referring Facility, Last Name, First Name, Date of Birth, SSN, Program Authority, Service, Priority, Date Added, Referral Number, Unique Consult ID, Category of Care, Status, Network, Community Provider / Facility, Appointment, and Days On List. One specific referral for 'Cheyenne VA Medical Center' is highlighted with a red border. This row corresponds to the entry in Figure 85.

2. Navigate to the **Referral Processing Information** section on the **Referral Details** screen.

Figure 87: Referral Details Screen – Change Status

The screenshot shows the 'Treatment Information' section of the Referral Details screen. The 'Status' field is currently set to 'Initial Care Given'. Other status options listed include Accepted, Approved, Cancelled, and Closed. The 'Treatment Information' section also includes fields for Payer (VA), Payer Status, Source of Referral (Interfaced from VA), Date Added (05/31/2018), and various update details.

- Click the **Magnifying Glass** icon to update the status. If the patient attended the appointment, change the status field within the **Treatment Information** section from First Appointment Made to Initial Care Given from the selection list.

Figure 88: Referral Details Screen – Change Status to Initial Care Given

The screenshot shows the 'Treatment Information' section of the Referral Details screen after the status has been updated. The 'Status' field now displays 'Initial Care Given'. The rest of the screen remains largely the same, with fields for Payer (VA), Payer Status, Source of Referral (Interfaced from VA), Date Added (05/31/2018), and various update details.

- Enter any relevant treatment notes regarding the appointment within the **Treatment Notes** field of the **Treatment Information** section.
- Click the **Update** button at the bottom right of the screen to save changes.

Figure 89: Referral Details Screen – Treatment Information

The screenshot shows a software interface for managing referrals. At the top, there's a header bar with a back arrow and the title 'Treatment Information'. Below this is a large text area labeled 'Treatment Notes' which is currently empty. In the bottom right corner of this area, there are two buttons: 'Apply' and 'Update', with 'Update' being highlighted by a red box.

24. Close a Referral

After the episode of care is complete for the referral, and the community provider has submitted all medical documentation to HSRM, the facility community care staff reviews the medical documentation and determines if the referral can be closed. The facility community care staff member receives a task on his or her task list whenever medical documentation is uploaded into HSRM. Once the facility community care staff member has reviewed the documentation and confirms that the episode of care is complete on the referral, the staff member will update the referral status to **Closed** on the **Referral Details** screen.

1. [Locate the referral](#).
2. Navigate to the **Referral Processing Information** section and click the **Magnifying Glass** icon to change the status to **Closed**.
3. Click the **Update** button at the bottom right of the screen to save changes.

Figure 90: Referral Processing Information – Closed Status

This screenshot displays the 'Referral Processing Information' screen. At the top left, it says 'Referral Number VA0000000003'. Below that, the 'Status' field is set to 'Closed', which is also highlighted by a red box. To the right of the status field are sections for 'Source of Referral' (set to 'Interfaced from VA'), 'Comments' (empty), and a timestamp 'Date Added 05/31/2018'. Further down, there are fields for 'Referral Return Reason' (empty), 'Unique Consult ID' (set to '325_1603'), 'Audit Trail' (empty), 'Assigned User' (empty), and 'Comments' (empty). On the right side, there are audit logs: 'Update Date 06/06/2018', 'Update Time 08:49', 'Update User VA Local Office of Community Care', 'Update Facility Cheyenne VA Medical Center', and 'Ordering Officer' (empty). At the bottom, there are sections for 'Community Provider/Facility Information' (with 'Network' set to 'Not Allocated' and 'Community Provider / Facility' set to 'Aberdeen VA Clinic') and 'Treating Specialty' (set to 'Dermatology' with provider 'Christopher Miller'). Finally, at the very bottom right are 'Apply' and 'Update' buttons, with 'Update' being highlighted by a red box.

25. Access an Audit Trail

The **Audit Trail** displays the lifecycle of an individual referral, noting any information updates or status changes. To access an **Audit Trail**:

1. [Locate the referral.](#)
2. Navigate to the **Referrals Details** screen.
3. Navigate to the **Referral Processing Information** section and click the **Audit Trail** link.

