

HealthShare Referral Manager (HSRM)

VA Employee User Guide

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Office of Information and
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Revision History

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1.1	09/15/2017	CCRA Training Team Morgan Byrd	Updates include: <ul style="list-style-type: none"> • Updated all screenshots based on new system release • Updated Figure 1 Referral Lifecycle Model • Updated Table 1 to correspond to new Figure 1 graphic • Updated Workflow 1 to correspond to new Figure 1 graphic • Updated Workflows 4,5, and 6 to correspond to new Figure 1 graphic • Added exporting function to section 5.0 C View Analytics • Added section 5.0 D Run Reports • Added section 6.1 Sort the Referral List • Added section 6.3 Tasks • Added section 6.4 Record Patient Contact
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1. Introduction

1.1. Project and Solution Overview

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

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

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

1.2. HSRM Benefits

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

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

1.3. User Guide Purpose

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

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

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

2. User Guide Overview

2.1. HSRM Lifecycle Process

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

Figure 1: Referral Lifecycle Model

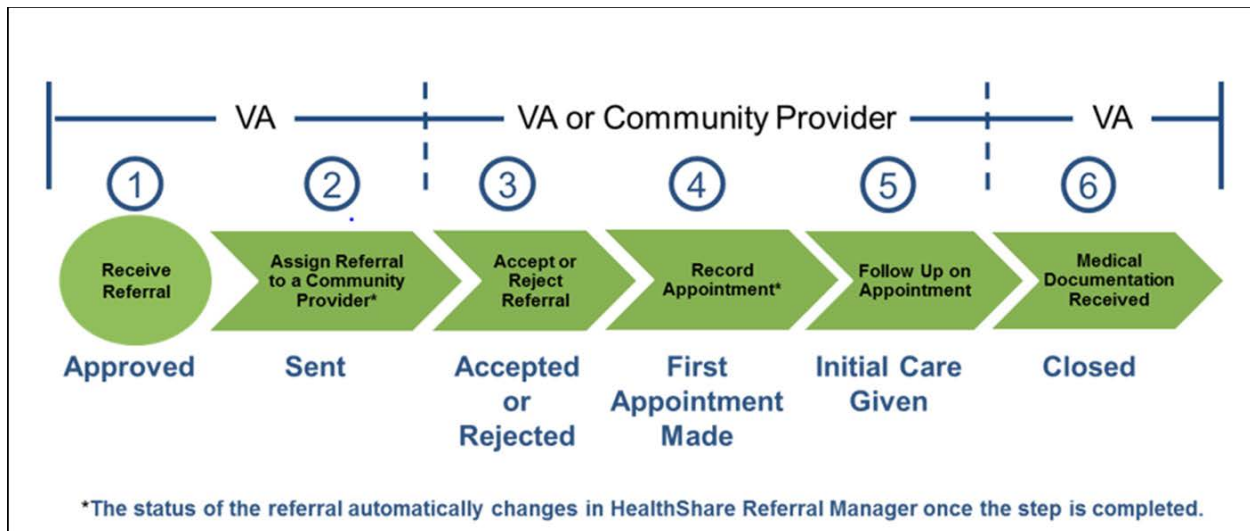



Table 1 provides a description of each step of the referral lifecycle process in HSRM. (For detailed descriptions, click the blue hyperlinks found throughout the user guide.)

