McKESSON
Empowering Healthcare

STAR 2000™

STAR PATIENT CARE
Release of Information Implementation Guide

Release 17.0
October 2011

C17000441

Copyright notice

Copyright © 2011 McKesson Corporation and/or one of its subsidiaries. All Rights Reserved.

Use of this documentation and related software is governed by a license agreement. This documentation and related software contains confidential, proprietary and trade secret information of McKesson Corporation and/or one of its subsidiaries and is protected under United States and international copyright and other intellectual property laws. Use, disclosure, reproduction, modification, distribution, or storage in a retrieval system in any form or by any means is prohibited without the prior express written permission of McKesson Corporation and/or one of its subsidiaries. This documentation and related software is subject to change without notice.

Publication date

October 2011

Produced in Cork, Ireland

Product and version

STAR 2000 Release 17.0

Publication number

C17000441

Reader comments

Any comments or suggestions regarding this publication are welcomed and should be forwarded to the attention of

STAR 2000 Documentation Team
McKesson
Mail Stop ATHQ-3302
5995 Windward Parkway
Alpharetta, GA 30005

Trademarks

STAR 2000 is a trademark of McKesson Corporation and/or one of its subsidiaries.

Microsoft and Outlook are registered trademarks of Microsoft Corporation.

Zebra, ZebraNet, and ZPL are registered trademarks of Zebra Technologies Corporation.

All other trademarks are the property of their respective owners.

Documentation Conventions

Documentation for McKesson's STAR 2000™ line of products follows these conventions:

Revisions
Text revisions are indicated by a change bar in the left margin. Paragraphs that contain grammatical changes that do not affect content are not marked.

Canadian Documentation
This volume may include documentation for Canadian users of this product. Complete sections of Canadian text are identified by "CN" and "CN Only."

Key Names
Named keys, such as ENTER, SHIFT, CTRL, and ALT, appear in this document in uppercase (capital) letters. Symbol keys display according to the key name, followed by the symbol on the key in parentheses, such as hyphen (-) and asterisk (*).

Key Chords
Key chords are key entries that require you to hold down one or more keys (typically, CTRL, ALT, or SHIFT) before pressing another key. In this document, key chords display as the names of each key in the chord with a hyphen (-) between each (for example, CTRL-ALT-DEL). You should press the keys in the order indicated.

ENTER
ENTER is a key on a computer keyboard used to complete an entry on the STAR system. (This key may also be referred to as NEW LINE or NL in the STAR system.)

Data Entries
Letters or words you enter in response to the system display in **boldface** letters in this document. For example: Enter **Y** for Yes or **N** for No.

Selecting an Entry
This document often instructs you to "select an entry." The method you use to select an entry depends on whether you are using STAR from a terminal or IBM-compatible personal computer. Entry methods include:

- Entering the option number
- Using your arrow keys to highlight the option and pressing ENTER
- Clicking on the option using a mouse or other pointing device (PC only)

For more information about these options, see the *General Information Volume*.

Prompts
System prompts display at the bottom of many STAR screens when the system requests an entry or displays a message. Prompts display in this document italicized and indented from the rest of the text. For example:

Enter patient name--

Field Characteristics
STAR product documentation provides field explanation codes, in addition to a narrative description for each field on a screen. These codes display the maximum length of your entry in the field, the type of entry you make in the field, and whether the field is required. This information displays in the following format:

- DISPLAY ONLY for a field you cannot edit.
- For X-YY-Z field types, where:
  - X is the maximum number of characters permitted in the field:
    - P for a field length determined by a Parameter
    - T for a field length determined by a Table
    - U for a field having an Undefined length
  - YY is the type of entry technique permitted in the field:
    - A for Letters only
    - N for Numerals only
    - C for Characters (including punctuation)
    - AC for Letters and Punctuation only (no numbers)
    - NC for Numerals and Punctuation only (no letters)
    - AN for Letters and Numerals only (no punctuation)
  - Z is the requirement indicator of the field:
    - R if an entry is required to complete the function

      NOTE: Facilities can designate that certain fields be required. STAR product documentation does not display R for fields designated as required by a facility.
    - O if an entry is optional to complete the function
    - C if an entry is conditionally required or optional
  - For YY-Z field types, where YY is:
    - TABLE LOOKUP for a field that enables you to select from a displayed table. See the *General Information Volume* for more information regarding this entry technique.
    - SPECIAL FORMAT for a field having data entry requirements not conforming to standard format. The field definition contains the specific data entry requirements for the field.
    - DATE for a field subject to the date entry conventions described in the *General Information Volume*.
    - TIME for a field subject to the time entry conventions described in the *General Information Volume*.

    NOTE: For use of the Z position in this format, refer to the explanations for Z under X-YY-Z.

Table of Contents

Introduction

Releasing healthcare information is a function of the Health Information Management (HIM) department in most hospitals. Hospitals receive requests for patient information from many sources for many reasons. This Release of Information Module provides functionality to process requests for releasing healthcare information (including all data capture pertaining to the request), changing the status of the request, printing reports, billing for completed requests, posting payments, and tracking healthcare information disclosures.

The module is integrated with the following:

- STAR Master Patient Index (MPI) for easy access to patient demographic data
- STAR GUI Chart Management to provide the chart location and deficiency information to users while in the Release of Information functions
- STAR Patient Processing to provide the HIPAA Privacy Opt Outand Confidentiality information that was entered during the Admission process

Though release of information is usually performed in the HIM department, the STAR Release of Information Module is free-standing and is not dependent upon STAR Medical Records; thus, it may be used in facilities that are not using STAR Medical Records.

For information on purchasing this module, contact your McKesson sales representative.

INFORMATION REQUESTS

The Release of Information Module allows users to

- add, edit, and view requests for information
- track the status of requests for information (requests can be logged, pended, unpended, denied, canceled, or completed)
- bill for requested records
- keep a record of requests completed and documents released

You can select the entire chart to be copied or can enter the individual documents that have been requested. The number of pages copied can be entered and is used in productivity reporting and in calculating the billing amounts for invoicing. Requests can be included for the Accounting of Disclosures reporting that is provided at the patient's request if the request meets the hospital's policy for disclosure of information.

The Release of Information by Requester function allows rapid entry when a requester requests the same information for multiple patients/visits. You can enter all the requests at once, instead of having to enter each one individually.

The Release of Information Work List displays the requests that match selected criteria. It allows for user-defined prioritization and sorting of requests for processing. It can be used to directly access requests for processing and can be printed and used as a pull list.

DISCLOSURES

HIPAA legislation effective April 2003 provides that patients can request a list of everyone to whom their healthcare information was given, for purposes other than treatment, payment or healthcare operations. Hospitals are required to provide such a listing to the patients within 60 days of their request. This list is referred to in the HIPAA Privacy Rule as a tracking or accounting of disclosures.

Even though the hospitals are not required to track disclosures of information for purposes of treatment, payment, or healthcare operations, many hospitals may elect to track these types of disclosures. STAR's Release of Information Module allows a hospital to track any disclosures of patient-specific healthcare information.

The Disclosure Tracking function provides the ability to add or edit disclosures of information and can be used in ancillary areas as well as in the HIM department. Multiple accounts can be chosen when adding a disclosure. This generates a disclosure for each account selected with the following detail:

- the requester or organization that received the information
- the information that was disclosed
- the purpose and method of the disclosure

Disclosures are included on the Accounting of Disclosures report when generated unless the disclosure was flagged to be suspended from the report. Disclosures have no billing associated with them and are used solely for tracking and reporting purposes.

REPORTS AND LETTERS

The Release of Information Reports function provides access to the following productivity, disclosure, and financial reports that can be printed to a STAR printer, displayed online, or exported to another PC application:

- Accounting of Disclosures Report*
- Accounts Receivable Billing Report*
- Average Turn Around Times Report*
- Balance Adjustments Report*
- Charge Adjustments Report*
- Completed Requests Summary Report
- Disclosure Tracking Summary Report*
- Financial Activity Report*
- Incomplete Requests Summary Report*
- Pre-Pay Status Report*
- Requests Processed Summary Report*
- Total Payments Report*

NOTE: You can use the STAR Audit Service to audit user requests for reports followed by an asterisk (*). The Audit Service collects and stores information such as report request date and time, the name of the user requesting the report, and the criteria selected for the report. For more information, see the *STAR Audit Service Reference Guide*.

In addition, the following letters, notices, and labels can be printed:

- billing notices (30, 60, or 90 days past due)
- denied notice
- pending notice
- request cover letter
- requester address labels
- return address labels

Also, up to 16 user-defined letters can be generated on demand.

Chapter 1 - IMPLEMENTATION

INTRODUCTION

This chapter contains information on steps that need to be performed to set up the Release of Information Module at your facility.

MCKESSON IMPLEMENTATION STEPS

Before beginning the implementation, verify that the customer has purchased the Release of Information Module. Then perform the following steps in the order they are listed to implement the Release of Information Module.

NOTE: If STAR Patient Care is in the network, then the Patient Care CPU **must** be the ROI Master CPU. If STAR Patient Care is not in the network, then the ROI Master CPU can be any CPU in the network.

STI M19819 Load

Load STI M19819, which initiates the necessary conversions to run automatically.

Tilde Setup

Perform the following steps to set up the tildes (~) on each CPU:

1. On each CPU and ID in the network, insert lowercase **r** in the first piece of parameter code ~A.

2. On each CPU and ID in the network, insert lowercase **r** in the third piece of ~CF(Y%) for those facilities who have purchased the Release of Information Module.

3. From the DME, initiate the tildes by entering the following, **D PRM^AFINT**.

4. The Return Address Label table is split by facility. From the DME, enter **D TBL^AFINT** to set ~CT with the facility-split table types.

Automatic Conversion

When the STI is loaded, a conversion runs that assumes that if STAR Patient Care is installed, then STAR Patient Care is the ROI Master CPU. If STAR Patient Care is not installed, then the CPU that the conversion is running on is the ROI Master (and only) CPU. The conversion does the following:

- defines the Release of Information network type code, which consists of setting the following nodes: ^Q("NTP",,"r")="r:Release of Information", ^Q("NTP","A","Release of Information")="r:"Release of Information"

- adds PHI to the visit keys in Midnight Processing Run Control to indicate retention of disclosure tracking data

- defines the table types as defined in base if the ROI Table types do not already exist

- populates several ^V tables with entries from base if the tables do not already include entries. These tables include the following:
  - ROI Document Type
  - ROI Method of Payment
  - ROI Purpose of Disclosure
  - ROI Reasons
  - ROI Requester Type
- populates the following user defined letters with the base letter text for letters that are not already defined:
  - ROI Denial Letter
  - ROI Pending Request Letter
  - ROI Cover Letter
  - ROI Billing Notice > 30
  - ROI Billing Notice > 60
  - ROI Billing Notice > 90
- defines network applications for Release of Information on the STAR Patient Care CPU. If the ROI network application is not already defined, set it up to be the same as STAR Patient Care. The node created is ^CT(,"IPL","~CCNP("r")")=CPUs, where CPUs is equal to the CPU list taken from the STAR Patient Care application. A lowercase **r** is then inserted into the third piece (network destination processor codes) of each of those CPUs.
- creates two VT modules (AROIPHIO and AROIPHII) on CPUs other than STAR Patient Care. These jobstarts enable the Disclosure Tracking GUI Application to run on CPUs other than STAR Patient Care.
- creates two form types (for each facility) for the production of labels from the ROI products. The two form types are associated with forms that can be used with Zebra® printers. If the customer is not using Zebra printers, these form types must be edited. The form types that are defined are as follows:
  - AROILT - ROI Requester Label. This form type is automatically associated with the Zebra label form arflblt.

- AROILF - ROI Address Label. This form type is automatically associated with the Zebra label form arflblf.

• defines the ROI FAX Report definition for each facility if it does not already exist and directs it to the printer definition HSP

Networking Setup

Networking is set up in the conversion that runs automatically when the STI is loaded. If Release of Information is purchased and implemented at a site that has a CPU configuration with multiple CPUs but no Patient Care, the network setup may need to be manually adjusted.

Validation of Release of Information Menus

1. Verify that base menu **armmain** contains the following menu library elements:

AROI	Release of Information Request
AROIWL	Release of Information Work List
AROIREQ	Release of Information by Requester
AROIDIS	Disclosure Tracking
AROIRPT	Release of Information Reports

2. Verify that base menu **armaint** contains the following menu library elements:

AROISYS	ROI Facility Parameters
AROIUSP	ROI User Security Parameters
ARTABLE	ROI Table Maintenance
AROILETTERS	ROI Letter Maintenance

Verification of Standard Tables

Verify that the following five standard tables are present in ROI Table Maintenance and that they contain McKesson-provided codes and descriptions. The entries in these tables are present to give customers an idea of what type of entries can be entered in each table. Customers can add additional entries for each table.

• RDT - ROI Document Type

• RMD - ROI Method of Payment

• RPD - ROI Purpose of Disclosure

• RRS - ROI Reasons

- RTP - ROI Requester Type

If the Release of Information Module is being implemented in multiple facilities and the hospital decides to split any of these tables, a McKesson technical resource needs to copy the standard table values using global utilities.

NOTE: The standard table values are stored in global ^V.

Definition of Form Types for Labels

The base Release of Information software includes four forms and two form types for labels (two forms and one form type for return address labels and two forms and one form type for requester labels). These must be set according to the type of printer that the facility is using.