Figure 91: Referral Processing Information Section – Audit Trail

The screenshot shows the 'HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139' interface. At the top, patient details are shown: HSRMPAT , Rachel, 01/01/1965, 53 Yrs, Female, and VA Local Office of Community Care. Below this, the 'Authority' section includes a 'Program Authority' dropdown set to 'Traditional Community Care / Individual Authorization' and an 'Estimated Cost of Care' input field showing '0.00'. The 'Insurance Details' section shows 'Payer' as 'VA' and 'Payer Status' as 'Active'. The 'Referral Processing Information' section is expanded, displaying the following fields:

- Referral Number: VA00000000003
- Status: Closed
- Referral Return Reason:
- Unique Consult ID: 325_1603 (highlighted with a red box)
- Source of Referral: Interfaced from VA
- Comments: (empty)
- Date Added: 05/31/2018
- Update Date: 06/06/2018
- Update Time: 08:49
- Update User: VA Local Office of Community Care
- Update Facility: Cheyenne VA Medical Center
- Ordering Officer: (empty)

The 'Community Provider/Facility Information' section shows:

- Network: Not Allocated
- Community Provider / Facility: Aberdeen VA Clinic
- Treating Specialty: Dermatology
- Provider Name: Christopher Miller
- Allocated Date: 06/06/2018
- Appointment Date: 06/05/2018

At the bottom right are 'Apply' and 'Update' buttons.

4. Click the rectangular box next to the icon to view historical changes to referral information and statuses.



Notes:

- The **Data Audit Trail** screen shows the **Patient Banner** and the path the referral has taken. The trail is displayed from bottom to top.
- Blue **Info** icons denote changes to information.
- Green **Checkmark** icons denote changes to status.
- The **Data Audit Trail** screen displays what field has changed, including the original field information and the updated field information.

Figure 92: Data Audit Trail Screen – Referral Update

Figure 93: Data Audit Trail Fields Screen

Field	Value Changed From	Value Changed To
WL_DaysOnList	6	7 ^{AA}
WL_DaysWaiting	5	6
WL_DeferredDaysWaiting	5	6
WL_TotDaysOnList	6	7

26. Reports

HSRM has reporting capabilities that allow VA staff to view reports to ensure that timely service is provided to Veterans. Reports can be filtered and customized based on user preferences.



Note: Only users with certain security rights can access the reports and analytics functionality in HSRM.

26.1. Run a Report

Users with appropriate security rights can run reports in HSRM. All reports are run using the same steps, but they have different selection criteria. To run a report:

1. Click the **Menu** icon in the top left of the screen to view the menu options available.
2. Select **Reports** from the drop-down options and choose the desired report.

Figure 94: Referral List – Reports: Referral Wait Times

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139													
Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network/Community Provider/Facility	Appointment Date	Days On List
Search	Patricia	02/04/1974	666098776	Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Mode	Not Allocated	2
Find Referral by Patient	Patricia	01/01/1965	6660984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated	7
Find Referrals	Patricia	01/01/1965	6660984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated	7
Find Provider	Patricia	10/13/1959	6660981587	Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated	7
Referral List													
Task List													
External Search													
Reports													
Task Review Report													
Patients Waiting													
Referral Wait Times													
Referral Processing Report													
Clinical Staff / Pending Status Report													

3. Select the criteria to be used to run the report from the fields available.

4. Click the **Print Preview** icon to run the report.

Figure 95: Report Parameters Screen – Referral, Specialty, Consultant, and Print Preview

Report Parameters

Referred to Hospital

Referral Status

Specialty

Consultant

5. Navigate to the new browser tab that displays the report.

Figure 96: Wait List Times Report

USXX - Wait List Times														
Hospital: Hospital of the University of Pennsylvania														
Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14														
Procedure	Referral Status	0 - 1 Weeks	1 - 2 Weeks	2 - 3 Weeks	3 - 4 Weeks	4 - 5 Weeks	5 - 6 Weeks	6 - 7 Weeks	7 - 8 Weeks	8 - 9 Weeks	9 - 10 Weeks	10 - 11 Weeks	11 - 12 Weeks	12+ Weeks Total
Occupational Therapy functional capacity-driver evaluation SEO Accepted C 1.0.1	Accepted	1	0	0	0	0	0	0	0	0	0	0	0	1

26.2. Print a Report

Reports can be printed from the preview screen. This section provides instructions for printing in Google Chrome and Internet Explorer Web browsers.