Table 1: Referral Lifecycle Steps

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

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

3. HSRM Users

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

Table 2: User Roles

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

4. HSRM Account Request

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

5. HSRM Access

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

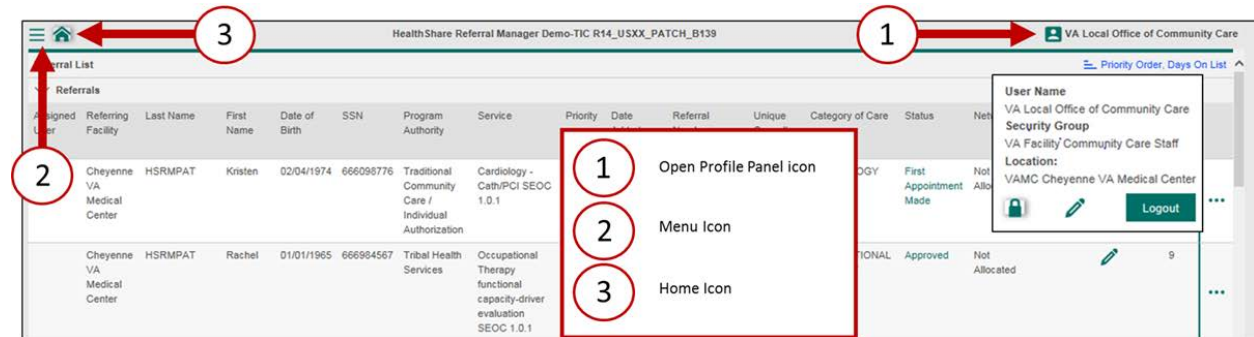
6. HSRM Essentials

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

6.1. HSRM Frame

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

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



-  **Open Profile Panel icon**

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

-  **Lock icon**

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

-  **Logout button**

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

-  **Menu icon**

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

-  **Home icon**

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

6.2. Patient Banner

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

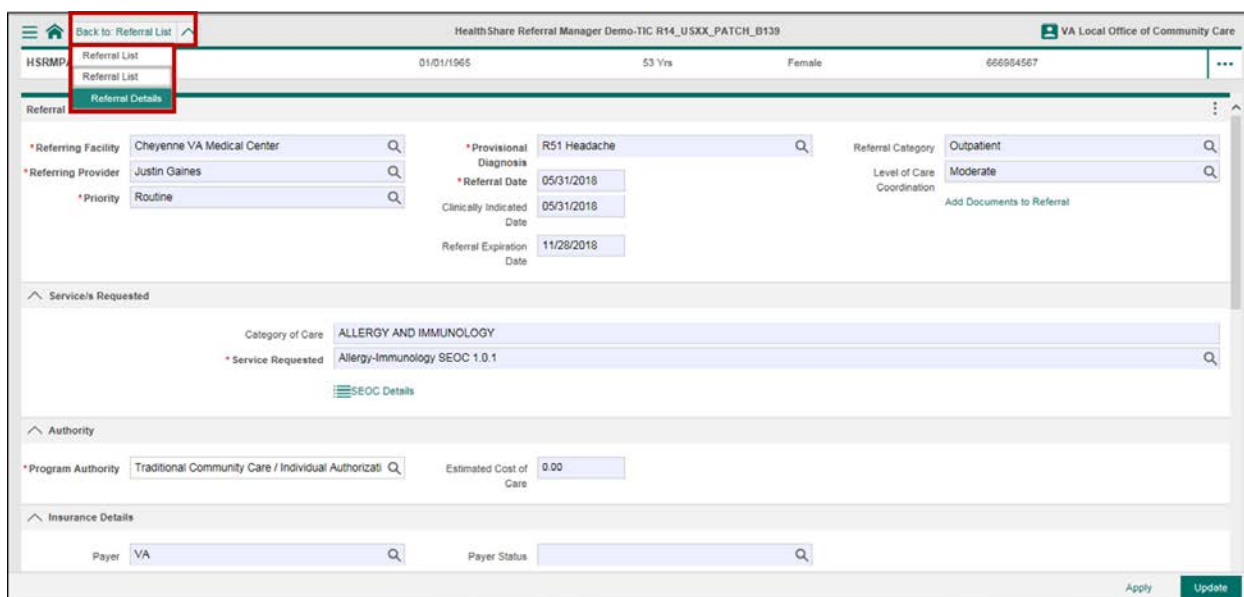
Figure 3: Referral Details Screen – Patient Banner

The screenshot displays the 'Referral Details' screen in the HealthShare Referral Manager. At the top, the Patient Banner shows patient information: HSRMPAT, Rachel; 01/01/1965; 53 Yrs; Female; 666984567. Below the banner, the 'Referral Details' section includes fields for Referring Facility (Cheyenne VA Medical Center), Referring Provider (Justin Gaines), Priority (Routine), Provisional Diagnosis (R51 Headache), Referral Date (05/31/2018), Clinically Indicated Date (05/31/2018), Referral Expiration Date, Referral Category (Outpatient), and Level of Care Coordination (Moderate). The 'Service's Requested' section shows Category of Care (OCCUPATIONAL THERAPY) and Service Requested (Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1). The 'Authority' section shows Program Authority (Tribal Health Services) and Estimated Cost of Care (0.00). The 'Insurance Details' section shows Payer (VA) and Payer Status. The screen includes an 'Apply' button and an 'Update' button.

6.3. Breadcrumb Trail/Back Feature

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

Figure 4: Referral Details Screen – Breadcrumb Trail



6.4. Mandatory Fields

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

Figure 5: Accept Task/Update Button Grayed Out



6.5. HSRM Icons

This section describes all HSRM icons.

-  **Action Menu**

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

-  **Ascending**

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

-  **Calendar**

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

-  **Canned Text**

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

-  **Component Menu**

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

-  **Descending**

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

-  **Download**

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

-  **Record Appointment**

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

-  **Magnifying Glass**

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

-  or  **Print Preview**

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

-  **Save As**

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

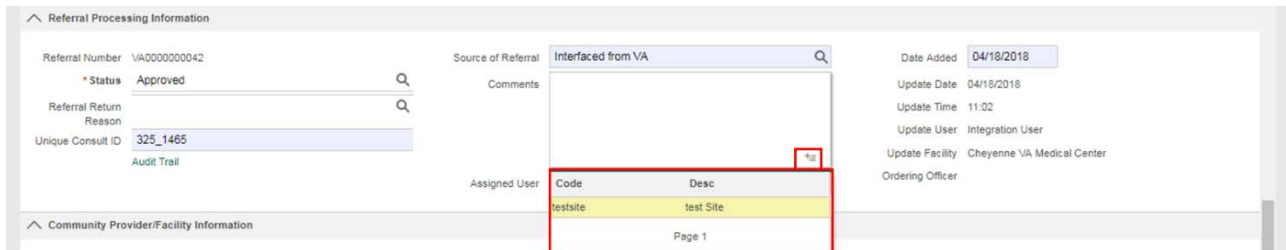
6.6. Canned Text

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

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

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

Figure 6: Referral Processing Information Section – Canned Text



6.7. Calendar Dates

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

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

6.8. Search Rules

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

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

6.9. Save Data

Use the following save methods to save data in HSRM:

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

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

6.10. HSRM Keyboard Shortcuts

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

Table 3: Windows Operating System (OS) Shortcut Keys

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

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

Table 4: Mac OS Shortcut Keys

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

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

7. Receive a Referral

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

Figure 7: Consult Toolbox – Send to HSRM for Referral

 Send to HSRM for Referral'."/>

CC MSA Elig. Verification | CC Consult Review | **Authorization** | CC MSA Pt Contacts | Appt Tracking | SAR | CC Consult Completion | Care Coordination

Authorization instructions to be included with Referral: [Clear Auth](#)

Specialty: Other: [Additional SEOCs](#)

SubSpecialty: Category of Care:

Service/Care Requested: SEOC:

Service Type:

Timeframe for episode of care not to exceed: 0 1 3 6 12 months

Authorize total of 0 visit(s)

Care must be completed by: [Cal](#)

Include Standard Authorization Language

Add the following to authorization:

Any additional treatments, procedures or referrals must have a Secondary Authorization Request submitted

Community Care Manager:

For questions, contact this number:

Upon completion of this section: Send to HSRM for Referral

8. View Other Health Insurance (OHI)

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

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

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

Figure 8: Action Menu Icon

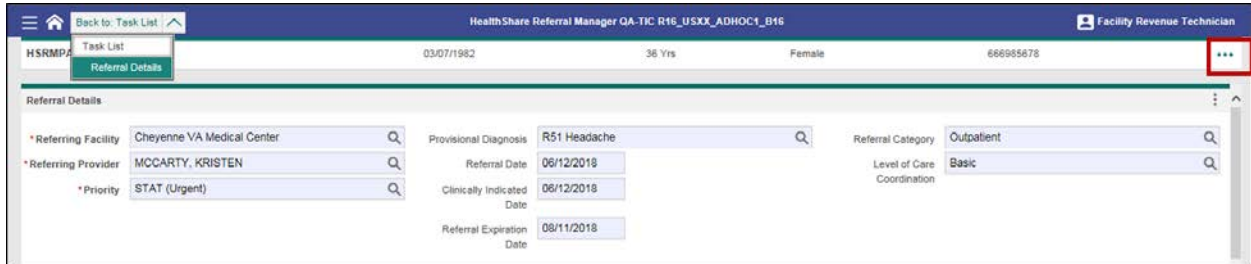
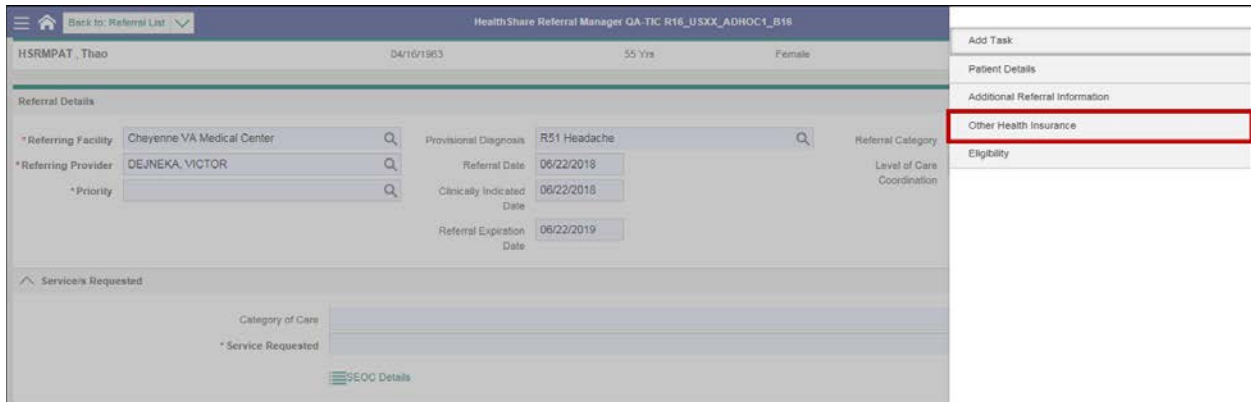
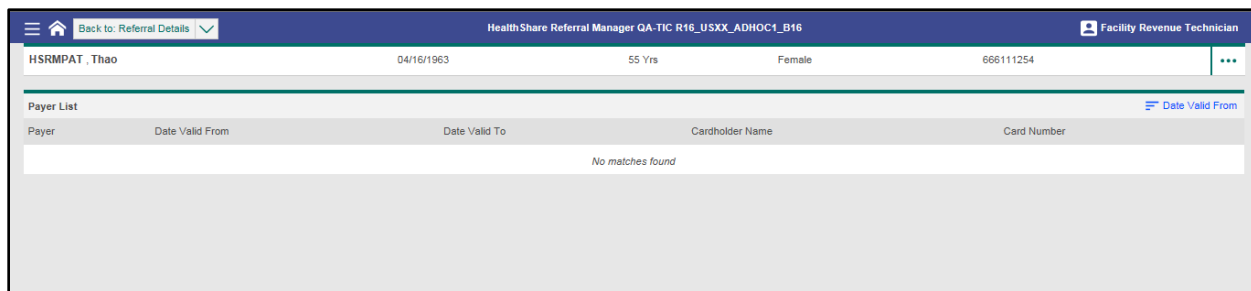


Figure 9: Referral Details Screen – Action Menu List



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

Figure 10: Other Health Insurance Screen



9. View Eligibility Form

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

To view the **Eligibility Form** screen:

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

Figure 11: Referral List – Action Menu Icon

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

Figure 12: Referral List – Menu List

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network
Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	66611244	Community Care Network	STAT (Urgent)		04/19/2018	VA0000000000	325_1476	Initial Care Given		CC Network 2
	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	66611244		Routine		04/18/2018	VA0000000042	325_1465	Approved		Not Allocated
	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	66611244		Routine		04/18/2018	VA0000000044	325_1467	Approved		Not Allocated
	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1963	66611244		Routine		04/18/2018	VA0000000045	325_1465	Approved		Not Allocated

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

Figure 13: Eligibility Form

The screenshot shows the 'Eligibility Information' section of the HealthShare Referral Manager. At the top, there is a navigation bar with a 'Back to: Referral List' dropdown, the system name 'HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139', and the user's location 'VA Local Office of Community Care'. Below this, patient information is displayed: 'HSRMPAT , Rachel', '01/01/1965', '53 Yrs', 'Female', and '666984567'. The main section is titled 'Eligibility Information' and contains a list of criteria with input fields or checkboxes:

- Eligibility - Priority Enrollment Group [input field]
- Eligibility - Current Means Test [input field]
- Eligibility - Agent Orange Exposure Indicator
- Eligibility - Combat Veteran Eligibility Indicator [input field]
- Eligibility - Combat Veteran End Date [input field]
- Eligibility - Project 112 SHAD Indicator
- Eligibility - Southwest Asian Indicator
- Eligibility - Ionizing Radiation Indicator
- Eligibility - Camp Lejeune Indicator
- Eligibility - Military Sexual Trauma - Determination Facility [input field]
- Eligibility - Military Sexual Trauma - Status [input field]
- Eligibility - Military Sexual Trauma - statusChangeDate [input field]
- Eligibility - Nose/Throat Radium Info - Determination Facility [input field]
- Eligibility - Nose/Throat Radium Info - Diagnosed with Cancer Indicator
- Eligibility - Nose/Throat Radium Info - Diagnosis Verification Date [input field]
- Eligibility - Nose/Throat Radium Info - From Aviator Service before

At the bottom right of the form, there are 'Apply' and 'Update' buttons.