Type of Printer	Type of Label	Form Z Block	Form Type
Zebra	Return Address	arflblf	AROILF
	Requester	arflblt	AROILT
Non-Zebra	Return Address	arflblh	AROILF
	Requester	arflblr	AROILT

See “Automatic Conversion” on page 1-4 for more information on the form types.

Zebra Label Printers

STAR Release of Information supports ZPL® (Zebra Programming Language) enabled Zebra series Z, DA, and S printers.

Customers should estimate the expected label output volume for each printer and work with their Zebra printer representative to select the printer appropriate for their needs.

NOTE: You must also use the ZebraNet® II Print Server with these printers. The ZebraNet II Print Server is an external print server that uses a parallel interface and connector to attach the server to the supported Zebra printers. It is the only print server certified for use with STAR Release of Information.

Label Media

Release of Information labels print on **die cut** labels 3.5 inches wide by 1 inch long.

CUSTOMER IMPLEMENTATION STEPS

Perform the following steps in the order they are listed to implement the Release of Information Module.

Install STAR Navigator

Install STAR Navigator on each PC that will be using the Release of Information Module. Be sure that the checkbox for the Release of Information Module is checked when STAR Navigator is loaded.

The *STAR Navigator User's Guide* provides the MIS department and end users with information needed to install, use, and support STAR Navigator. Use the guide for instructions for installing and setting up STAR Navigator software, an overview of the most commonly-used functions, and troubleshooting information. For information about WEM, refer to the *WEM User's Guide* or WEM Online Help.

Build the Release of Information Department

Build the Release of Information Department in the Base Navigator Department table. This step is optional.

Build the Release of Information Navigator View(s)

You can build Navigator Views in a variety of ways. You can add the base menus to existing STAR Navigator Views.

Other considerations to keep in mind regarding the assignment of menus are the employee's job responsibilities. The job responsibilities will be the biggest guide in deciding what menu options to place on a particular Navigator View.

See “Validation of Release of Information Menus” on page 1-6 for a list of the base menus. Keep in mind that if modifications need to be made, custom menus can be built by a STAR Forms/Menus-certified person at the facility.

Chapter 2 - PARAMETERS

INTRODUCTION

ROI Parameters are used to control access to and use of the Release of Information Module. These parameters are hospital defined and not controlled by McKesson.

Parameters are available, based on menu access, to define the use of features within the Release of Information Module. Some parameters are defined at a facility level, while others are defined by employee. You should define the ROI Facility Parameters before you define the ROI User Security Parameters.

ROI FACILITY PARAMETERS

ROI Facility Parameters are used to set up invoice numbers, a batch label printer, an Accounting of Disclosure reminder message, and text for invoices. You can also indicate if the *Add to Requester Table* checkbox is checked automatically when a free-form requester is entered on the Add/Edit Requester form.

In a multi-facility environment, these parameters must be set for each facility that has purchased the Release of Information Module.

When you select ROI Facility Parameters from the ROI Maintenance menu, the following screen is displayed:

```
                General Hospital ROI Facility Parameters Processor
                                             Sat Sep 11, 2004 04:50 pm

 1 Last Invoice      2 Add Requesters Default     3 Batch Label Printer
   126                 Yes
 4 A.O.D Reminder Message
   A.O.D. reports are to be given to patients only.
 5 Edit By                      6 Edit Date
   Goolsby,John W                 04/21/03 1520









Enter field number or '/' starting field number--
```

Field Explanations

1. LAST INVOICE (10-N-O)

Enter a number of up to 10 digits to be used to automatically generate an invoice number. The next invoice number is determined by adding a 1 to this number. This field is updated each time an invoice number is generated to reflect the last number assigned.

2. ADD REQUESTERS DEFAULT (1-A-O)

Enter **Y** for Yes or **N** for No to indicate if the *Add to Requester Table* checkbox is checked automatically when a free-form requester is entered on the Add/Edit Requester form. If No is entered in this field or the field is blank, the checkbox is **not** checked automatically when the Add/Edit Requester screen is displayed for free-form requesters.

NOTE: You may want to have a policy to review new entries to the table to eliminate duplicates. Also, keep in mind that free-formed entries (that is, those that are not added to the table) cannot be selected for individual reporting (such as in the Disclosure Tracking Summary and Accounts Receivable Report), but they are included when **Include All Entries** is selected for the reports.

3. BATCH LABEL PRINTER (TABLE LOOKUP-O)

Specify in this field the appropriate report name (which is associated with a printer in Reports Maintenance of Spooler Management) to be used for printing labels generated in batch mode ("from" labels and address labels generated from billing notices) from the Release of Information Module. You can enter the report code directly if you know it, or enter a hyphen (-) and select from the Spooler Reports that are displayed.

NOTE: This field is used only if a printer is not defined in the ROI Label Printer field of the CRT Names table for the user's CRT. If neither of these fields is defined, label generation from within the application is disabled.

4. A.O.D. REMINDER MESSAGE (50-C-O)

Enter a 50-character reminder message for Accounting of Disclosures. This message is displayed when a request is entered that has:

- a billing type with the AOD Ind field set to Yes and
- a requester type with the Patient field set to Yes.

You can use this field to indicate your facility's policy on Accounting of Disclosures. A sample message might be *A.O.D. Reports can be requested only by patients*.

5. EDIT BY (DISPLAY ONLY)

The system displays the name of the person who last updated this screen.

6. EDIT DATE (DISPLAY ONLY)

The system displays the date and time that the screen was last updated.

ROI INVOICE PARAMETERS

The ROI Invoice Parameters determine if a detailed or summary invoice is generated when an invoice is printed or faxed. You can also indicate if a payment stub and any facility-defined text are included on the invoice. For a detailed invoice, you can specify what fields (for specific charges) are included on the invoice.

When you select ROI Invoice Parameters from the ROI Maintenance menu, the following screen is displayed:

```
                  General Hospital ROI Invoice Parameters Processor
                                                Sat Sep 11, 2004 05:06 pm

 1 Print Detail or Summary  2 Detail Print Option       3 Print Payment Stub
   Detail                     Entries Defined             Yes
 4 Invoice Text             5 Edit By                   6 Edit Date
                              Farmer,Douglas              09/01/04 1613


    |ROI FACILITY PARAMETERS                                                   |
    |INVOICE TEXT FOR FACILITY A                                               |
    |2                                                                         |
    |3                                                                         |
    |4                                                                         |
    |5                                                                         |
    |6                                                                         |
    |7                                                                         |
    |                                                                          |
    |                                                                          |



Enter field number or '/' starting field number--
```

Field Explanations

1. PRINT DETAIL OR SUMMARY (1-A-R)

Indicate if a detailed or summary invoice is generated when an invoice is printed or faxed. Enter **D** for detailed or **S** for summary. The default is D. The summary invoice includes only the total amount charged for the records, while the detailed invoice includes a breakdown of the charges, using the specific fields indicated in the Detail Print Option field (for example, base charge, preparation charge, certification charge, etc.).

2. DETAIL PRINT OPTION (SPECIAL FORMAT-O)
This field determines which fields are included on the detailed invoice. When you access this field, the following subscreen is displayed:

```
                    General Hospital ROI Invoice Parameters Processor
                                                               Sat Sep 11, 2004 05:14 pm
Detail Invoice Print Options
( 1)Requester            : Yes
( 2)Invoice Number       : Yes
( 3)Accounts Copied      : Yes
( 4)Base Charge          : Yes
( 5)Preparation Charge   : Yes
( 6)Certification Charge : Yes
( 7)Microfilm Fee        : Yes
( 8)Charge Adjustment Amt : Yes
( 9)Charge Adjustment    : Yes
(10)Postage/Shipping     : Yes
(11)Sales Tax            : Yes
(12)Payment Posted       : Yes
(13)Right Justify        : No






Enter field number or '/' starting field number--
```

For fields 1-12, enter **Y** for Yes to include this information on the invoice. Enter **N** for No, and the information is not included. The default is Yes.

For field 13, Right Justify, enter **Y** for Yes to right justify the fields that are included on the detailed invoice. Enter **N** or leave the field blank, and the fields are left justified.

3. PRINT PAYMENT STUB (1-A-O)
Indicate if a payment stub should print at the bottom of the invoice. Enter **Y** for Yes or **N** for No. The default is Yes.

4. INVOICE TEXT (SPECIAL FORMAT-O)
When this field is accessed, a text editor is displayed for you to enter comments that print on the invoice. The text editor allows 8 lines of text, with 70 characters per line.

Function keys are available on this screen to help with formatting the text. The following describes each function key:

Key	Function
F1	Deletes the line that the cursor is on.
F2	Inserts a line above the line you are on.
F3	Centers the line that the cursor is on.
F4	Ends the transaction and exits the Label Text field.
F5	Saves the line that the cursor is on.

Key	Function
F6	Copies the saved line to the line on which the cursor is presently residing.
F7	Aligns paragraph so that it is left and right margin justified.
F10	Provides information regarding other keys on the keyboard and their role in the text processor.

For more information on this text editor, see the discussion of the Bulletin Board in Chapter 5: Universal Functions in the *General Information Volume*.

5. EDIT BY (DISPLAY ONLY)

The system displays the name of the person who last updated this screen.

6. EDIT DATE (DISPLAY ONLY)

The system displays the date and time that the screen was last updated.

ROI USER SECURITY PARAMETERS

The parameters defined in ROI User Security Parameters are specific to each ROI user. These parameters determine if the user can perform certain functions in the Release of Information Module, such as posting payments and adjustments, suspending Accounting of Disclosure requests, and adding/editing requests. When defining each user's parameters, you should consider how job responsibilities are divided among employees. You may also want to discuss the settings for some fields, such as the A.O.D. Suspend and Disclosure Tracking Security, with your HIPAA Privacy Officer.

When this option is selected, the system displays the following prompt:

Enter Application code or `-` for list [C]-- |

Enter the application code for the user whose parameters you are setting, or you can press hyphen (-) to see a list of all application codes and make your selection from the list. This is necessary because the Disclosure Tracking function can be accessed from STAR Laboratory, STAR Radiology, STAR Pharmacy, and STAR Financials, and the user parameters must be defined for each application signon.

Once the application is selected, the employee must be selected (the selection is made from employees that are built in the Hospital Employee File for that application). After selection of an employee, the ROI User Security Parameters is displayed as follows:

```
              General Hospital ROI User Security Parameters Processor
                                                    Mon Apr 28, 2003 02:17 pm

 1 Emp ID      2 Name                                    3 Department
   30747         Oliver,Mary                               10 MEDICAL RECORDS
 4 Post Payments        5 Adjustments
   Yes                    Yes
 6 A.O.D. Suspend  7 Disclosure Tracking Security
   Yes               All
 8 Add/Edit Requests         9 Add Requesters       10 Print Reports
   Yes                         Yes                     Yes
11 Edit By                  12 Edit Date            13 App Code
   Oliver,Mary                 04/17/03 1730           C






Enter field number or '/' starting field number--
```

Field Explanations

1. EMP ID (DISPLAY ONLY)
The system displays the employee ID as entered/selected at the initial prompt.

2. NAME (DISPLAY ONLY)
The system displays the name of the employee entered/selected at the initial prompt.

3. DEPARTMENT (DISPLAY ONLY)
The system displays the department associated with the employee ID.

NOTE: This field must be set correctly for the Disclosure Tracking Security field to work properly when set to Department. You cannot edit the field on this screen, but you can change the employee's department in the Hospital Employee File > Create/Edit Personnel Records > Department field.

4. POST PAYMENTS (1-A-O)
Enter **Y** for Yes or **N** for No to indicate if the user is allowed to post payments for ROI requests.

There is no default for this field, but if left blank, then the user cannot post payments.

5. ADJUSTMENTS (1-A-O)
Enter **Y** for Yes or **N** for No to indicate if the user is allowed to postcharge adjustments and payment adjustments for ROI requests.

There is no default for this field, but if left blank, then the user cannot post adjustments.

6. A.O.D. SUSPEND 1 (1-A-O)
Enter **Y** for Yes or **N** for No to indicate if the checkbox *Suspend for Accounting of Disclosure Report* is displayed on the Disclosure Tracking form for this user.

Healthcare providers have the right to suspend (or suppress) a disclosure from appearing on the Accounting of Disclosures Report for a period of time (for example, pending legal investigations or in a potential abuse situation).

Consider what types of disclosures this user will be entering when setting this field. He or she may need access to the *Suspend...* checkbox so that those disclosures are not included on the Accounting of Disclosures Report. As another example, you might have a manager review the Accounting of Disclosures Report before it is provided to the patient, so only that manager would need to suspend entries.

If this field is blank or contains No, the *Suspend for Accounting of Disclosure Report* checkbox is not displayed for this user.

7. DISCLOSURE TRACKING SECURITY (1-A-O)
This parameter controls what disclosures are displayed when this user accesses the Disclosure Tracking Module. When you access this field, the following prompt is displayed:

Allow user(U), department(D) or all(A) security for disclosure tracking-- |

You have the following options:

- Enter **U**, and the user can see only disclosures that he or she has entered.
- Enter **D**, and the user can see all disclosures entered by his or her department. A department must be defined for the user in Hospital Facility Options > Create/Edit Personnel Records > Department field.
- Enter **A**, and the user can see all disclosures, regardless of who entered them.