26.2.1. Print a Report in Chrome

1. [Run any report.](#)
2. Click the **Print** icon in the top right of the report. The **Print** screen appears.

Figure 97: Report in Chrome – Print Icon

Region.USXX.Reports.ZEN.USXXVARefWaitTimes.cls 1 / 3

USXX - Wait List Times

USXX - Wait List Times
Hospital:
Specialty: All
Provider: All
Referral Status: Accepted; Approved
Referral Procedure: All

Hospital: Hospital of the University of Pennsylvania

Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

Procedure	Referral Status	0 - 1 Weeks	1 - 2 Weeks	2 - 3 Weeks	3 - 4 Weeks	4 - 5 Weeks	5 - 6 Weeks	6 - 7 Weeks	7 - 8 Weeks	8 - 9 Weeks	9 - 10 Weeks	10 - 11 Weeks	11 - 12 Weeks	12+ Weeks	Total
Occupational Therapy functional capacity-driver evaluation SEO	Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0	1
C 1.0.1															

3. Select print preferences from the print options listed.
4. Click the **Print** button.

Figure 98: Print Screen in Chrome – Print Button

Print

Total: 3 sheets of paper

Print Cancel

Destination: Send To OneNote 2016 Change...

Pages: All e.g. 1-5, 8, 11-13

Color: Color

Paper size: Letter

Quality: 600 dpi

Scale: Fit to page 89

Print using system dialog... (Ctrl+Shift+P)

USXX - Wait List Times

USXX - Wait List Times
Hospital:
Specialty: All
Provider: All
Referral Status: Accepted; Approved
Referral Procedure: All

Hospital: Hospital of the University of Pennsylvania

Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

Procedure	Referral Status	0 - 1 Weeks	1 - 2 Weeks	2 - 3 Weeks	3 - 4 Weeks	4 - 5 Weeks	5 - 6 Weeks	6 - 7 Weeks	7 - 8 Weeks	8 - 9 Weeks	9 - 10 Weeks	10 - 11 Weeks	11 - 12 Weeks	12+ Weeks	Total
Occupational Therapy functional capacity-driver evaluation SEO	Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0	1
C 1.0.1															

Created on 06-Jun-2018 12:28 by VA Supervisor Page 1 of 3

USXX - Wait List Times

26.2.2. Print a Report in Explorer

1. [Run any report](#).
2. Click the **Print File** icon on the bottom of the report. The **Print** window appears.

Figure 99: Report in Explorer – Print Icon

USXX - Wait List Times

Hospital:
Specialty: All
Provider: All
Referral Status: Accepted; Approved
Referral Procedure: All

Hospital: Hospital of the University of Pennsylvania

Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

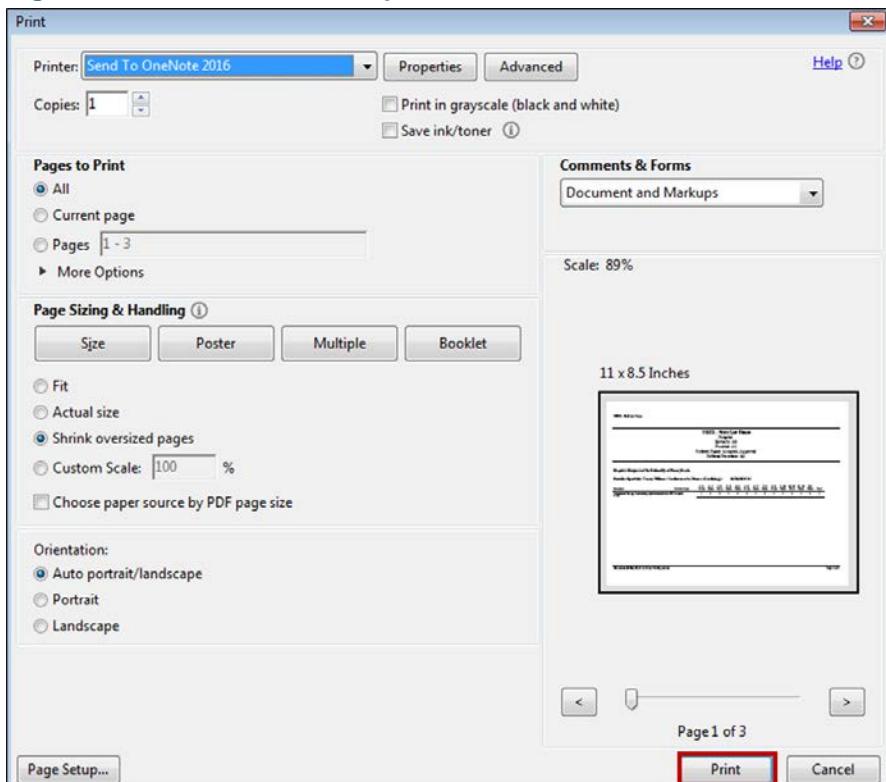
Procedure	Referral Status	0-1 Weeks	1-2 Weeks	2-3 Weeks	3-4 Weeks	4-5 Weeks	5-6 Weeks	6-7 Weeks	7-8 Weeks	8-9 Weeks	9-10 Weeks	10-11 Weeks	11-12 Weeks	12+ Weeks	Total
Occupational Therapy functional capacity-driver evaluation SEO Accepted	C 101	1	0	0	0	0	0	0	0	0	0	0	0	0	1