10. Locate a Referral

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

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

10.1. Find Referral by Patient

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

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



Note: Menu options are based on user security rights.

Figure 14: Menu Options – Find Referral by Patient

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

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



Notes:

- When values are entered for more than one field, HSRM looks for records that match all fields. There is no “or” search available.
 - The search is case-insensitive (e.g., there is no difference between Smith, smith, and SMITH).
 - The search looks for names matching, or starting with, the value entered (e.g., entering Smith will return Smithson, but not Nesmith).
4. Click the **Find** button at the bottom right of the screen to view the list of Veterans who match the search. The resulting **Referral List** screen lists referrals that match the search criteria.

Figure 15: Patient Search Screen – Find Button

The screenshot shows the 'Patient Search' interface. At the top, there is a navigation bar with a home icon, a dropdown menu labeled 'Find Referral by Patient', the text 'HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B138', and a logo for 'VA Local Office of Community Care'. Below the navigation bar, the 'Patient Search' section contains several input fields: 'Last Name', 'First Name', 'Middle Name', 'Gender' (with a search icon), 'Date of Birth' (with a calendar icon), 'SSN', 'ICN', and 'EDIPI'. A red box highlights the 'Find' button in the bottom right corner. The footer of the page reads 'HealthShare Referral Manager'.

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



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

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

10.2. Find Referrals

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

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



Note: Menu options are based on user security rights.

2. Select **Find Referrals** from the drop-down options to navigate to the **Inquiry Selection** screen.

Figure 16: Referral List Screen – Find Referrals

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

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



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

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



Notes:

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

Figure 17: Inquiry Selection Screen

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



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

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

10.3. Referral List

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

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



Note: Menu options are based on user security rights.

2. Select **Referral List** from the drop-down options to navigate to the **Referral List** screen.
3. Locate the referral by [sorting the list](#) (e.g., Last Name, First Name).

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



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

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

11. Locate a Provider

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

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

Figure 18: Find Provider – Menu List

First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Michael	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2016	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Michael	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2016	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Michael	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2016	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated			6

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

Figure 19: Provider Search Screen

HealthShare Referral Manager QA-TIC R14_USXX_ADHOC1_B8 VA Local Office of Community Care

Provider Search

* Specialty: **Addiction Medicine**

Facility: St. Mary's Hospital

State: Maine

City: LEWISTON

Affiliation:

Care Provider Code:

First Name:

Last Name: **palmer**

Facility	Care Site	Care Provider	Address	City	State	ZIP Code	Telephone	Email
St. Mary's Hospital (PA)	St. Mary's Hospital	DAVID PALMER (PA)	102 Campus Avenue	LEWISTON	Maine	04240	207-753-4554	campus@stmarys.com

HealthShare Referral Manager

Find

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

Figure 20: Main Details Screen

Back to: Care Provider Details VA Supervisor

Main Details

* Code: **1194016774**

* Description: AARON A LAVIANA

* Date From: 01/01/2000

Date To:

Title:

Surname: LAVIANA

First Name: AARON

Other Name: A

SMC Number:

Prescriber Number:

HealthShare Referral Manager

Apply Update

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

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

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

Figure 21: Referral Details Screen – Assigned User

The screenshot shows the 'Referral Details' screen for a patient named Rachel (ID: HSRMPAT). The 'Referral Processing Information' section is expanded, showing the following details:

- Referral Number:** VAD000000003
- Status:** Approved
- Referral Return Reason:** (empty)
- Unique Consult ID:** 325_1603
- Source of Referral:** Interfaced from VA
- Comments:** (empty)
- Assigned User:** Amy VanEpps (highlighted with a red box)
- Date Added:** 05/31/2018
- Update Date:** 06/01/2016
- Update Time:** 11:29
- Update User:** CCRA Integrations Account
- Update Facility:** Cheyenne VA Medical Center
- Ordering Officer:** (empty)

At the bottom right of the screen, there are 'Apply' and 'Update' buttons.

13. Generate an Offline Referral Form

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

To generate an **Offline Referral Form**:

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

Figure 22: Referral Details Screen – Component Menu Icon

The screenshot shows the 'Referral Details' screen with the following fields and values:

- Referring Facility: Cheyenne VA Medical Center
- Referring Provider: Justin Gaines
- Priority: Routine
- Provisional Diagnosis: R51 Headache
- Referral Date: 05/31/2018
- Clinically Indicated Date: 05/31/2018
- Referral Expiration Date: (empty)
- Referral Category: Outpatient
- Level of Care Coordination: Moderate
- Service Requested: Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1
- Program Authority: Tribal Health Services
- Estimated Cost of Care: 0.00
- Payer: VA
- Payer Status: (empty)

A red box highlights a three-dot menu icon in the top right corner of the form.

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



Figure 23: Referral Details Screen – Offline Referral Form

This screenshot shows the 'Referral Details' screen with a print menu expanded on the right side. The menu options are: Print, Offline Referral Form (highlighted with a red box), Letters, and Record Appointment. The main form content is dimmed in the background.

Referral Details (Background):

- Referring Facility: Cheyenne VA Medical Center
- Referring Provider: Justin Gaines
- Priority: Routine
- Provisional Diagnosis: R51 Headache
- Referral Date: 05/31/2018
- Clinically Indicated Date: 05/31/2018
- Referral Expiration Date: 11/29/2018
- Referral Category: Outpatient
- Level of Care Coordination: Moderate
- Service Requested: Allergy-immunology SEOC 1.0.1
- Program Authority: Traditional Community Care / Individual Authorizati
- Estimated Cost of Care: 0.00
- Payer: VA
- Payer Status: (empty)