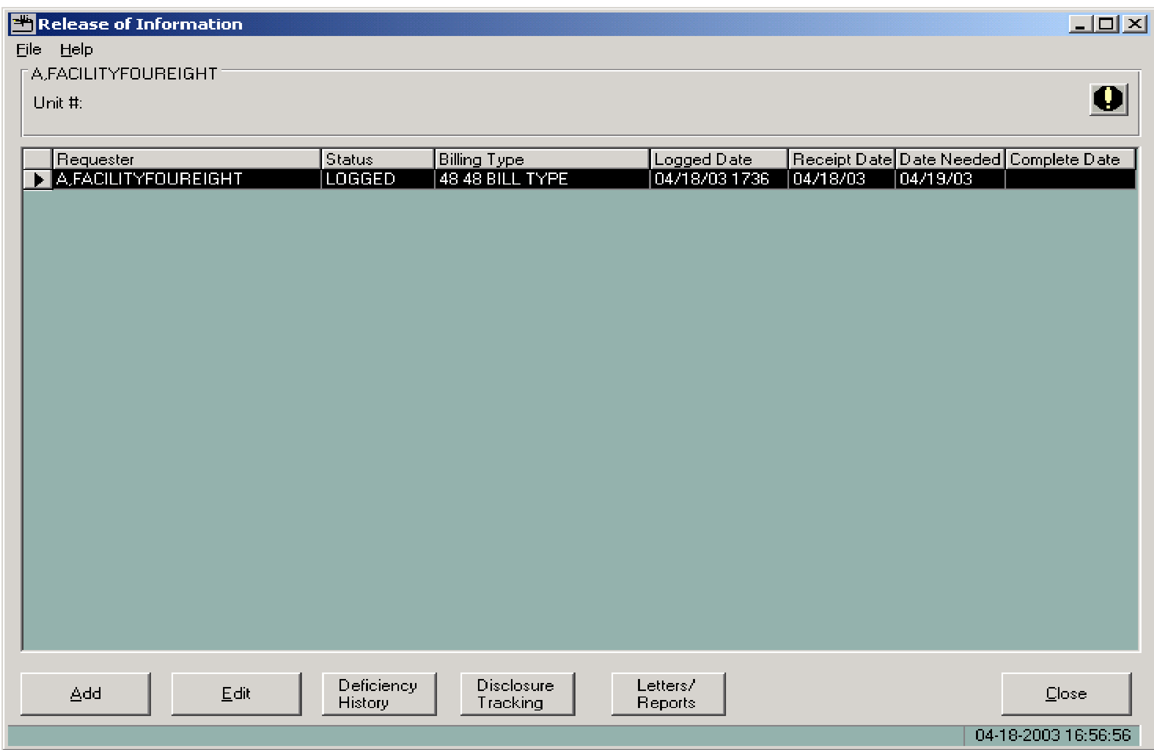
If this field is blank, all disclosures are displayed for the user.

8. ADD/EDIT REQUESTS (1-A-O)

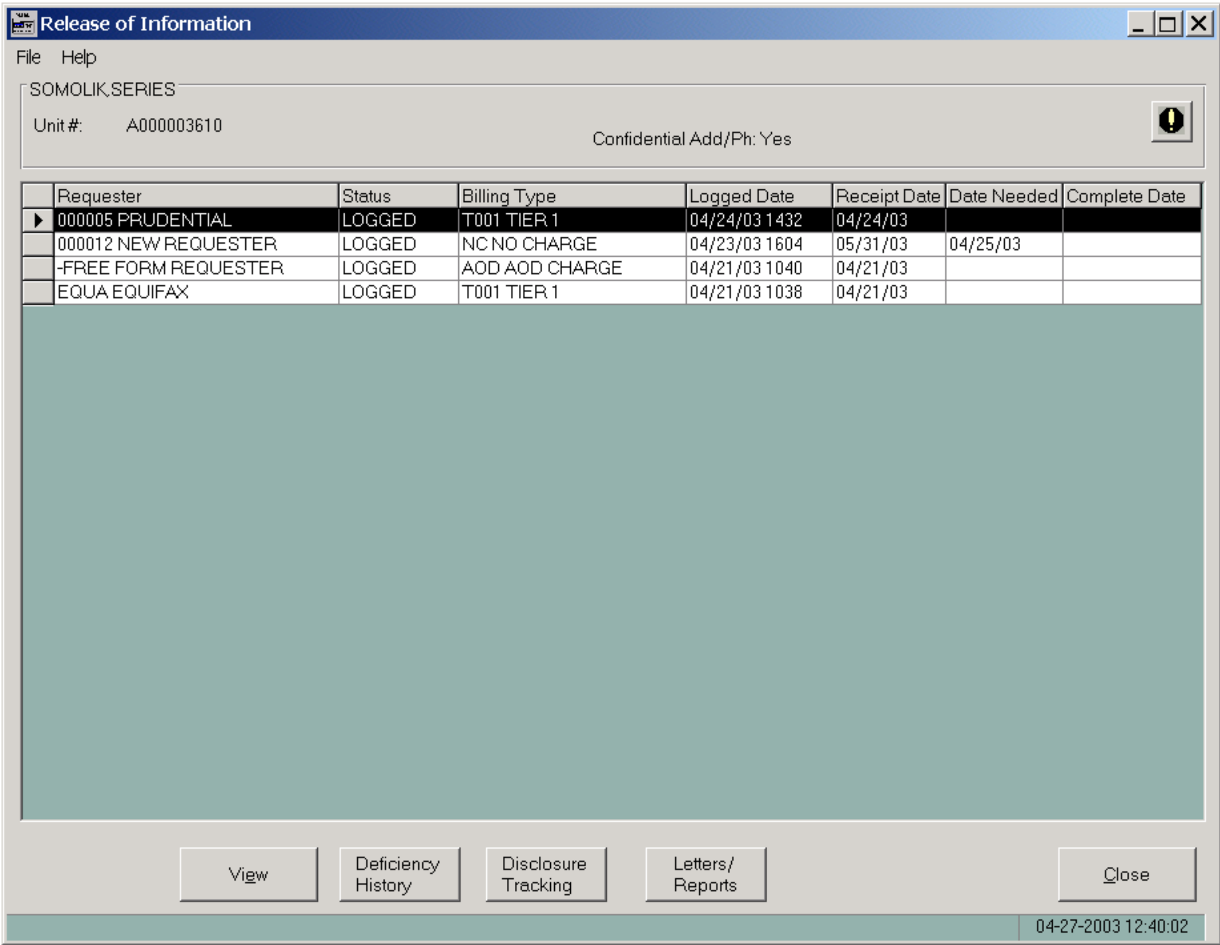
Enter **Y** for Yes if the user is allowed to add and edit information requests in the Release of Information Module. Enter **N** for No to allow the user view-only capability.

Consider the user's job responsibilities when setting this field. If the user will enter new requests or complete existing requests, set this field to Yes. If the user needs only to check the status of requests, set this field to No.

Following is a sample of the Release of Information Summary screen when this field is set to Yes. The options for Add and Edit are included on the screen:



Following is a sample of the Release of Information Summary screen when this field is set to No or is blank. The options for Add and Edit are not displayed; instead a View option is displayed:



9. ADD REQUESTERS (1-A-O)

Enter **Y** for Yes or **N** for No to indicate if this user is allowed to add free-form requesters to the Requester table from within the Release of Information Request function. When a free-form requester is entered in the Release of Information Module, an *Add to Requester Table* checkbox is displayed at the bottom of the Add/Edit Requester form.

If this field is set to Yes, the checkbox is accessible, and users can add requesters to the Requester table by clicking it. If this field is left blank or set to No, then the user cannot add requesters to the Requester table because the checkbox is inaccessible.

10. PRINT REPORTS (1-A-O)

Enter **Y** for Yes or **N** for No to indicate if this user is allowed to print Release of Information reports. If this field is set to No or is blank, the Reports tab cannot be accessed by this user.

11. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this parameter entry.

12. EDIT DATE (DISPLAY ONLY)
The system displays the date and time that the parameter was last updated.

13. APP CODE (DISPLAY ONLY)
The application code for this employee that was entered at the initial prompt is displayed and cannot be edited.

Chapter 3 - TABLES

INTRODUCTION

This chapter contains a listing and explanation of the tables used by STAR Release of Information. Each table is presented with its purpose, the screen or screens used in completing it, and a detailed explanation of the screen fields involved.

Once the fields in a table are completed, you have the option of accepting or editing the screen. If you accept the screen, the transaction is complete.

Table Build Order

Build the Release of Information tables in the following order. Some tables must be built first so that entries are available in tables that are dependent upon those tables:

- ROI Requester Type
- ROI Billing Type
- ROI Requesters
- ROI Authorization Type
- ROI Disclosure Information
- ROI Disclosure Method
- ROI Document Type
- ROI Method of Payment
- ROI Purpose of Disclosure
- ROI Reasons
- ROI Return Address Labels
- CRT Names (Make sure that printers are defined in fields ROI Letter Printer and ROI Label Printer.)

Pre-Built Tables

The following tables have codes and descriptions included in them in the base software:

- ROI Document Type
- ROI Method of Payment

- ROI Purpose of Disclosure
- ROI Reasons
- ROI Requester Type

You can edit or delete the pre-built codes and add codes to these tables as needed by your facility.

CRT NAMES TABLE

Two fields, ROI Letter Printer and ROI Label Printer, on the fourth screen of the CRT Names table are specific to the Release of Information Module:

```
                       General Hospital Table Maintenance Processor
                                                   Wed Aug 25, 2004 10:38 am
CRT Names
 1 Code         2 CRT Name                    3 Restricted Station
   1E             1 EAST CRT                    Entries Defined
 4 Restricted Pat Type    5 Opt-Out           6 Patient Type Groups
   Entries Defined          No                  I Inpatient
 7 Privileged Ind      8 Table Maintenance    9 Census Access
   No                    Entries Defined        Entries Defined
10 Elective Adm List            11 NPIIR
                                   Defined
12 Contract Classification                   13 Include/Exclude

14 ROI Letter Printer         15 ROI Label Printer






Enter field number or '/' starting field number--
                       next(/) or previous screen(/P) [/]
```

Selected Field Explanations

14. ROI LETTER PRINTER (TABLE LOOKUP-O)
Specify in this field the appropriate report name (which is associated with a printer in Reports Maintenance of Spooler Management) to be used for printing letters and invoices generated from the Release of Information Module. You can enter the report code directly if you know it, or enter a hyphen (-) and select from the Spooler Reports that are displayed.

If defined, letters and invoices generated from within the Release of Information application print to the printer associated with the report selected. If this field is blank, letters and invoices print to the default printer for the CRT.

15. ROI LABEL PRINTER (TABLE LOOKUP-O)
Specify in this field the appropriate report name (which is associated with a printer in Reports Maintenance of Spooler Management) to be used for printing labels generated from the Release of Information Module. You can enter the report code directly if you know it, or enter a hyphen (-) and select from the Spooler Reports that are displayed.

If defined, Return Address Labels generated from within the Release of Information application print to this printer. If this field is blank, the system uses the Batch Label Printer defined in ROI Facility Parameters. If neither of these fields is defined, label generation from within the application is disabled.

NOTE: This field overrides the entry in the Batch Label Printer in ROI Facility Parameters.

ROI AUTHORIZATION TYPE

The ROI Authorization Type is used on the Request Detail tab when a request is entered. It indicates the type of authorization (consent) for the specific request. Some examples are General, Psych, or Chemical Dependency.

After the ROI Authorization Type table is selected, the system prompts you to enter an ROI authorization code. You can enter a code of up to 4 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                  Wed Mar 26, 2003 12:21 pm
ROI Authorization Type
( 1)Code         : GEN
( 2)Description  : GENERAL

( 3)Edit by      : Watson,Amy
( 4)Edit date    : 03/26/03 12:21pm









Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (up to four characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)
Enter the description for this authorization type code. You can enter up to 19 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI BILLING TYPE

The ROI Billing Type is entered on the Request Detail tab when a request is entered, and the type is displayed on the Billing tab. Billing Types define the charges that requesters are billed when requests are filled. Some billing types that McKesson recommends are AODN - AOD No Charge, AODC - AOD Charge, NC - No Charge, and VO - View Only:

- **AODN - AOD No Charge:** This billing type is used when the hospital supplies the Accounting of Disclosure Report to the patient at no charge. When the A.O.D. Indicator field of the ROI Billing Type table is set to Yes and the Patient field of the Requester Type table is set to Yes, the AOD Reminder Message is triggered. The message is built in the ROI Facility Parameters, A.O.D. Reminder Message field.

- **AODC - AOD with Charge:** This billing type is used when the hospital charges the patient for the Accounting of Disclosure Report. When the A.O.D. Indicator field of the ROI Billing Type table is set to Yes and the Patient field of the Requester Type table is set to Yes, the AOD Reminder Message is triggered. The Flat Charge field contains a dollar amount if a flat fee is charged by the facility.

NOTE: Having the above entries in the ROI Billing Type table enables AOD requests to be logged and users to know when the AOD Reports were released to patients (using the History tab). The HIPAA Privacy Rule allows a patient to receive one free Accounting of Disclosure Report per year. You should consider your hospital's policy on charging patients for AOD Reports and build Billing Types accordingly. Your hospital may charge the patient for subsequent AOD Reports within a year or may always provide the AOD Report to patients free of charge.