Created on 06 Jun 2018 12:21 by VA Supervisor

Page 1 of 3

3. Select print preferences from the print options listed.
4. Click the **Print** button.

Figure 100: Print Screen in Explorer – Print Button



26.3. Download a Report

Reports can be downloaded from the **Preview** screen. This section provides instructions for downloading reports in Google Chrome and Internet Explorer Web browsers.

26.3.1. Download a Report in Chrome

1. [Run any report.](#)
2. Click the **Download** icon in the top right of the report. The **Save As** window appears.

Figure 101: Report in Chrome – Download Icon

The screenshot shows a report titled "USXX - Wait List Times" generated by "Region.USXX.Reports.ZEN.USXXVRefWaitTimes.cls". The report details are as follows:

USXX - Wait List Times
Hospital: All
Specialty: All
Provider: All
Referral Status: Accepted; Approved
Referral Procedure: All

Hospital: Hospital of the University of Pennsylvania

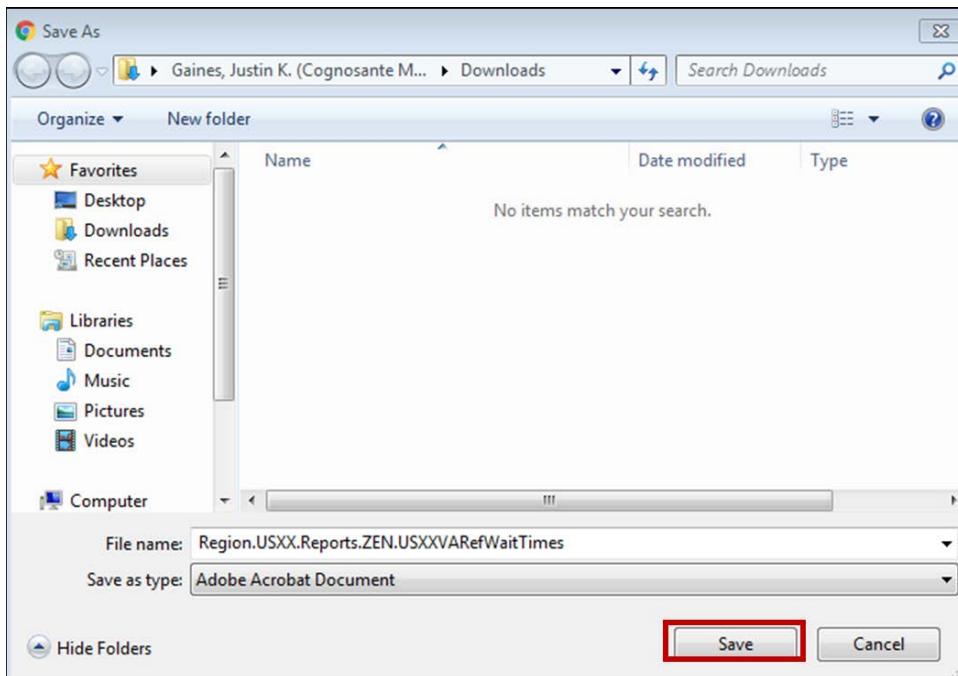
Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