Figure 24: Offline Referral Form

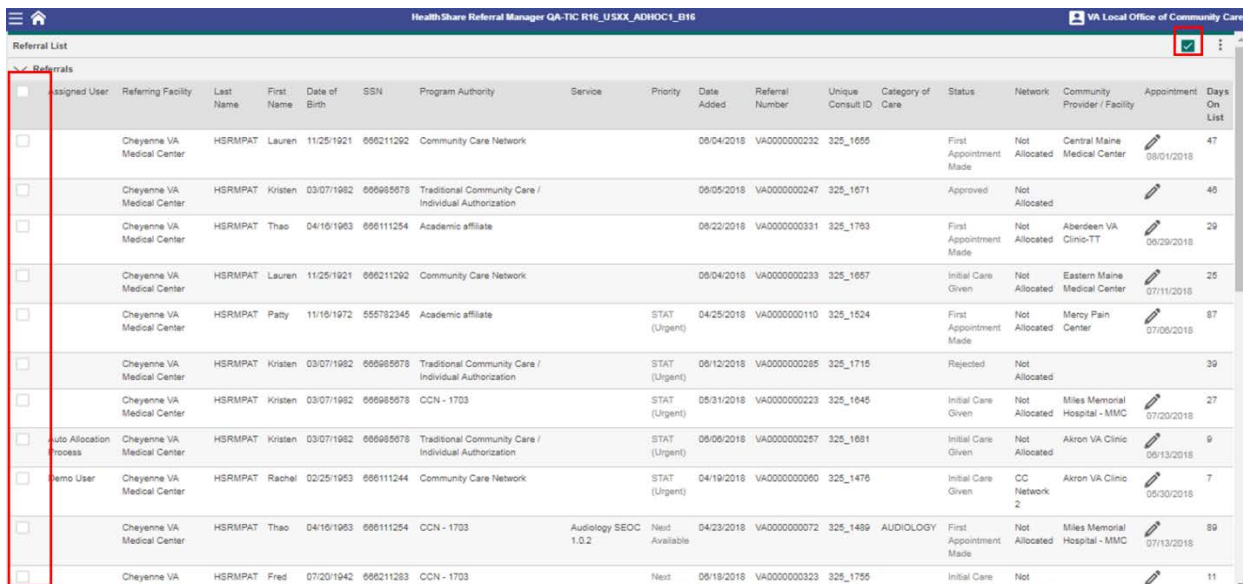
 	U.S. Department of Veterans Affairs	VHA Approved Referral for Medical Care
	Veteran Name: HSRMPAT Rachel Veteran ICN: 5000002786V903488 Veteran EDIPI: 101077 Veteran Date of Birth: 1965-01-01 Veteran Address: Veteran Phone Number:	Referral Number: VA0000000003 Priority: Routine Referral Category: Outpatient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

13.1. Generate Multiple Offline Referral Forms

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

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

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



Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	880211292	Community Care Network			08/04/2018	VA00000000232	325_1655		First Appointment Made	Not Allocated	Central Maine Medical Center	08/01/2018	47	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	880985978	Traditional Community Care / Individual Authorization			08/05/2018	VA00000000247	325_1671		Approved	Not Allocated			46	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	880111254	Academic affiliate			08/22/2018	VA00000000331	325_1763		First Appointment Made	Not Allocated	Aberdeen VA Clinic-TT	08/29/2018	29	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	880211292	Community Care Network			08/04/2018	VA00000000233	325_1657		Initial Care Given	Not Allocated	Eastern Maine Medical Center	07/11/2018	25	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Patty	11/16/1972	555782345	Academic affiliate		STAT (Urgent)	04/25/2018	VA00000000110	325_1524		First Appointment Made	Not Allocated	Mercy Pain Center	07/06/2018	87	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	880985978	Traditional Community Care / Individual Authorization		STAT (Urgent)	08/12/2018	VA00000000285	325_1719		Rejected	Not Allocated			39	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	880985978	CCN - 1703		STAT (Urgent)	08/31/2018	VA00000000223	325_1645		Initial Care Given	Not Allocated	Miles Memorial Hospital - MMC	07/20/2018	27	
<input type="checkbox"/>	Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	880985978	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/09/2018	VA00000000257	325_1681		Initial Care Given	Not Allocated	Akron VA Clinic	08/13/2018	9
<input type="checkbox"/>	Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachel	02/25/1953	880111244	Community Care Network		STAT (Urgent)	04/19/2018	VA00000000080	325_1476		Initial Care Given	CC Network 2	Akron VA Clinic	05/30/2018	7
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	880111254	CCN - 1703	Audiology SEOC 1.0.2	Next Available	04/23/2018	VA00000000072	325_1489	AUDIOLOGY	First Appointment Made	Not Allocated	Miles Memorial Hospital - MMC	07/13/2018	89	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	880211283	CCN - 1703		Next Available	08/18/2018	VA00000000323	325_1755		Initial Care Given	Not Allocated			11	

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

Figure 26: Referral List Screen – Component Menu

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	898211292	Community Care Network			05/04/2018	VA0000000232	325_1656		First Appointment Made	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization			06/05/2018	VA0000000247	325_1671		Approved	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	898111254	Academic affiliate			06/22/2018	VA0000000331	325_1763		First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	898211292	Community Care Network			05/04/2018	VA0000000233	325_1657		Initial Care Given	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Patty	11/18/1972	855782345	Academic affiliate		STAT (Urgent)	04/25/2018	VA0000000110	325_1524		First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/12/2018	VA0000000260	325_1715		Rejected	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	CCN - 1703		STAT (Urgent)	05/31/2018	VA0000000223	325_1646		Initial Care Given	
<input type="checkbox"/>	Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/08/2018	VA0000000257	325_1681		Initial Care Given
<input type="checkbox"/>	Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachal	02/25/1953	898111244	Community Care Network		STAT (Urgent)	04/19/2018	VA0000000060	325_1476		Initial Care Given
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	898111254	CCN - 1703	Audiology SEOC 1.0.2	Next Available	04/23/2018	VA0000000072	325_1499	AUDIOLOGY	First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	898211293	CCN - 1703		Next Available	06/18/2018	VA0000000323	325_1756		Initial Care Given	