- **NC - No Charge:** This billing type is used if information is disclosed/released and no billing is required. For example, if the facility has a requester such as the Department of Vital Statistics that requires information to be reported (such as births and deaths), this bill type can be used when building the requester.

- **VO - View Only:** This entry is used if a requester comes to the department to view records (that is, no records are copied). You can enter a fee in Flat Charge or Preparation fields that should be charged to a requester for compiling records.

Once billing types are established, you can assign them to requesters in the Requester table.

After the ROI Billing Type table is selected, the system prompts you to enter an ROI billing type code. You can enter a code of up to 4 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
               General Hospital ROI Table Maintenance Processor
                                                  Tue May 27, 2003 12:29 pm
ROI Billing Type
 1 Code  2 Description         3 Edit By          4 Edit Date         5 App Cd
   AODC    AOD WITH CHARGE       BRADLEY,MARY       05/23/03 0950       C
 6 Charge Type       7 Flat Charge       8 Additional Per Page
   Flat                 25.00
 9 Tiered Charge 1  10 Tiered Pages 1   11 Tiered Charge 2  12 Tiered Pages 2

13 Tiered Charge 3  14 Tiered Pages 3   15 Tiered Charge 4

16 Minimum Fee      17 Research         18 Preparation      19 Certification

20 Microfilm        21 A.O.D. Ind       22 Postage          23 Tax Rate
                       YES





Enter field number or '/' starting field number--
```

Field Explanations

1. BILLING CODE (DISPLAY ONLY)
The alphanumeric code (up to four characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)
Enter the description for this billing type code. You can enter up to 19 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date and time that the table entry was last updated.

5. APP CD (DISPLAY ONLY)
The system displays the application code for the user who added or edited this billing type.

6. CHARGE TYPE (1-A-R)
Enter **F** for a Flat charge type or **T** for a Tiered charge type.

NOTE: Tiered charging allows you to automatically apply a discount to requests that include a large number of pages. Following are sample entries and a sample calculation for you to use when completing the Tiered Charge/Tiered Pages fields:

Tiered Charge 1:	$2.00
Tiered Pages 1:	10
Tiered Charge 2:	$1.50
Tiered Pages 2:	20
Tiered Charge 3:	$1.00
Tiered Pages 3:	20
Tiered Charge 4:	$0.50

The charge for a request containing 100 pages is calculated as follows: ($2.00 x 10 pages) + ($1.50 x 20 pages) + ($1.00 x 20 pages) + (0.50 x 50 pages) = $20.00 + $30.00 + $20.00 + $25.00 = $95.00.

7. FLAT CHARGE (7-N-O)

Enter the flat fee dollar amount to charge for requests that use this billing type. Requesters are charged the amount in this field + the amount in the Additional Per Page field (if any) x the number of pages.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

NOTE: If **T** is entered in the Charge Type field, this field cannot be accessed.

8. ADDITIONAL PER PAGE (7-N-O)

Enter the amount per page to be added to the flat fee for requests that use this billing type. The amount entered in this field is multiplied by the number of pages copied for the request, which is then added to the Flat Charge to calculate the total that the requester is billed.

Do not enter a decimal point when making your entry. To enter $1.00, enter **100**. If you enter 1, 1 cent (.01) is entered in this field. You can enter up to $99,999.99.

NOTE: If **T** is entered in the Charge Type field, this field cannot be accessed.

9. TIERED CHARGE 1 (7-N-O)

Enter a **per page** amount in this field, which is used in conjunction with the Tiered Pages 1 field. The amount entered in this field, the Tiered Charge 1 field, is multiplied by the number of pages in the Tiered Pages 1 range and then added to the other tiered charge calculations to determine the total charge billed for the request.

Do not enter a decimal point when making your entry. To enter $1.00, enter **100**. If you enter 1, 1 cent (.01) is entered in this field. You can enter up to $99,999.99.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

10. TIERED PAGES 1 (4-N-O)
Enter the maximum number of pages (up to 9,999) to which the Tiered Charge 1 applies.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

11. TIERED CHARGE 2 (7-N-O)
Enter a **per page** amount in this field, which is used in conjunction with the Tiered Pages 2 field. The amount entered in this field, the Tiered Charge 2 field, is multiplied by the number of pages in the Tiered Pages 2 range and then added to the other tiered charge calculations to determine the total charge billed for the request.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

12. TIERED PAGES 2 (4-N-O)
Enter the maximum number of pages (up to 9,999) to which the Tiered Charge 2 applies.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

13. TIERED CHARGE 3 (7-N-O)
Enter a **per page** amount in this field, which is used in conjunction with the Tiered Pages 3 field. The amount entered in this field, the Tiered Charge 3 field, is multiplied by the number of pages in the Tiered Pages 3 range and then added to the other tiered charge calculations to determine the total charge billed for the request.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

14. TIERED PAGES 3 (4-N-O)
Enter the maximum number of pages (up to 9,999) to which the Tiered Charge 3 applies.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

15. TIERED CHARGE 4 (7-N-O)
Enter a **per page** amount in this field. This charge applies to any number of pages over that entered in the Tiered Charge 3 field. The number of remaining pages is multiplied by the number in this field and then added to the other tiered charge calculations to determine the total charge billed for the request.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

NOTE: If **F** is entered in the Charge Type field, this field cannot be accessed.

16. MINIMUM FEE (7-N-O)
Enter a minimum fee to be charged for this billing type. If the total charges calculated by the flat fee or tiered charges method is less than this number, the minimum fee is charged.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

17. RESEARCH (7-N-O)
Enter a dollar amount to be charged for research for this billing type.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

18. PREPARATION (7-N-O)
Enter a dollar amount to be charged for preparing orders for this billing type.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

19. CERTIFICATION (7-N-O)
Enter a dollar amount to be charged for certifying orders for this billing type.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

20. MICROFILM (7-N-O)
Enter a dollar amount to be charged for copying microfilm for this billing type.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

21. A.O.D IND (1-A-O)
Enter **Y** for Yes or **N** for No to indicate if this is an Accounting of Disclosures billing type. If you enter **Y** in this field and this billing type is used for a request, you will be prompted to print the Accounting of Disclosures Report.

22. POSTAGE (7-N-O)
Enter a dollar amount to be charged for postage for this billing type.

Do not enter a decimal point when making your entry. To enter $10.00, enter **1000**. If you enter 10, 10 cents (.10) is entered in this field. You can enter up to $99,999.99.

23. TAX RATE (5-CN-O)
Enter the percentage to be charged for tax. You must enter the initial period, followed by the percentage. For example, to enter 7%, enter **.07**.

ROI DISCLOSURE INFORMATION

ROI Disclosure Information is entered in the Disclosure Tracking Module, Disclosure Detail tab, in the Information Requested and Information Disclosed fields. It is used to document disclosures of protected health information (PHI), indicating what type of information has been requested and/or disclosed. Some entries in this table may be the same as entries in the Document Type table.

Disclosure information that may be released is not necessarily a part of the patient's medical record. Examples include reporting of death or birth information, reporting of communicable diseases, or copies of radiology x-rays.

After the ROI Disclosure Information table is selected, the system prompts you to enter an ROI disclosure information code. You can enter a code of up to 6 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                  Fri Mar 28, 2003 04:48 pm
ROI Disclosure Information
( 1)Code          : INF
( 2)Description   : INFECTIOUS DISEASE REPORT

( 3)Edit by       : Watson,Amy
( 4)Edit date     : 03/28/03 04:48pm









Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (up to six characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (36-C-R)
Enter the description for this disclosure information code. You can enter up to 36 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI DISCLOSURE METHOD

ROI Disclosure Method is entered in the Disclosure Tracking Module, Disclosure Detail tab. It is used to document how protected health information (PHI) was disclosed.

After the ROI Disclosure Method table is selected, the system prompts you to enter an ROI disclosure method code. You can enter a code of 1 or 2 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                 Fri Mar 28, 2003 04:53 pm
ROI Disclosure Method
( 1)Code         : F
( 2)Description  : FAX

( 3)Edit by      : Watson,Amy
( 4)Edit date    : 03/28/03 04:53pm












Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (1 or 2 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)
Enter the description for this disclosure method code. You can enter up to 19 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI DOCUMENT TYPE

Document Types are used on the Accounts/Documents tab in the Request function to show what types of documents have been requested/released for a selected patient. Some examples are CT Scan, History andPhysical, Discharge Summary, Facesheets for ambulance drivers, etc. Some entries in this table may also be included in the Disclosure Information table.

After the ROI Document Type table is selected, the system prompts you to enter an ROI document type code. You can enter a code of up to 6alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                 Mon Mar 31, 2003 02:19 pm
ROI Document Type
( 1)Code         : HP
( 2)Description  : HISTORY AND PHYSICAL

( 3)Edit by      : Kotter,Sara J
( 4)Edit date    : 03/20/03 02:50pm

Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)

The alphanumeric code (up to 6 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (33-C-R)

Enter the description for this document type code. You can enter up to 33 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)

The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)

The system displays the date that the table entry was last updated.

ROI METHOD OF PAYMENT

The ROI Method of Payment is entered in the Payment Type field on the Billing tab. It indicates how a payment was made (for example, cash, check, credit card).

After the ROI Method of Payment table is selected, the system prompts you to enter an ROI payment method code. You can enter a code of 1 or 2 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                 Mon Mar 31, 2003 02:46 pm
ROI Method of Payment
( 1)Code         : CA
( 2)Description  : CASH

( 3)Edit by      : Watson,Amy
( 4)Edit date    : 03/31/03 02:44pm













Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (1 or 2 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)
Enter the description for this payment method code. You can enter up to 19 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI PURPOSE OF DISCLOSURE

The Purpose of Disclosure table is used in the Disclosure Tracking Module to indicate why information was disclosed. Examples include consultation request, funeral home request, research study, transport, transfer to another facility, infectious disease reporting, and medical examiner-coroner request.

After the ROI Purpose of Disclosure table is selected, the system prompts you to enter an ROI purpose of disclosure code. You can enter a code of up to 6 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                  Mon Mar 31, 2003 03:16 pm
ROI Purpose of Disclosure
( 1)Code         : INSREV
( 2)Description  : INSURANCE REVIEW

( 3)Edit by      : Watson,Amy
( 4)Edit date    : 03/31/03 03:16pm















Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (up to 6 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (36-C-R)
Enter the description for this purpose of disclosure code. You can enter up to 36 characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI REASONS

The ROI Reasons table is used in the following functions to indicate why the function was performed:

- Adjustments

  NOTE: Once a payment is entered for an account, the payment cannot be deleted. Be sure to enter an adjustment reason that can be used when a payment is posted to the wrong account.

- Cancel Request
- Deny Request
- Pend Request
- Cancel Disclosure

When you add a reason code to the table, you can then select for which functions the reason is valid, and the reasons are displayed in the related table lookup.

After the ROI Reasons table is selected, the system prompts you to enter an ROI reason code. You can enter a code of up to 6 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                 General Hospital ROI Table Maintenance Processor
                                                  Thu Apr 17, 2003 04:06 pm
ROI Reasons
( 1)Code           : DIC
( 2)Description    : DICTATION NEEDED
( 3)Valid Functions: PEND REQUEST

( 4)Edit by        : Price,Karen
( 5)Edit date      : 04/03/03 15:19













Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The alphanumeric code (up to 6 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)
Enter the description for this reason code. You can enter up to 19 alphanumeric or special characters.

3. VALID FUNCTIONS (TABLE LOOKUP-R)
Select the functions for which this reason code is valid from the list that is displayed. If you do not select any functions, then the reason is valid for all.

4. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

5. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI REQUESTER TYPE

The ROI Requester Type table is used in the Requester table when defining requesters. It allows you to group requesters by category, such as attorney, government agency, insurance, etc.

The Requester Type of Patient is one of the requester types provided by McKesson with the base software. It has the Patient field set to Yes. This entry triggers the patient that is currently on the screen in the ROI Request Function to be automatically populated as the requester in the Requester field.

After the ROI Requester Type table is selected, the system prompts you to enter an ROI requester type code. You can enter a code of up to 4 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                  Fri Apr 25, 2003 05:49 pm
ROI Requester Type
( 1)Code           : PAT
( 2)Description    : PATIENT
( 3)Patient        : Yes

( 4)Edit by        : Price,Karen
( 5)Edit date      : 04/03/03 15:40










Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)

The alphanumeric code (up to 4 characters) entered on the previous screen is displayed and cannot be edited.

2. DESCRIPTION (19-C-R)

Enter the description for this ROI requester type code. You can enter up to 19 alphanumeric or special characters.

3. PATIENT (1-A-R)
Enter **Y** for Yes or **N** for No to indicate if this requester type is a patient. The default is No.

4. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

5. EDIT DATE (DISPLAY ONLY)
The system displays the date that the table entry was last updated.

ROI REQUESTERS

The ROI Requesters table allows you to define and maintain a file of requesters that are commonly used in day-to-day processing. You can complete the requester's address and billing type information so that information is automatically populated when you add an information request.

This table should include both requesters of information as well as entities or individuals to whom information is disclosed. Following are categories of potential requesters that should be considered when building specific requesters for a facility:

- insurance companies
- attorneys
- tissue banks
- nursing homes
- rehabilitation facilities
- reference labs
- local hospitals
- law enforcement agencies (For example, information is released to the police department on patients where blood alcohol levels have been taken in the emergency room.)
- ambulance services (An ambulance service picking up a patient frequently requires a copy of the patient's facesheet before transporting the patient. The facesheet contains information used by the ambulance service for billing purposes.)
- state or local health departments (Information relative to communicable diseases or birth and death information is frequently released to these entities.)

After the ROI Requesters table is selected, the system prompts you to enter an ROI requester code. You can enter a code of up to 6 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
               General Hospital ROI Table Maintenance Processor
                                                  Thu May 22, 2003 04:39 pm
ROI Requesters
 1 Code    2 Description          3 Edit By          4 Edit Date        5 App
   SHD       STATE HEALTH DEPT       Bradley,Mary       04/15/03 1023      C
 6 Requester Type   7 Billing Type     8 Pre-Pay Status   9 Pre-Pay Assign Date
   STATE HEALTH DE    NO CHARGE          NO
10 Address Line 1            11 Address Line 2
   450 TRINITY BLVD             #847
12 City                13 State    14 ZIP Code    15 Contact
   ALTANTA                GA          30320
16 E-mail Address                           17 Phone         18 Fax

19 Alt Address Line 1        20 Alt Address Line 2

21 Alt City           22 Alt State 23 Alt Zip Code 24 Alt Contact Name

25 Alt E-mail Address                       26 Alt Phone     27 Alt Fax




Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The system displays the code for the requester, as entered at the initial prompt. Each code can be up to six alphanumeric characters.

2. DESCRIPTION (36-C-R)
Enter a description for this requester code, up to 36 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date and time that the table entry was last updated.

5. APP (DISPLAY ONLY)
The system displays the application code for the user who added or edited this requester.

6. REQUESTER TYPE (TABLE LOOKUP-O)
Enter a Requester Type code to be used for this requester. You can enter the code directly if you know it, or enter a hyphen (-) and press Enter to display the Billing Type table and make your selection.

7. BILLING TYPE (TABLE LOOKUP-R)
Enter a Billing Type code to be used for this requester. You can enter the code directly if you know it, or enter a hyphen (-) and press Enter to display the Billing Type table and make your selection.

8. PRE-PAY STATUS (1-A-O)
Enter **Y** for Yes or **N** for No to indicate if this requester must pre-pay for requests. If you enter Y, then a message is displayed during the Release of Information Request function when this requester is selected, indicating that the requester needs to pre-pay before the request can be processed. The default is No.

9. PRE-PAY ASSIGN DATE (DISPLAY ONLY)
This field is updated automatically with the system date and time when Yes is entered in the Pre-Pay Status field. If the Pre-Pay Status field is changed to No or blank, the date is deleted.

10. ADDRESS LINE 1 (25-C-O)
Enter the requester's mailing address, up to 25 characters.

11. ADDRESS LINE 2 (25-C-O)
Enter additional mailing address information for this requester, up to 25 characters.

12. CITY (18-C-O)
Enter the requester's city, up to 18 characters. You can also enter the requester's ZIP code/postcode, and the system automatically fills the City, State/Province, and ZIP Code/Postcode fields.

13. STATE/PROVINCE (TABLE LOOKUP-O)
Enter the 2-character code for the requester's state/province, or enter a hyphen to make your selection from the State/Province table.

14. ZIP CODE/POSTCODE (9-C-O)
Enter the requester's ZIP code/postcode. Enter five or nine digits for U.S.A or X9X9X9 for Canada.

15. CONTACT (25-C-O)
Enter a contact name for this requester, up to 25 characters.

16. E-MAIL ADDRESS (42-C-O)
Enter an e-mail address for this requester, up to 42 characters.

17. PHONE (13-NC-O)
Enter the phone number of the requester. You can enter it in a variety of formats. If you enter it without parentheses or a hyphen, the system automatically inserts them for you. You can also use these formats: (404)111-1111 or 404/111-1111, for example. You can use any special character between the area code and prefix or between the prefix and suffix.

18. FAX (13-NC-O)
Enter the fax number of the requester. You can enter it in a variety of formats. If you enter it without parentheses or a hyphen, the system automatically inserts them for you. You can also use these formats: (404)111-1111 or 404/111-1111, for example. You can use any special character between the area code and prefix or between the prefix and suffix.

NOTE: The following fields allow you to enter an alternate address, contact, e-mail address, phone number, and fax number for this requester. You would use this, for example, if the requester maintains two offices.

You can also use just the phone number or contact fields if the requester has two phone numbers or contacts, for example.

19. ALT ADDRESS LINE 1 (25-C-O)
Enter the requester's alternate mailing address, up to 25 characters.

20. ALT ADDRESS LINE 2 (25-C-O)
Enter additional mailing information for this requester's alternate address, up to 25 characters.

21. ALT CITY (18-C-O)
Enter the city for the requester's alternate address, up to 18 characters. You can also enter the requester's ZIP code/postcode, and the system automatically fills the City, State/Province, and ZIP Code/Postcode fields.

22. ALT STATE/PROVINCE (TABLE LOOKUP-O)
Enter the 2-character code for the state/province of the requester's alternate address, or enter a hyphen to make your selection from the State/Province table.

23. ALT ZIP CODE (9-N-O)
Enter the ZIP code/postcode for the requester's alternate address. Enter five or nine digits for U.S.A or X9X9X9 for Canada.

24. ALT CONTACT NAME (25-C-O)
Enter a contact name at the requester's alternate address, up to 25 characters.

25. ALT E-MAIL ADDRESS (42-C-O)
Enter an e-mail address for the contact at the requester's alternate address, up to 42 characters.

26. ALT PHONE (13-NC-O)
Enter an alternate phone number for the requester. You can enter it in a variety of formats. If you enter it without parentheses or a hyphen, the system automatically inserts them for you. You can also use these formats: (404)111-1111 or 404/111-1111, for example. You can use any special character between the area code and prefix or between the prefix and suffix.

27. ALT FAX (13-N-O)

Enter an alternate fax number for the requester. You can enter it in a variety of formats. If you enter it without parentheses or a hyphen, the system automatically inserts them for you. You can also use these formats: (404)111-1111 or 404/111-1111, for example. You can use any special character between the area code and prefix or between the prefix and suffix.

ROI RETURN ADDRESS LABELS

The ROI Return Address Labels table allows you to create return address labels to use when you send information to requesters. You can create different labels for each facility if necessary.

After the ROI Return Address Labels table is selected, the system prompts you to enter an ROI return address label code. You can enter a code of up to 6 alphanumeric characters, or enter a hyphen (-) to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter a code, the following screen is displayed:

```
                General Hospital ROI Table Maintenance Processor
                                                  Thu Apr 17, 2003 04:45 pm
ROI Return Address Labels
( 1)Code         : HIM
( 2)Description  : HEALTH INFORMATION MGMNT
( 3)Edit By      : Bradley,Mary
( 4)Edit Date    : 04/09/03 2043

( 5)Label Text   :
                    |Health Information Management Dept.|
                    |County General Hospital            |
                    |1622 North Maple Street            |
                    |Small Town, GA  30062              |
                    |                                   |
                    |                                   |






Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The system displays the code for the return address label, as entered at the initial prompt. Each code can be up to six alphanumeric characters.

2. DESCRIPTION (36-C-R)
Enter a description for this return address label code, up to 36 alphanumeric or special characters.

3. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this table entry.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date and time that the table entry was last updated.

5. LABEL TEXT (TEXT EDITOR-R)

Enter the text for the return address label. You can enter up to 6 lines of text, with 35 characters/spaces per line.

Function keys are available on this screen to help with formatting the text. The following describes each function key:

Key	Function
F1	Deletes the line that the cursor is on.
F2	Inserts a line above the line you are on.
F3	Centers the line that the cursor is on.
F4	Ends the transaction and exits the Label Text field.
F5	Saves the line that the cursor is on.
F6	Copies the saved line to the line on which the cursor is presently residing.
F7	Aligns paragraph so that it is left and right margin justified.
F10	Provides information regarding other keys on the keyboard and their role in the text processor.

For more information on this text editor, see the discussion of the Bulletin Board in Chapter 5: Universal Functions in the *STAR Patient Care, General Information Volume*.

Chapter 4 - LETTER MAINTENANCE

INTRODUCTION

Letters can be generated from the Release of Information function as a by-product of activity performed on a request and can also be demand printed separately from the Release of Information Reports function by selecting the Letters/Notices/Labels tab. The following notices/letters are request specific and require selection of a patient and request to print:

- Pending Notice
- Denied Notice
- Request Cover Letter

Billing Notices are past due notices that, when selected, generate notices for all requests that have been invoiced and are 30, 60, or 90 days past due. The notice that prints is determined by selection of the past due days.

Up to 16 user-defined letters can be generated on demand. These letters can be associated with a patient and request but can also be user-defined forms that do not require patient or request selection.

This chapter provides information on setting up and maintaining these letters.

When you select ROI Letter Maintenance from the STAR Navigator menu, the following screen is displayed:

```
                  General Hospital ROI Letter Maintenance Processor
                                                 Sat Apr 26, 2003 05:02 pm
ROI Letter Maintenance Input Options

            Option No.  Option
            ----------------------------------------
                1       ROI Denial Letter

                2       ROI Pending Request Letter

                3       ROI Cover Letter

                4       ROI Billing Notice > 30

                5       ROI Billing Notice > 60

                6       ROI Billing Notice > 90

                7       ROI User Defined Letters


Enter option number--
```

NOTE: Letters are facility specific. If you have access to multiple facilities, you must select a facility before the Letter Maintenance Softkey Editor is displayed. Otherwise, selecting a letter from the above menu takes you to the Softkey

Editor for that letter. For information on the Softkey Editor, refer to the *STAR Patient Care Reference Guide, General Information Volume*, Chapter 11: Softkey Editor.

The Softkey Editor uses functions keys F1 to F15. You may not have keys F11 to F15 on your keyboard. The following table lists how to access these functions:

F11	ALT+F1 (simultaneously)
F12	ALT+F2 (simultaneously)
F13	ALT+F3 (simultaneously)
F14	ALT+F4 (simultaneously)
F15	ALT+F5 (simultaneously)

See the following sections for a description of each letter and the data elements that can be used in the letters.

DATA ELEMENTS

Data elements provide an easy way for you to enter information into letters. When a data element is entered into a letter, the information stored in the request that corresponds to that data element prints in that location when the letter is generated.

For any data element you want inserted in the letter at print time, reserve space in the letter text and identify what should be printed by keying in the element name exactly as it is listed below, including the less than sign (<) and greater than sign (>) surrounding the name. When identifying data to be pulled into the letter from the STAR database, keep in mind the maximum length needed to print the data so that you have enough room for it to print.

You can also enter a comma (,) and a number within the data element to truncate the data to that number of characters. For example, entering <RPNME,25> truncates the patient's name to 25 characters instead of using all 36 characters.

See the table below for data elements and the corresponding fields.

Data Element	Corresponding Request Field/System Information
<DATE>	System Date
<RADDR1>	Requester Mailing Address 1
<RADDR2>	Requester Mailing Address 2
<RBAL>	Requester Account Balance
<RCITY>	Requester City
<RDPD>	Requester Account Days Past Due
<RDR>	Denial/Cancel Reason
<RIDATE>	Invoice Date
<RINV>	Invoice Number
<RNME>	Requester Name
<RPNME>	Patient Name
<RPR>	Pending Reason
<RREF>	Requester Reference Number
<RSTATE>	Requester State/Province
<RZIP>	Requester ZIP Code/Postcode

ROI DENIAL LETTER

Following is a sample of the ROI Denial Letter provided with the base software.

```
                                                General Hospital
                                                Facility Address 1
                                                Facility Address 2
                                                City, State, ZIP
                                                Facility Phone

<Requester Name>
<Requester Address 1>
<Requester Address 2>
<City>, <State> <ZIP>

<system date>

Re: Request for Information on <Patient Name>
    Reference Number: <Reference Number>

Reason:  <Denial Reason>


                                DENIAL NOTICE


Sample:  Your request for information on the above patient has been denied due to the
above reason. If you feel this request was denied in error, please contact the Health
Information Management Department at 555.555.3333.










Release of Information Staff
General Hospital
```

ROI PENDING REQUEST LETTER

Following is a sample of the ROI Pending Request Letter provided with the base software.

```
                                               General Hospital
                                               Facility Address 1
                                               Facility Address 2
                                               City, State, ZIP
                                               Facility Phone

<Requester Name>
<Requester Address 1>
<Requester Address 2>
<City>, <State> <ZIP>

<system date>

Re: Request for Information on <Patient Name>
    Reference Number: <Reference Number>

Reason:  <Denial reason>


                               PENDING NOTICE


Sample:  We have received your request for information on the above patient. We are
unable to process your request for the above reason.  You may contact the Health
Information Management Department at 555.555.3333 for further assistance.











Release of Information Staff
General Hospital
```

ROI COVER LETTER

Following is a sample of the ROI Cover Letter provided with the base software.

```
                                                 General Hospital
                                                 Facility Address 1
                                                 Facility Address 2
                                                 City, State, ZIP
                                                 Facility Phone

<Requester Name>
<Requester Address 1>
<Requester Address 2>
<City>, <State> <ZIP>

<system date>

Re: Request for Information on <Patient Name>
    Reference Number: <Reference Number>



Sample:  Attached please find the requested medical record documents on the above
patient.  If you have questions regarding your request, contact the Health Information
Management Department at 555.555.3333.









Release of Information Staff
General Hospital
```