Procedure	Referral Status	0 - 1 Weeks	1 - 2 Weeks	2 - 3 Weeks	3 - 4 Weeks	4 - 5 Weeks	5 - 6 Weeks	6 - 7 Weeks	7 - 8 Weeks	8 - 9 Weeks	9 - 10 Weeks	10 - 11 Weeks	11 - 12 Weeks	12+ Weeks	Total
Occupational Therapy functional capacity-driver evaluation SEO	Accepted	1	0	0	0	0	0	0	0	0	0	0	0	0	1

At the bottom right of the report area, there are three circular buttons with icons: a magnifying glass (+), a plus sign (+), and a minus sign (-).

3. Input a file name and click the **Save** button.

Figure 102: Save As Window in Chrome – Save Button



26.3.2. Download a Report in Explorer

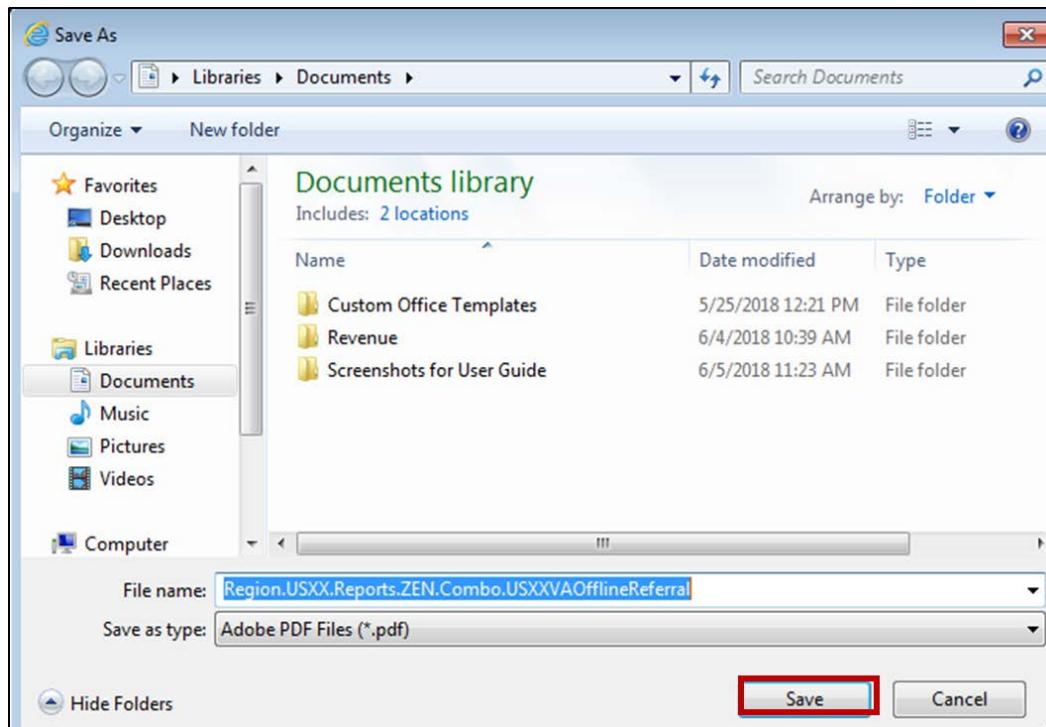
1. [Run any report.](#)
2. Click the **Save As** icon on the bottom of the report. The **Save As** window appears.

Figure 103: Report in Explorer – Save As Icon

The screenshot shows a report titled 'USXX - Wait List Times'. It includes search filters: Hospital: Hospital of the University of Pennsylvania, Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology), Referral Status: Accepted; Approved, Referral Procedure: All. Below these are tables for 'Hospital' and 'Provider/Specialty'. At the bottom is a toolbar with icons for Print, Save, and other functions, with the 'Save' icon being highlighted by a red box. The footer indicates the report was created on 06 Jun 2018 12:21 by VA Supervisor, page 1 of 3.

3. Input a file name and click the **Save** button.

Figure 104: Save As Window in Explorer – Save Button



27. User Provisioning

HSRM employs the process of user provisioning to manage and create accounts. The user provisioning process is implemented via user setup tools, which are restricted to users with elevated security rights.