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

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

Figure 27: Referral List Screen – Component Menu

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	898211292	Community Care Network			05/04/2018	VA0000000232	325_1656		First Appointment Made	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization			06/05/2018	VA0000000247	325_1671		Approved	
<input checked="" type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	898111254	Academic affiliate			06/22/2018	VA0000000331	325_1763		First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Lauren	11/25/1921	898211292	Community Care Network			05/04/2018	VA0000000233	325_1657		Initial Care Given	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Patty	11/18/1972	855782345	Academic affiliate		STAT (Urgent)	04/25/2018	VA0000000110	325_1524		First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/12/2018	VA0000000260	325_1715		Rejected	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	CCN - 1703		STAT (Urgent)	05/31/2018	VA0000000223	325_1646		Initial Care Given	
<input type="checkbox"/>	Auto Allocation Process	Cheyenne VA Medical Center	HSRMPAT	Kristen	03/07/1982	899898978	Traditional Community Care / Individual Authorization		STAT (Urgent)	06/08/2018	VA0000000257	325_1681		Initial Care Given
<input type="checkbox"/>	Demo User	Cheyenne VA Medical Center	HSRMPAT	Rachal	02/25/1953	898111244	Community Care Network		STAT (Urgent)	04/19/2018	VA0000000060	325_1476		Initial Care Given
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Thao	04/16/1983	898111254	CCN - 1703	Audiology SEOC 1.0.2	Next Available	04/23/2018	VA0000000072	325_1499	AUDIOLOGY	First Appointment Made	
<input type="checkbox"/>	Cheyenne VA Medical Center	HSRMPAT	Fred	07/20/1942	898211293	CCN - 1703		Next Available	06/18/2018	VA0000000323	325_1756		Initial Care Given	

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

Figure 28: Multiple Offline Referral Forms Document

Veteran Approved Referrals for Medical Care Cover Page

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

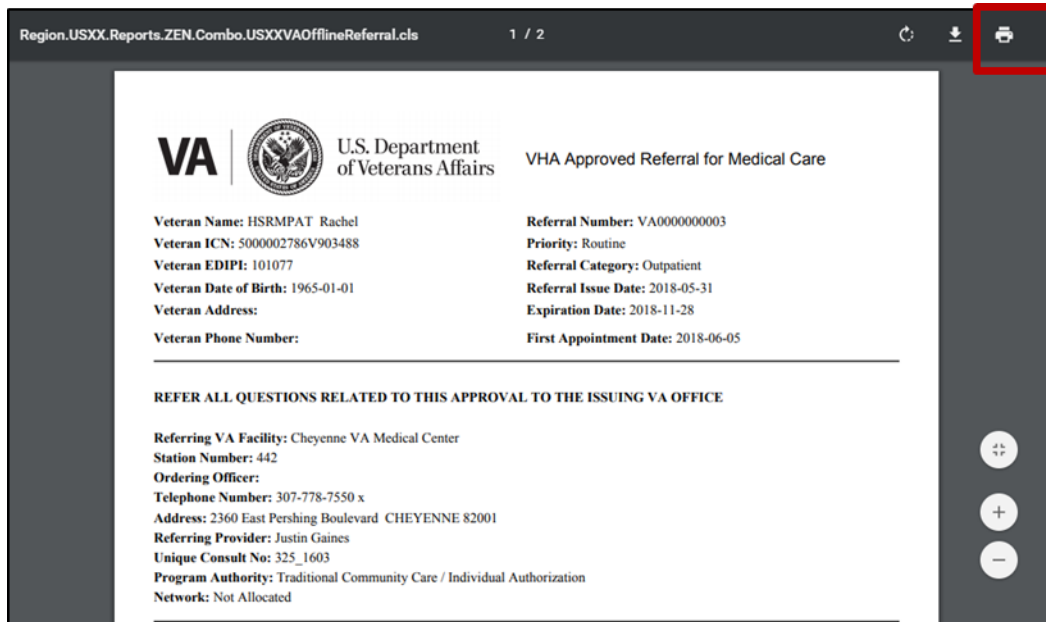
13.2. Print an Offline Referral Form

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

13.2.1. Print an Offline Referral Form in Chrome

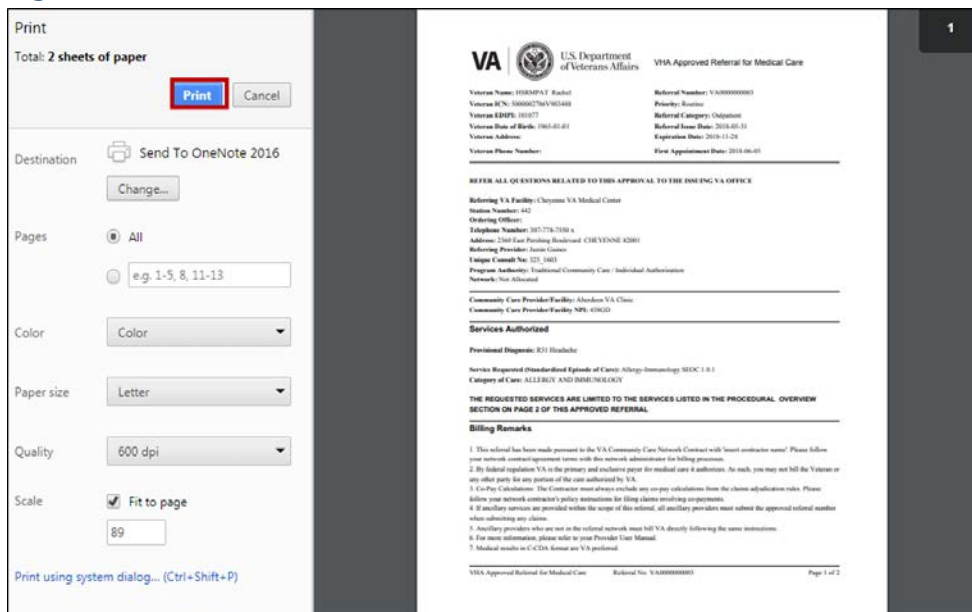
1. Navigate to the [Offline Referral Form](#).
2. Click the **Print** icon in the top right of the **Offline Referral Form**. The **Print** window appears.