ROI BILLING NOTICE

Following is a sample of an ROI Billing Notice provided with the base software. You can modify the text to address accounts that are 30, 60, or 90 days past due.

```
                                                  General Hospital
                                                  Facility Address 1
                                                  Facility Address 2
                                                  City, State, ZIP
                                                  Facility Phone

<Requester Name>
<Requester Address 1>
<Requester Address 2>
<City>, <State> <ZIP>

<System Date>

Re: Request for Information on <Patient Name>

Reference Number   <Reference Number>

Invoice Number     <Invoice Number>

Invoice Date       <System Date>

Days Past Due      <Account Days Past Due>

Balance Due:       <Requester Account Balance>


                            BILLING NOTICE


Sample:  Please submit payment for balance due. If payment has already been sent, please
disregard this notice.  For inquiries regarding your balance, contact the Health
Information Management Department at 555.555.3333.


Release of Information Staff
General Hospital
```

ROI USER DEFINED LETTERS

When the ROI User Defined Letters option is selected, the following menu is displayed to allow you to create up to 16 user defined letters.

```
                  General Hospital ROI User Defined Letters Processor
                                                  Sat Apr 26, 2003 06:05 pm
ROI User Defined Letters Input Options

            Option No.  Option
            ----------------------------------------
                1       ROI User Defined Letter #1
                2       ROI User Defined Letter #2
                3       ROI User Defined Letter #3
                4       ROI User Defined Letter #4
                5       ROI User Defined Letter #5
                6       ROI User Defined Letter #6
                7       ROI User Defined Letter #7
                8       ROI User Defined Letter #8
                9       ROI User Defined Letter #9
               10       ROI User Defined Letter #10
               11       ROI User Defined Letter #11
               12       ROI User Defined Letter #12
               13       ROI User Defined Letter #13
               14       ROI User Defined Letter #14
               15       ROI User Defined Letter #15
               16       ROI User Defined Letter #16
Enter option number--
```

Enter the option number for the letter you wish to set up or edit, and the following screen is displayed:

```
               General Hospital ROI User Defined Letter #1 Processor
                                                  Fri Apr 25, 2003 05:09 pm
Model Hospital A
Release of Information - User Defined Letter #1
 1 User Defined Letter Description    2 Patient Selection   3 Request Selection
   My # 1 user defined ltr              No                    No
 4 Activate                           5 Edit Letter?
   Yes                                  Yes
 6 Edit By                            7 Edit Date
   McMillan,Johnnie                     04/04/03 1408

Enter field number or '/' starting field number--
```

Field Explanations

1. USER DEFINED LETTER DESCRIPTION (24-C-R)
Enter a description for the letter. The letter description is displayed on the Letter tab in the Release of Information Reports function.

2. PATIENT SELECTION (1-A-R)
Enter **Y** for Yes or **N** for No to indicate if this letter requires a patient to be selected. If you enter Yes, when this letter is selected to print in the application, the selection of a patient/account is required. The default is No.

3. REQUEST SELECTION (1-A-R)
Enter **Y** for Yes or **N** for No to indicate if this letter requires a request to be selected. If Yes, when selecting the letter to print in the application, the selection of a request is required.

NOTE: This field can be set to Yes only if the Patient Selection field is set to Yes.

4. ACTIVATE (1-A-R)
When this field is selected, the following prompt is displayed:

Enter activate(A) or inactivate(I) letter-- |

Enter **A** to activate the letter or **I** to inactivate the letter.

NOTE: This field is set to Inactive upon initial build and remains Inactive until it is changed by you. Once the letter body is built and ready for use, access this field to activate the letter. The letter description is displayed on the Letter tab in the Release of Information Reports function for selection only when the letter is activated.

5. EDIT LETTER? (1-A-R)
Enter **Y** for Yes ifyou are ready to enter the text for this letter. If you enter Y, the Softkey Editor is displayed. For information on the Softkey Editor, refer to the *STAR Patient Care Reference Guide, General Information Volume*, Chapter 11: Softkey Editor.

6. EDIT BY (DISPLAY ONLY)
The system displays the name of the person who last updated this screen.

7. EDIT DATE (DISPLAY ONLY)
The system displays the date and time that the screen was last updated.

Chapter 5 - SPECIAL CONSIDERATIONS

MULTI-FACILITY CONSIDERATIONS

The Release of Information tables can be split or shared in a multi-facility environment. It is recommended that tables be shared when possible to reduce the maintenance effort for the facility.

The Facility Parameters must be defined for each facility that is using the Release of Information Module.

Letters are specific to each facility and cannot be shared. When you are building or editing letters, remember to review each facility's letters for changes.

The same hierarchy used throughout the STAR product determines access to facilities within the Release of Information application. The system checks the Hospital Employee File and then the CRT Names table to determine which facilities the user can access.

NETWORK CONSIDERATIONS

The Release of Information functions are defined as all functions in the module other than Disclosure Tracking. The Release of Information functions can be used only on the CPU that is designated as the “master” ROI CPU. The Disclosure Tracking function can be used on all CPUs in the network and from the STAR Clinical and Financial products.

If STAR Patient Care is in the network, then the Patient Care CPU must be the ROI Master CPU. If STAR Patient Care is not in the network, then the ROI Master CPU can be any CPU in the network.

Below are some sample network configurations and how the Release of Information Module works in these environments.

# of CPUs	STAR Pt. Care	Ex: STAR Lab	Ex: STAR Rad	Release of Information Functions	Disclosure Tracking
One	Yes	Yes	Yes	Patient Care (MED) is the master CPU.	Can be used on all CPUs.
One	No	Yes	Yes	One product needs to be identified as the master for the Release of Information functions.	Can be used on all CPUs.
Multiple	Yes	Yes	Yes	Patient Care (MED) is the master CPU.	Can be used on all CPUs.
Multiple	No	Yes	Yes	One CPU and product need to be identified as the master for the Release of Information functions.	Can be used on all CPUs.

Chapter 6 - PROCEDURAL CONSIDERATIONS

INTRODUCTION

This chapter provides information that your facility should consider when developing its procedures for using and supporting the Release of Information Module.

INTERNAL POLICY FOR SUPPORT

You should establish an internal policy as to how support issues are handled, since many departments in the facility can have access to the Disclosure Tracking Module. You should determine to which support analyst in the Information Systems department issues should be logged for this module.

If the support analyst needs to log a call with McKesson, he or she should call the STAR Support Center and select STAR Clinical Products and then STAR Medical Record support.

MEANING OF ENTIRE CHART

The facility should define the meaning of “entire chart” when the option *Request Entire Chart/All Accounts* is selected.

For example, the definition of the entire chart means all documents associated with the patient’s record but excludes doctor’s orders and progress notes.

PROTECTED HEALTH INFORMATION (PHI) DISCLOSURES

HIPAA legislation effective April 2003 provides that patients can request a list of everyone to whom their healthcare information was given, for purposes other than treatment, payment or healthcare operations. Hospitals are required to provide such a listing to the patients within 60 days of their request.

This list is referred to in the HIPAA Privacy Rule as a tracking or accounting of disclosures. Even though the hospitals are not required to track disclosures of information for purposes of treatment, payment, or healthcare operations, many hospitals may elect to also track these types of disclosures. Utilizing the Disclosure Tracking function of the Release of Information Module allows a hospital to track any disclosures of patient-specific healthcare information.

You can cancel a Disclosure but cannot delete it, and the cancellation reason is required.

All disclosures are tracked by account number.

The Released Date field is required if there is data in the Information Requested or Information Disclosed field. If you use the TAB key to move past the Released Date field, the system automatically populates the field with the current date.

Editing of disclosures must be done account by account; no global edit is available.

ALERT BUTTON

The Alert button is displayed in the patient header and is the exclamation point within a box.

Clicking the Alert button in the header allows you to add, view, activate/inactivate, and modify Release of Information Alerts for the patient. If there are active alerts, the button flashes red; if no active alerts, the button is black.

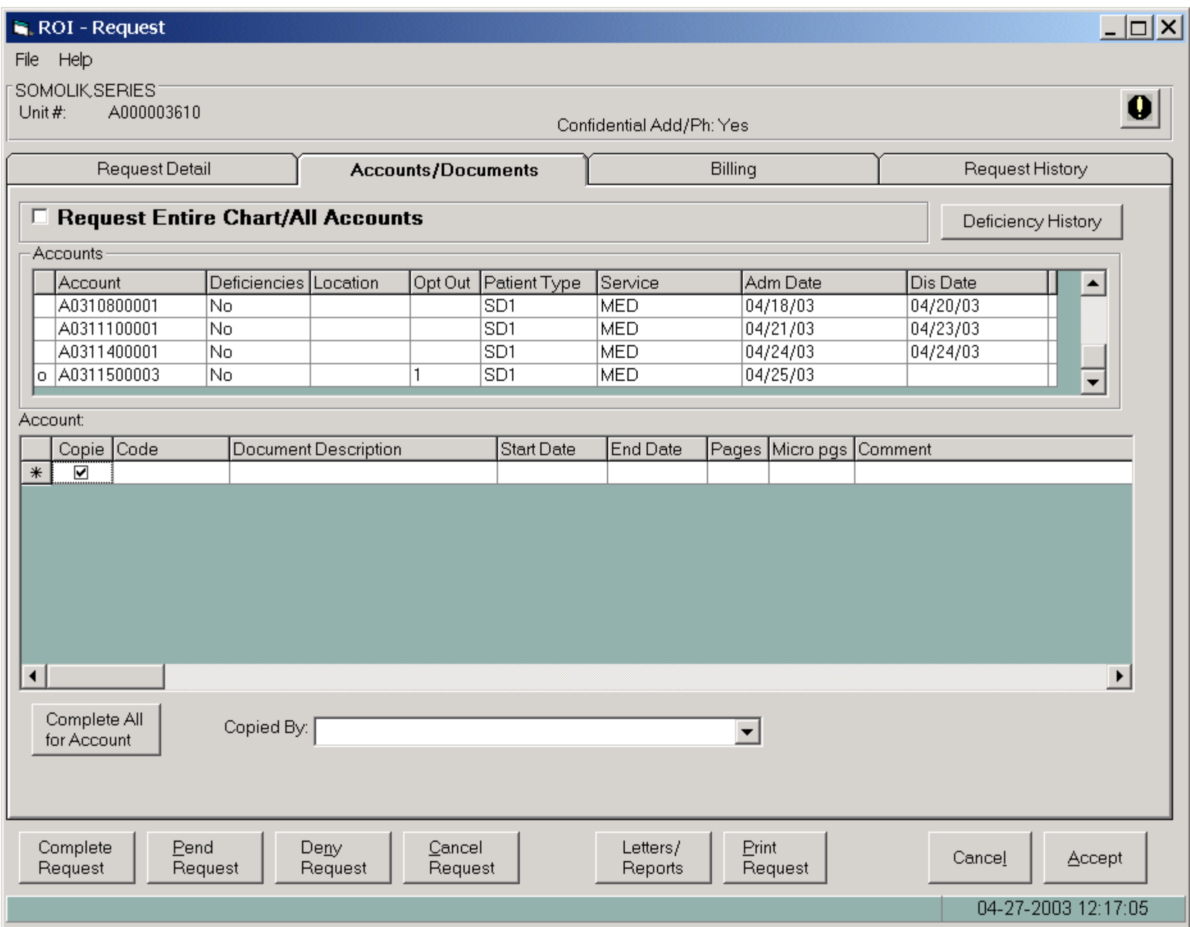
NOTE: This alert is for Release of Information users only and does not default from Patient Processing, although an invalid address and/or phone number entered for a patient or guarantor in Patient Processing causes the Alert button to flash.

CONFIDENTIALITY INDICATORS

The confidentiality indicators that are displayed in the header or the Accounts grid sections of the Release of Information Module are populated from information entered on the Patient or Medical page in the STAR Admission process:

- Confidential Address/Phone, indicating that an alternate address and/or phone number should be used to contact the patient, is displayed in the header. (Patient level - Patient page)
- Opt Out Indicator, indicating the patient does not want to be included in the hospital's directory listing, is displayed in the Accounts grid. (Visit level - Medical page)

In the sample below, the last account in the Accounts grid includes an Opt Out indicator, which is displayed in the first column of the grid.