27.1. Access User Setup Tools

1. Click the **Menu** icon in the top left of the screen to view the menu options available.
2. Select **Tools** from the drop-down menu to expand the **Tools** list and select **User Setup**. The **User Setup** screen appears.

Figure 105: Menu List – User Setup

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139														
First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Q_I	Listen	02/04/1974	666698776	Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Made	Not Allocated	06/07/2018	2
	Find Referral by Patient													***
	Find Referrals													***
	Find Provider	achel	01/01/1965	6666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated	7
	Referral List													***
	Task List													***
	External Search													***
	Reports	achel	01/01/1965	6666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated	7
	Tools													***
	User Setup													***
	atty	10/13/1959	6666981567	Traditional Community Care / Individual Authorization	Cardiology - CathPCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated	7	***

Figure 106: User Setup Screen

User Setup												
Code	Description	Default Logon Location	Security Group	Access Profile	Last Name	Given Name	Care Provider	Facility	Care Provider Type	Active	Logon Date From	Logon Date To
Amy.VanEpps@va.gov	Amy VanEpps	VAMC Cheyenne VA Medical Center	VA Facility Revenue Manager	VA General				Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	05/18/2018	
Antonio.Armstrong2@va.gov	Antonio Armstrong	VAMC Philadelphia VA Domiciliary	VA Facility Community Care Staff	VA Facility Community Care Staff	Armstrong	Antonio		Philadelphia VA Domiciliary		<input checked="" type="checkbox"/>	05/31/2018	
Ashley.Brooks2@va.gov	Ashley Brooks	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff	Brooks	Ashley		Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	05/08/2018	
Aszur.Rollins@va.gov	Aszur Rollins	VAMC Togus VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff	Rollins	Aszur		Togus VA Medical Center		<input checked="" type="checkbox"/>	05/08/2018	
AAP	Auto Allocation Process	Addiction Medicine	xVA Security Group	VA General						<input checked="" type="checkbox"/>	01/01/2017	
Bonnie.Lupo@va.gov	Bonnie Lupo	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff				Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	05/10/2018	
Brent.Andrew@va.gov	Brent Andrew	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff				Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	05/10/2018	

27.2. Search for Users

1. [**Navigate to the User Setup screen.**](#)
2. Click the **Magnifying Glass** icon within each **User Setup** field to view available options.
3. Enter the search criteria in the **User Setup** fields.
4. Click the **Find** button at the bottom right of the screen.

Figure 107: User Setup Screen – Code and Description

The screenshot shows the 'User Setup' screen in the HealthShare Referral Manager. At the top, there are search fields for 'Code' (containing 'ccp') and 'Description' (containing 'community clinician'), both of which are highlighted with a red box. Below these are fields for 'Last Name', 'Given Name', 'Security Group', and 'Access Profile'. To the right, there are filters for 'Care Provider', 'Care Provider Type', 'Facility', and 'Logon Location', each with a search icon. A checkbox for 'Active Logon Date Range' is checked. Below the search area is a table with columns: Code, Description, Default Logon Location, Security Group, Access Profile, Last Name, Given Name, Care Provider, Facility, Care Provider Type, Active, Logon Date From, and Logon Date To. One row is visible in the table, corresponding to the search criteria. At the bottom right of the table are 'New' and 'Find' buttons, with 'Find' also highlighted by a red box.

5. Results appear in the table list.

Figure 108: User Setup Screen – Results List

The screenshot shows the 'User Setup' screen displaying the results of the search. The search fields at the top are identical to Figure 107. The table below lists users matching the search criteria. The columns are: Code, Description, Default Logon Location, Security Group, Access Profile, Last Name, Given Name, Care Provider, Facility, Care Provider Type, Active, Logon Date From, and Logon Date To. The table contains eight rows of user data. At the bottom right of the table are 'New' and 'Find' buttons, with 'Find' highlighted by a red box.