Figure 29: Offline Referral Form in Chrome – Print Icon



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

Figure 30: Print Screen in Chrome – Print Button



13.2.2. Print an Offline Referral Form in Internet Explorer

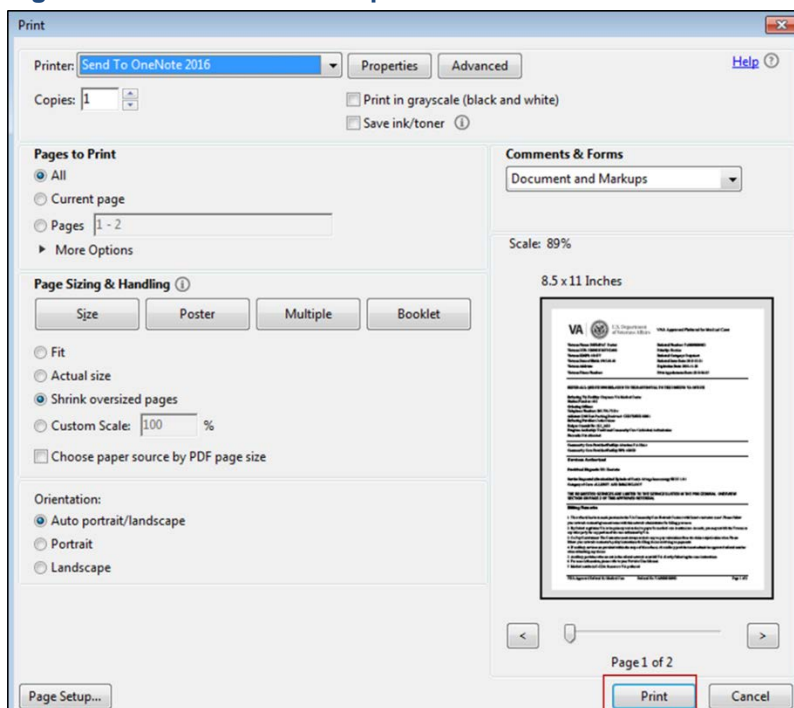
1. Navigate to the [Offline Referral Form](#).
2. Click the **Print File** icon on the bottom of the **Offline Referral Form**. The **Print** window appears.

Figure 31: Offline Referral Form in Explorer – Print Icon

The screenshot shows the top portion of a web form. On the left is the VA logo and the text "U.S. Department of Veterans Affairs". To the right is the title "VHA Approved Referral for Medical Care". Below this is a two-column list of fields: "Veteran Name: HSRMPAT Rachel", "Veteran ICN: 5000002786V903488", "Veteran EDIPI: 101077", "Veteran Date of Birth: 1965-01-01", "Veteran Address:", "Veteran Phone Number:", "Referral Number: VA0000000003", "Priority: Routine", "Referral Category: Outpatient", "Referral Issue Date: 2018-05-31", "Expiration Date: 2018-11-28", and "First Appointment Date: 2018-06-05". Below the form fields is a horizontal line, followed by the text "REFER ALL QUESTIONS RELATED TO THIS APPROVAL TO THE ISSUING VA OFFICE". At the bottom left, it says "Referring VA Facility: Cheyenne VA Medical Center" and "Station Number: 442". At the bottom center, there is a toolbar with a print icon (a printer) highlighted with a red box, along with other navigation icons and a page indicator "1 (1 of 2)".