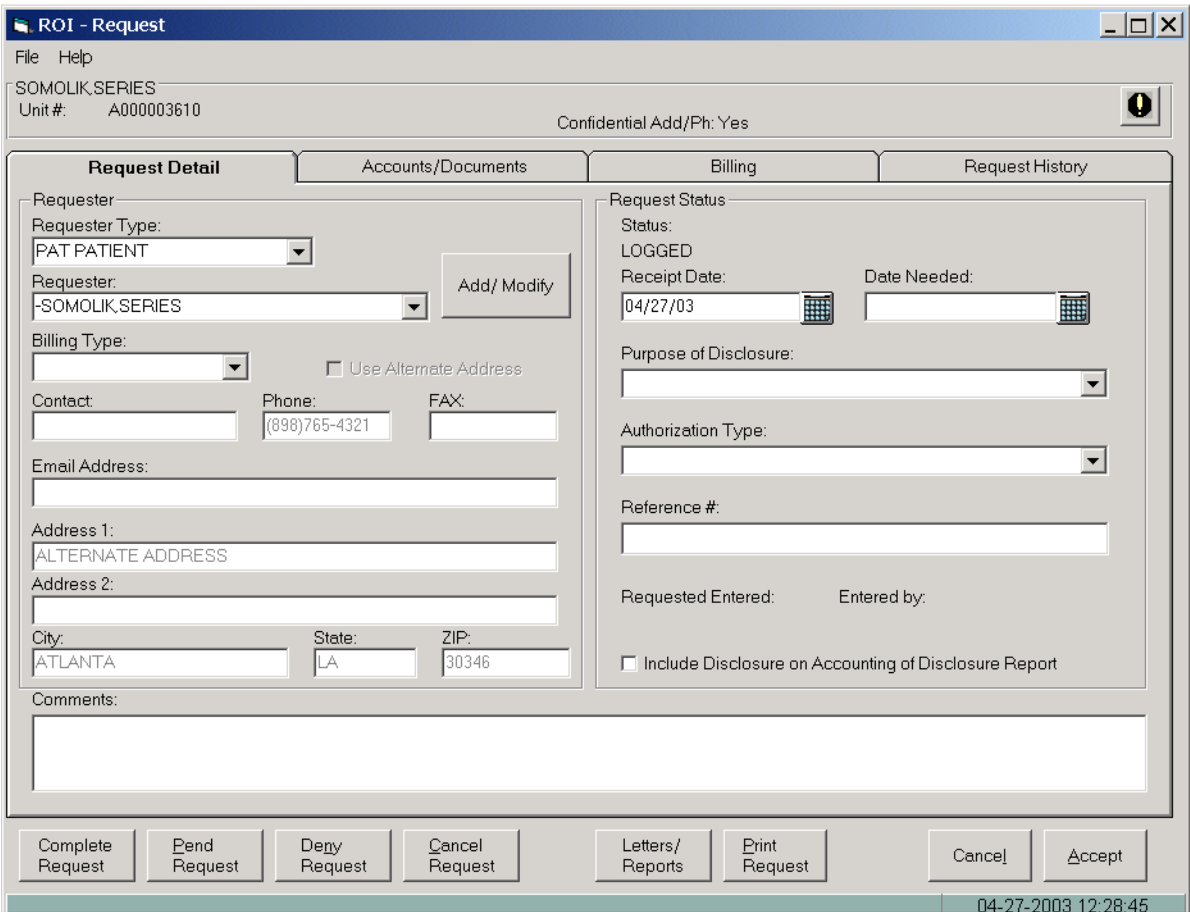


ALTERNATE ADDRESS FOR A PATIENT

When Patient is selected as the Requester Type and the patient has indicated for Admissions to use an alternate address as the mailing address, the alternate address fills into the Request Detail form. If the patient has requested the alternate address be used in Admissions, the *Use Alternate Address* checkbox is disabled on this form.

If the information is changed using the Add/Modify button, this information is stored in the Release of Information table as the mailing address for the patient for any documentation (labels or reports) that is mailed to the patient from this module.

Also note the Confidential Add/Ph indicator in the header section of the form. It is displayed when a patient has indicated that he or she has a confidential address during the Admission process.



CASH POSTING

Cash posting is a manual process; there is no mapping to the General Ledger. You might want to define a separate miscellaneous cash code that is mapped to a separate department and sub-account in the General Ledger for reporting.

RELEASE OF INFORMATION WORK LIST

When displaying information in the work list or in the Reports function, the criteria selected for inclusion may have an impact on performance. The selection criteria may result in a large volume of records to be retrieved, and it will take longer to return the results for display. Limiting your selection to fewer records to be retrieved at a time reduces the time it takes to display the requested information.

If the work list criteria are changed from a previous selection, the report results are cleared automatically, so you need to click the **Retrieve** button.

The results can be displayed to the screen or exported to a third-party software application.

The checkmark indicates that work has been completed on the selected account.

Printing the work list defaults to **not** include requests in Complete status. If you do include them, the volume of accounts retrieved could be excessive.

RELEASE OF INFORMATION BY REQUESTER

For batch logging of requests, you must request the same document type(s) for all patients to use this function.

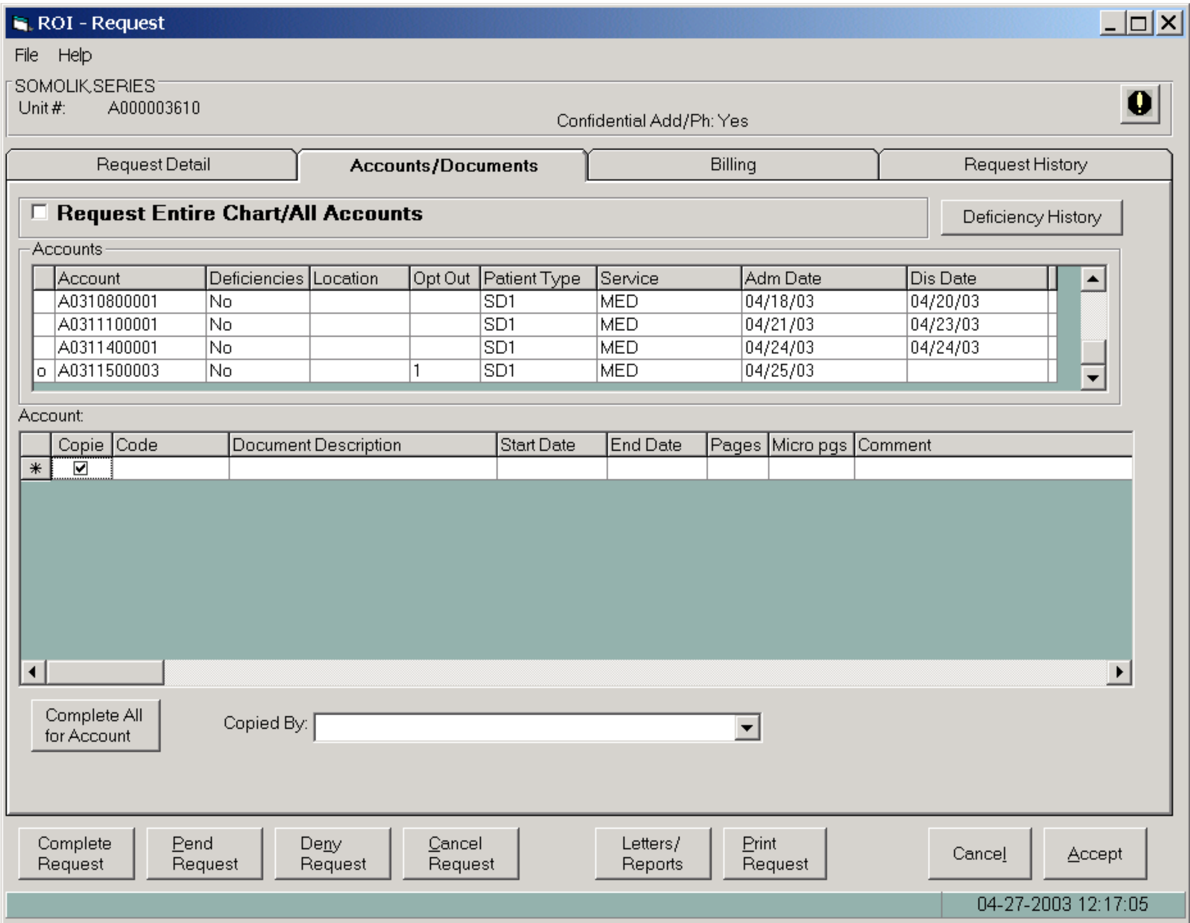
Use the arrow keys to move inside the grid rather than the TAB key.

If a unit number is selected, the system automatically associates all accounts with the documents selected.

RELEASE OF INFORMATION REQUEST

Accounts/Documents Tab

You can enter start/end dates for documents to distinguish the first discharge summary from the second discharge summary on same account, for example.



In Date fields that are within grids, such as the Start Date and End Date, you must enter the date exactly as you want it to display. Date entry options such as T, T+1, T-1 cannot be used in the grid.

Billing Tab

Press the Post Payment button to update the balance if an adjustment balance amount or adjusted payment amount is entered.

When you select Print/Fax Invoice, the current date is defaulted as the invoice date if a date is not entered.

Complete Request

You can enter the total pages copied, and you can print a request cover letter and/or send an e-mail indicating the request has been processed if the e-mail address is defined in the Requester table.

Return e-mail can be received as long as a standard e-mail package such as Microsoft® Outlook® is being used.

In the Copied By field, you can give credit to someone else for copying/processing the request as long or he/she is built as a Release of Information user (by using the dropdown menu to select a different user). The default is the person whose log-on information was used to access STAR Navigator.

Appendix A - WORKSHEETS

FACILITY PARAMETERS

Last Invoice	10 N
Add Requesters Default	Yes/No
Batch Label Printer	Table Lookup
AOD Reminder Message	50 C

Facility	
Last Invoice	
Add Requester Default	
Batch Label Printer	
AOD Reminder Message	

Facility	
Last Invoice	
Add Requester Default	
Batch Label Printer	
AOD Reminder Message	

Facility	
Last Invoice	
Add Requester Default	
Batch Label Printer	
AOD Reminder Message	

ROI AUTHORIZATION TYPE

Code	4 AN
Description	19 C

Code	Description

ROI BILLING TYPE

Billing Code	4 AN
Description	19 C
Charge Type	Flat (F) or Tiered (T)
Flat Charge	$ 0 - 99,999.99
Additional Per Page	$ 0 - 99,999.99
Tiered Charge 1	$ 0 - 99,999.99
Tiered Pages 1	up to 9,999
Tiered Charge 2	$ 0 - 99,999.99
Tiered Pages 2	up to 9,999
Tiered Charge 3	$ 0 - 99,999.99
Tiered Pages 3	up to 9,999
Tiered Charge 4	$ 0 - 99,999.99
Minimum Fee	$ 0 - 99,999.99
Research	$ 0 - 99,999.99
Preparation	$ 0 - 99,999.99
Certification	$ 0 - 99,999.99
Microfilm	$ 0 - 99,999.99
AOD Indicator	Yes/No
Postage	$ 0 - 99,999.99
Tax Rate	0 - .9999 %

Flat Charge Types

Billing Code	
Description	
Charge Type	**F**
Flat Charge	
Additional Per Page	
Minimum Fee	
Research	
Preparation	
Certification	
Microfilm	
AOD Indicator	

Postage	
Tax Rate	

Billing Code	
Description	
Charge Type	**F**
Flat Charge	
Additional Per Page	
Minimum Fee	
Research	
Preparation	
Certification	
Microfilm	
AOD Indicator	
Postage	
Tax Rate	

Billing Code	
Description	
Charge Type	**F**
Flat Charge	
Additional Per Page	
Minimum Fee	
Research	
Preparation	
Certification	
Microfilm	
AOD Indicator	
Postage	
Tax Rate	

Tiered Charge Types

Billing Code	
Description	
Charge Type	**T**
Tiered Charge 1	
Tiered Pages 1	
Tiered Charge 2	
Tiered Pages 2	
Tiered Charge 3	
Tiered Pages 3	
Tiered Charge 4	
Minimum Fee	
Research	
Preparation	
Certification	
Microfilm	
AOD Indicator	
Postage	
Tax Rate	

Billing Code	
Description	
Charge Type	**T**
Tiered Charge 1	
Tiered Pages 1	
Tiered Charge 2	
Tiered Pages 2	
Tiered Charge 3	
Tiered Pages 3	
Tiered Charge 4	
Minimum Fee	
Research	
Preparation	
Certification	

Microfilm	
AOD Indicator	
Postage	
Tax Rate	

Billing Code	
Description	
Charge Type	**T**
Tiered Charge 1	
Tiered Pages 1	
Tiered Charge 2	
Tiered Pages 2	
Tiered Charge 3	
Tiered Pages 3	
Tiered Charge 4	
Minimum Fee	
Research	
Preparation	
Certification	
Microfilm	
AOD Indicator	
Postage	
Tax Rate	

ROI DISCLOSURE INFORMATION

Code	6 AN
Description	36 C

Code	**Description**

ROI DISCLOSURE METHOD

Code	2 AN
Description	19 C

Code	**Description**

ROI DOCUMENT TYPE

Code	6 AN
Description	33 C

Code	**Description**

ROI INVOICE PARAMETERS

Print Detail or Summary	1 A (D or S)
Detail Print Option	
Requester	Yes/No
Invoice Number	Yes/No
Accounts Copied	Yes/No
Base Charge	Yes/No
Preparation Charge	Yes/No
Certification Charge	Yes/No
Microfilm Fee	Yes/No
Charge Adjustment Amt	Yes/No
Charge Adjustment [Reason]	Yes/No
Postage/Shipping	Yes/No
Sales Tax	Yes/No
Payment Posted	Yes/No
Right Justify	Yes/No
Print Payment Stub	Yes/No
Invoice Text	8 Lines (70 characters/line)

Facility	
Print Detail or Summary	
Detail Print Option	
Requester	
Invoice Number	
Accounts Copied	
Base Charge	
Preparation Charge	
Certification Charge	
Microfilm Fee	
Charge Adjustment Amt	
Charge Adjustment [Reason]	
Postage/Shipping	
Sales Tax	

Payment Posted	
Right Justify	
Print Payment Stub	
Invoice Text	

Facility	
Print Detail or Summary	
Detail Print Option	
Requester	
Invoice Number	
Accounts Copied	
Base Charge	
Preparation Charge	
Certification Charge	
Microfilm Fee	
Charge Adjustment Amt	
Charge Adjustment [Reason]	
Postage/Shipping	
Sales Tax	
Payment Posted	
Right Justify	
Print Payment Stub	