Code	Description	Default Logon Location	Security Group	Access Profile	Last Name	Given Name	Care Provider	Facility	Care Provider Type	Active	Logon Date From	Logon Date To
Amy.VanEpps@va.gov	Amy VanEpps	VAMC Cheyenne VA Medical Center	VA Facility Revenue Manager	VA General				Cheyenne VA Medical Center		✓	05/18/2018	
Antonio.Armstrong2@va.gov	Antonio Armstrong	VAMC Philadelphia VA Domiciliary	VA Facility Community Care Staff	VA Facility Community Care Staff	Armstrong	Antonio		Philadelphia VA Domiciliary		✓	05/31/2018	
Ashley.Brooks2@va.gov	Ashley Brooks	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff	Brooks	Ashley		Cheyenne VA Medical Center		✓	05/08/2018	
Aszur.Rollins@va.gov	Aszur Rollins	VAMC Togus VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff	Rollins	Aszur		Togus VA Medical Center		✓	05/08/2018	
AAP	Auto Allocation Process	Addiction Medicine	xVA Security Group	VA General						✓	01/01/2017	
Bonnie.Lupo@va.gov	Bonnie Lupo	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff				Cheyenne VA Medical Center		✓	05/10/2018	
Brent.Andrew@va.gov	Brend Andrew	VAMC Cheyenne VA Medical Center	VA Facility Community Care Staff	VA Facility Community Care Staff				Cheyenne VA Medical Center		✓	05/10/2018	

6. Navigate the table and click the row of the user. The **Logon Details** screen appears for the user selected.

Figure 109: User Setup Screen – Logon Details

The screenshot shows the 'User Setup' screen with the 'Logon Details' tab selected. The 'Logon Details' section contains fields for Code (ccp), Description (Community Clinician), Password and Confirm Password (both set to '*****'), Security Group (xCommunity Clinical), Access Profile (Community Clinical), Logon Date From (01/02/2017), and Logon Date To (set to the current date). There is also a checkbox for 'Force Change of Password at Next Logon'. The 'Logon Facility' dropdown shows 'Cheyenne VA Medical Center' and 'VAMC Cheyenne VA Medical Center'. A checked checkbox 'Allow Change of Location at Logon' is present. The 'User Type' dropdown is empty. The 'User Details' section shows creation information: Created By (Demo User), Created Date and Time (12/11/2017 14:49), Last Updated By (VA Supervisor), and Last Updated Date and Time (05/14/2018 08:45). At the bottom right are 'Apply' and 'Update' buttons.

27.3. Add Users

1. [Navigate to the User Setup screen.](#)
2. Click the **New** button at the bottom right of the screen.

Figure 110: User Setup Screen – New Button

The screenshot shows the 'User Setup' screen with the 'New' button highlighted by a red box. The 'Logon Details' section contains fields for Code (ccp), Description (community clinician), Last Name, Given Name, Security Group (xCommunity Clinical), Access Profile (Community Clinical), Care Provider, Care Provider Type, Facility, and Logon Location. A checked checkbox 'Active Logon Date Range' is present. Below the form is a table with columns: Code, Description, Default Logon Location, Security Group, Access Profile, Last Name, Given Name, Care Provider, Facility, Care Provider Type, Active, Logon Date From, and Logon Date To. The table shows one row for ccp with values: ccp, Community Clinician, VAMC Cheyenne VA Medical Center, xCommunity Clinical, Community Clinical, and Cheyenne VA Medical Center. At the bottom right are 'New' and 'Find' buttons.

3. Enter the logon details in the mandatory fields, which are denoted by a red asterisk.
4. Click the **Magnifying Glass** icon within each **Logon Details** field to view available options and select the appropriate option.
5. Click the **Apply** button at the bottom right of the screen.

Figure 111: Logon Details Screen – Apply Button

The screenshot shows the 'Logon Details' section of the User Setup Details page. The 'Logon Facility' field contains 'Dermatology'. The 'Allow Change of Location at Logon' checkbox is checked. The 'User Type' field is empty. At the bottom right, there are two buttons: 'Apply' (highlighted with a red box) and 'Update'.

27.4. Manage User Access and Security Profiles

1. [Search for the user.](#)
2. Click the **Magnifying Glass** icon within **Security Group** and **Access Profile** fields to view available options.

Figure 112: Logon Details Screen – User Access and Security Profile

The screenshot shows the 'Logon Details' section of the User Setup Details page. The 'Logon Facility' field contains 'Dermatology'. The 'Allow Change of Location at Logon' checkbox is checked. The 'User Type' field is empty. The 'Security Group' and 'Access Profile' fields are highlighted with a red box. At the bottom right, there are two buttons: 'Apply' and 'Update'.

3. Select the **Security Group** and **Access Profile**.
4. Click the **Apply** button.

Figure 113: Logon Details – Security Group Field, Access Profile Field, and Apply Button

The screenshot shows the 'User Setup Details' screen under 'Logon Details'. It includes fields for Code (Rachael), Description (Hsmr), Password, Confirm Password, Security Group (xCommunity Staff Member), Access Profile (Community Staff Member), Logon Date From (06/06/2018), Logon Date To, Force Change of Password at Next Logon, Logon Facility (Dermatology), Logon Location (Dermatology), Allow Change of Location at Logon (checked), Other Logon Locations, User Type, and two buttons at the bottom: 'Apply' (highlighted with a red box) and 'Update'.

27.5. Add Logon Locations

1. [Search for the user.](#)
2. Check the **Allow Change of Location at Logon** box.

Figure 114: Logon Details Screen – Allow Change of Location at Logon

The screenshot shows the 'User Setup Details' screen under 'Logon Details'. It includes fields for Code (Rachael), Description (Hsmr), Password, Confirm Password, Security Group (xCommunity Staff Member), Access Profile (Community Staff Member), Logon Date From (06/06/2018), Logon Date To, Force Change of Password at Next Logon, Logon Facility (Dermatology), Logon Location (Dermatology), Allow Change of Location at Logon (checked), Other Logon Locations, User Type, and two buttons at the bottom: 'Apply' (highlighted with a red box) and 'Update'.

3. Click the **Magnifying Glass** icon with the **Logon Location** field to view available logon locations.
4. Select the logon location.
5. Click the **Update** icon at the bottom right of the screen to save changes.

Figure 115: Logon Details – Logon Locations

The screenshot shows the 'User Setup Details' page for a user named Amy VanEpps. The 'Logon Details' section contains fields for Code (Amy.VanEpps@va.gov), Description (Amy VanEpps), Password and Confirm Password (both set to '*****'), Security Group (VA Facility Revenue Manager), Access Profile (VA General), Logon Date From (05/18/2018), and Logon Date To (empty). There is also a checkbox for 'Force Change of Password at Next Logon'. The 'Logon Locations' section shows two entries: 'Cheyenne VA Medical Center' and 'VAMC Cheyenne VA Medical Center', with the latter being highlighted by a red box. A checked checkbox 'Allow Change of Location at Logon' is present. The 'User Details' section shows creation information: Created By (VA Supervisor), Created Date and Time (05/18/2018 12:56), Last Updated By (VA Supervisor Cheyenne VA Medical Center), and Updated Date and Time (05/18/2018 12:56). At the bottom right are 'Apply' and 'Update' buttons.

28. Help Desk Support

Starting on August 15, 2018 you will contact the Enterprise Service Desk (ESD) to open tickets for support on HealthShare Referral Manager. The ESD is dedicated to providing excellent customer service and will make every effort to ensure a smooth conversion.

How to open a ticket with Enterprise Service Desk (ESD)

- By phone at 1-855-673-4357 (TTY: 1-844-224-6186)
- Or, by utilizing self-service at <https://yourit@va.gov>

Some things to keep in mind

- The ESD sets priorities for tickets
- Password resets cannot be achieved via self-service; users must contact the service desk by phone

Appendix A: Acronyms and Abbreviations

Table 5: Acronyms and Abbreviations

Acronym or Abbreviation	Definition
CCRA	Community Care Referral and Authorization
CPRS	Computerized Patient Records System
HSRM	HealthShare Referral Manager
OHI	Other Health Insurance
OS	Operating System
PDF	Portable Document Format
RUR	Revenue Utilization Review
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
VA	U.S. Department of Veterans Affairs

Appendix B: Document Type Definitions

Table 6: Document Type Definitions

Document Type	Definition
Legal Document	A document that states some contractual relationship or grants some legal right
Referral Document	A recommendation of a medical or paramedical professional
Medical Document	A document relating to patient care or a medical record
Secondary Authorization Request (SAR)	A request submitted by a community provider who determines additional or continued care outside the scope of the original authorization. This will create a task on the facility community care staff member's task list to review the SAR
REFDOC Packet	The patient referral packet that is uploaded by VA, which includes a 10-0386 or 7078/7079, the Community Care Consult, Required Medical Documents, and the Veteran's Demographics