Invoice Text	

Facility	
Print Detail or Summary	
Detail Print Option	
Requester	
Invoice Number	
Accounts Copied	
Base Charge	
Preparation Charge	
Certification Charge	
Microfilm Fee	
Charge Adjustment Amt	
Charge Adjustment [Reason]	
Postage/Shipping	
Sales Tax	
Payment Posted	
Right Justify	
Print Payment Stub	

Invoice Text	

ROI METHOD OF PAYMENT

Code	2 AN
Description	19 C

Code	**Description**

ROI PURPOSE OF DISCLOSURE

Code	6 AN
Description	36 C

Code	**Description**

ROI REASONS

Code	6 AN
Description	19 C
Valid Function(s)	Table Lookup

Code	**Description**	**Valid Function(s)**

ROI REQUESTER TYPE

Code	4 AN
Description	19 C
Patient	Yes/No

Code	Description	Patient

ROI REQUESTERS

Code	6 AN
Description	36 C
Requester Type	Table Lookup
Billing Type	Table Lookup
Pre-Pay Status	Yes/No
Address Line 1	25 C
Address Line 2	25 C
City	18 C
State/Province	Table Lookup
ZIP Code/Postcode	9 C
Contact	25 C
E-mail Address	42 C
Phone	13 NC
Fax	13 NC
Alt[ernate] Address Line 1	25 C
Alt[ernate] Address Line 2	25 C
Alt[ernate] City	18 C
Alt[ernate] State/Province	Table Lookup
Alt[ernate] ZIP Code/Postcode	9 C
Alt[ernate] Contact	25 C
Alt[ernate] E-mail Address	42 C
Alt[ernate] Phone	13 NC
Alt[ernate] Fax	13 NC

Code	
Description	
Requester Type	
Billing Type	
Pre-Pay Status	
Address Line 1	
Address Line 2	
City	
State/Province	
ZIP Code/Postcode	
Contact	
E-mail Address	
Phone	
Fax	
Alt[ernate] Address Line 1	
Alt[ernate] Address Line 2	
Alt[ernate] City	
Alt[ernate] State/Province	
Alt[ernate] ZIP Code/Postcode	
Alt[ernate] Contact	
Alt[ernate] E-mail Address	
Alt[ernate] Phone	
Alt[ernate] Fax	

Code	
Description	
Requester Type	
Billing Type	
Pre-Pay Status	
Address Line 1	
Address Line 2	
City	
State/Province	
ZIP Code/Postcode	
Contact	
E-mail Address	
Phone	
Fax	
Alt[ernate] Address Line 1	
Alt[ernate] Address Line 2	
Alt[ernate] City	
Alt[ernate] State/Province	
Alt[ernate] ZIP Code/Postcode	
Alt[ernate] Contact	
Alt[ernate] E-mail Address	
Alt[ernate] Phone	
Alt[ernate] Fax	

Code	
Description	
Requester Type	
Billing Type	
Pre-Pay Status	
Address Line 1	
Address Line 2	
City	
State/Province	
ZIP Code/Postcode	
Contact	
E-mail Address	
Phone	
Fax	
Alt[ernate] Address Line 1	
Alt[ernate] Address Line 2	
Alt[ernate] City	
Alt[ernate] State/Province	
Alt[ernate] ZIP Code/Postcode	
Alt[ernate] Contact	
Alt[ernate] E-mail Address	
Alt[ernate] Phone	
Alt[ernate] Fax	

Code	
Description	
Requester Type	
Billing Type	
Pre-Pay Status	
Address Line 1	
Address Line 2	
City	
State/Province	
ZIP Code/Postcode	
Contact	
E-mail Address	
Phone	
Fax	
Alt[ernate] Address Line 1	
Alt[ernate] Address Line 2	
Alt[ernate] City	
Alt[ernate] State/Province	
Alt[ernate] ZIP Code/Postcode	
Alt[ernate] Contact	
Alt[ernate] E-mail Address	
Alt[ernate] Phone	
Alt[ernate] Fax	

ROI RETURN ADDRESS LABELS

Code	6 AN
Description	36 C
Label Text	6 Lines (35 characters/line)

<table>
<tr><th>Code</th><th>Description</th><th>Label Text</th></tr>
<tr><td rowspan="6"></td><td rowspan="6"></td><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td rowspan="6"></td><td rowspan="6"></td><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td rowspan="6"></td><td rowspan="6"></td><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td rowspan="6"></td><td rowspan="6"></td><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
<tr><td></td></tr>
</table>

Code	Description	Label Text

USER SECURITY PARAMETERS

Post Payments	Yes/No
Adjustments	Yes/No
AOD Suspend	Yes/No
Disclosure Tracking Security	U[ser], D[epartment], or A[ll]
Add/Edit Requests	Yes/No
Add Requesters	Yes/No
Print Reports	Yes/No

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Application Code	
Employee ALLSTAR Code/ Name	
Post Payments	
Adjustments	
AOD Suspend	
Disclosure Tracking Security	
Add/Edit Requests	
Add Requesters	
Print Reports	

Appendix B - TESTING GUIDELINES

TESTING GUIDELINES

Perform the following steps in each of the following functions to test the Release of Information Module.

Release of Information Request

Use the following guidelines when testing Requests (Release of Information form and Request Detail tab):

- Select a patient with chart deficiencies, and confirm ability to view deficiencies from the Release of Information form.
- Verify the ability to go to Disclosure Tracking from the Release of Information form.
- Verify the ability to go to Letters/Reports from the Release of Information form.
- Verify the ability to add requests for information into the Release of Information module.
    - Add requests using requesters previously entered in the Requester table:
        - Confirm the correct information defaults into the request.
        - Confirm the ability to choose an alternate address from the Requester table.
        - Confirm the ability to override information for this request with new address, contact, e-mail address, etc.
    - Add requests using requesters not in the Requester table by entering a hyphen (-) in front of the name.
    - Verify that all requests are “Logged” (view on History tab) when you click **Accept** on the Request Detail form.
- Verify the ability to Pend or Deny a request:
    - Verify Request Status is updated.
    - Verify History is updated.
- Verify the ability to edit requests previously entered into the Release of Information Module.
- Verify the ability to identify documents needed for a request.
- Verify the ability to specify documents copied.

- Verify that the number of pages entered on the Accounts/Documents tab defaults into the Total Pages field on the Billing tab.
- Verify the ability to Complete a request, and verify the request status is updated when the request is completed.
- Verify information on the Request form is saved when you click **Accept** on the Request Detail tab.
- Verify information from Accounts/Documents tab is saved when you click **Accept** on this tab.

Use the following guidelines when testing Request Billing tab:

- Verify billing calculations are correct:
  - Perform setup in the Billing Type table necessary to perform:
    - Tiered Billing calculations
    - Flat Charge calculations
    - No Charge calculations (Use flat charge for this with 0.00 amount)
  - Enter requests with billing types for each of above and verify correct calculations.
  - Verify ability to override the number of pages defaulting into the Billing tab, when the number of pages are entered on the Documentation tab.
  - Verify that if the number of total pages changes, the calculation updates correctly.
- Verify the ability to add an adjustment (positive and negative) to the charges.
- Verify the ability to add adjustments (positive or negative) to the balance due (for overpayments and write-offs).
- Verify the ability to print/fax an invoice from the Billing tab.
- Verify the ability to add a payment and that adding a payment updates the balance due correctly.
- Verify correct calculation of the balance due:
  - after entering a payment
  - after entering a balance due adjustment

Use the following guidelines when testing Request History:

- Verify that the Request Detail tab is always updated with the current request status.
- Verify that the History tab is updated each time a request is logged, pended, completed, or denied.

Release of Information Work List

Use the following guidelines when testing the Release of Information Work List.

- Select the following:
  - no statuses, requesters and requester types, and verify no entries are found.
  - one status by each date selection category without a date range, and verify the correct entries are found for all dates for the date selection category.
  - multiple statuses by each date selection category without a date range, and verify the correct entries are found for the selected statuses for all dates.
  - one status by each date selection category with a date range, and verify the correct entries are found for the date range for the date selection category.
  - multiple statuses by each date selection category with a date range, and verify the correct entries are found for the selected statuses for the date range.
  - one status and one requester by each date selection category without a date range and verify the correct entries are found for all dates for the date selection category. Retest using multiple statuses and multiple requesters. Retest using a date range.
  - one status and request type by each date selection category without a date range, and verify the correct entries are found. Retest using multiple statuses and request types. Retest using a date range.
  - one status, requester and request type by each date selection category without a date range, and verify the correct entries are found. Retest using multiple statuses, requesters and request types. Retest using a date range.
- Verify that one entry and multiple entries can be processed using the Process ROI button for each work list created.
- Verify that the ROI Request button on both the Criteria form and the work list takes you to the ROI functionality and allows you to add/edit as appropriate.
- Verify that clicking the **Print** button prints the work list.

- Verify that the various sort options on the work list sort the entries appropriately.

Release of Information by Requester

Use the following guidelines when testing the Release of Information by Requester:

- Verify the ability to log a batch request for a requester.
- Verify the ability to select accounts and documents for the batch.
- Verify the ability to view batch requests that have not been completed for a requester.
- Verify the ability to select a batch (from Currently Logged Requests) and edit it.
- Verify batches no longer appear on the Currently Logged Requests form once they have been completed.

Disclosure Tracking

Use the following guidelines when testing Disclosure Tracking, after you define table values for Information Requested/Disclosed, Disclosure Purpose, and Disclosure Method in ROI Table Maintenance:

- Verify that you can select a patient using MPI Search and also by directly entering an account number or unit number.
- Verify all the patient's accounts display in the Accounts Selected for Disclosure grid.
- Verify the ability to add a request for a single account number or multiple account numbers.
- Verify a requester can be selected from the Requester table or can be entered as a free-text entry.
- Verify that an account number is required for a disclosure.
- Verify the entry of data from tables in fields for Information Requested/Disclosed, Disclosure Purpose, and Disclosure Method.
- Verify the Released Date entry.
- Verify that checking the *Suspend for Accounting of Disclosure Report* checkbox suppresses the disclosure from appearing on the Accounting of Disclosures report.
- Verify the ability to select a disclosure from the Disclosure Tracking Summary and edit it.

- Verify Entered and Updated date/time/user.
- Verify Accounting of Disclosure report prints as expected.

If Disclosure Tracking will be used in areas of the hospital outside of the Health Information Management Department, add the Disclosure Tracking function to the STAR Navigator menus of those users in the ancillary departments and attach the appropriate Navigator User View. If you need to restrict viewing of disclosures based on users or departments, set the parameter in ROI User Security Parameters for each user.

- Verify users throughout the hospital can enter disclosures.
- Verify users are able to view disclosures as defined by the User Security Parameters.
- Verify disclosures entered throughout the hospital print on the Accounting of Disclosures report.

Release of Information Reports

Use the following guidelines when testing the Release of Information Reports:

- Select each of the reports and enter different criteria (date ranges, table selections, etc.). Validate that the report prints/displays the expected data.
- Export data from the display, and validate that the data is exported to the software that you chose.

Release of Information Letters/Labels

Use the following guidelines when testing the Release of Information Letters and Labels:

- Build user-defined letters.
  - Validate that the letter descriptions display on the Letters tab when the application is launched.
  - Test a user-defined letter that requires patient/request selection and one that does not. Validate that if a letter requires patient/request selection, you cannot print the letter unless a selection has been made.
- Print labels and validate that they print to the appropriate printer.

Appendix C - TROUBLESHOOTING

TROUBLESHOOTING TIPS

If the tilde (~) for the Release of Information Module is not turned “on,” the following error message is displayed when a Release of Information menu option is selected:

If GUI Chart Management is turned on for a facility, the facility can view the deficiencies entered for an account in the GUI Chart Management Module.

To verify that GUI Chart Management Module is turned on, a McKesson representative should check ~ECM,Y%.

If you are not utilizing GUI Chart Management, you cannot view deficiencies from within the Release of Information Module.

Free-formed requester entries **cannot** be selected for individual reporting but are displayed/printed when “All” is selected.

If a user is not defined in the ROI User Security Parameters as a Release of Information employee and attempts to access the ROI functions, the following message is displayed:

If a user cannot post payments or adjustments, add/edit requests, add requesters to the Requester table, and/or print reports, check the ROI User Security Parameters for that user.

Index

■ Reader Comment Form ■

We value your suggestions for improving our documentation. Please use this form to evaluate the *STAR Patient Care - Release of Information Implementation Guide* for Release 17.0.

Topic	Poor	Fair	Good	Excellent
Organization of information	❑	❑	❑	❑
Accuracy of information	❑	❑	❑	❑
Completeness of information	❑	❑	❑	❑
Clarity of information	❑	❑	❑	❑
Amount of overview information	❑	❑	❑	❑
Explanation of processes	❑	❑	❑	❑

Are there parts of this manual that could be made more helpful to you? Please explain.

Other Comments:

Thanks for your help in improving the documentation.

Your Name and Position

Hospital/Organization Name

Telephone Number

May we contact you? Yes or No (circle one)

■

McKesson
STAR 2000 Documentation Team

Fold here

Place
Stamp
Here

STAR 2000 Documentation Team
McKesson
Mail Stop ATHQ-3302
5995 Windward Parkway
Alpharetta, GA 30005

Fold here