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

Figure 32: Print Screen in Explorer – Print Button



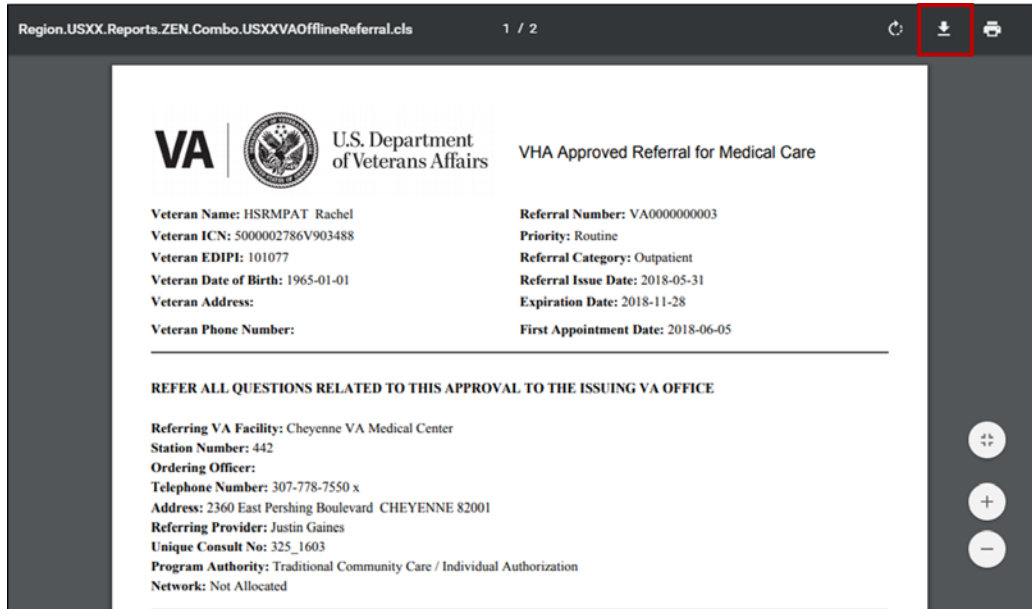
13.3. Download an Offline Referral Form

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

13.3.1. Download an Offline Referral Form in Chrome

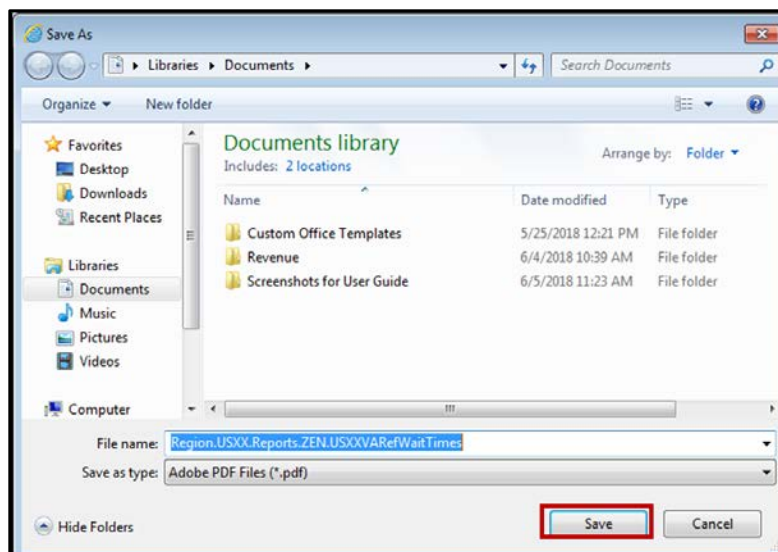
1. Click the **Download** icon in the top right of the **Offline Referral Form**. The **Save As** window appears.

Figure 33: Offline Referral Form in Chrome – Download Icon



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

Figure 34: Save As Window in Chrome – Save Button



13.3.2. Download an Offline Referral Form in Explorer

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

Figure 35: Offline Referral Form in Explorer

VA |  U.S. Department of Veterans Affairs

VHA Approved Referral for Medical Care

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

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

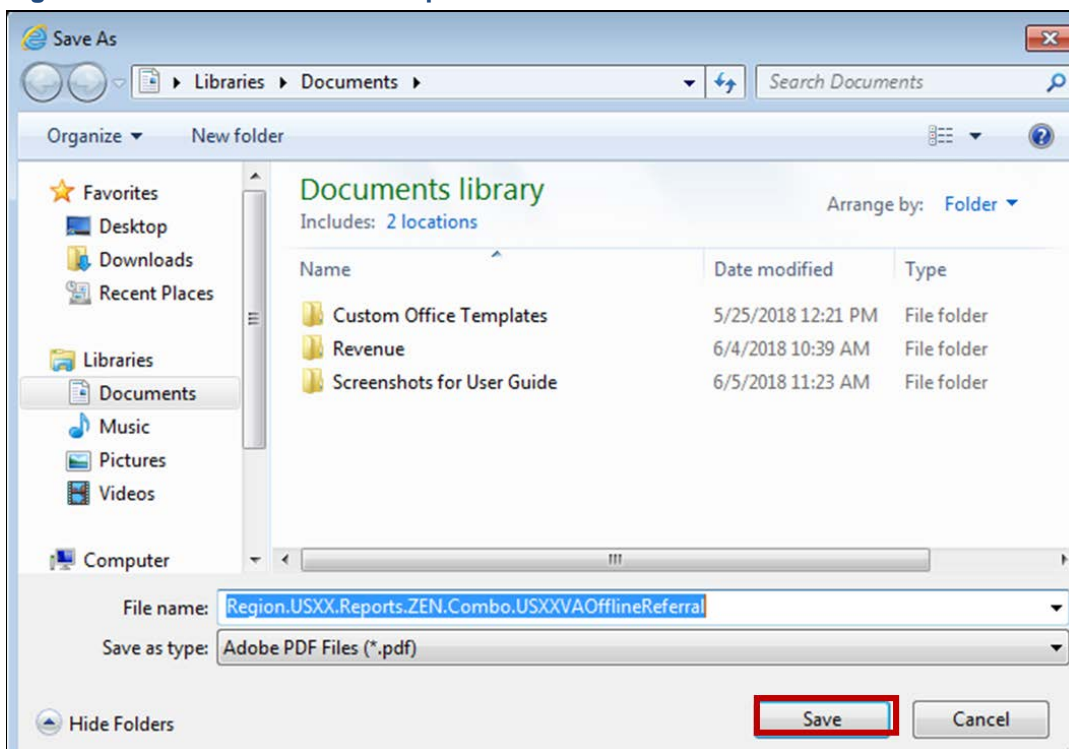
REFER ALL QUESTIONS RELATED TO THIS APPROVAL TO THE ISSUING VA OFFICE

Referring VA Facility: Cheyenne VA Medical Center
Station Number: 442



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

Figure 36: Save As Window in Explorer – Save Button



14. Sort a List

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

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

To conduct an advanced sort:

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

Figure 37: Referral List Screen – Status

The screenshot shows the 'Referral List' screen in the HealthShare Referral Manager. A table lists referrals with columns for Assigned User, Referring Facility, Last Name, First Name, Date of Birth, SSN, Program Authority, Service, Priority, Date Added, Referral Number, Unique Consult ID, Category of Care, Status, Network, Community Provider / Facility, Appointment, and Days On List. A red box highlights the 'Status' column header, which includes a dropdown arrow icon.

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMUATPAT	Patty		06/04/1982	666111274	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	06/01/2018	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Accepted	Not Allocated	Hospital of the University of Pennsylvania	06/20/2018	7
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			8
Cheyenne VA Medical Center	HSRMPAT	Rachel		01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			8

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

Figure 38: Referral List Screen – Sorting Options

The screenshot shows the 'Referral List' screen with the 'Sort' dropdown menu open. The menu lists various sorting options, each with an ascending and descending icon. A red box highlights the 'Priority Order' option, and another red box highlights the 'Days On List' option under the 'Secondary Sort' section.

Sort	Ascending	Descending
Priority Order	▲	▼
Days On List	▲	▼
Date of Birth	▲	▼
Date Added	▲	▼
Community Provider / Facility	▲	▼
Network	▲	▼
Last Name	▲	▼
First Name	▲	▼
SSN	▲	▼
Priority	▲	▼
Referring Facility	▲	▼
Service	▲	▼
Status	▲	▼
Assigned User	▲	▼
Referral Number	▲	▼
Program Authority	▲	▼
Unique Consult ID	▲	▼
Secondary Sort		
Days On List	▲	▼
Date of Birth	▲	▼



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

15. Manage Tasks

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

15.1. View a Task List

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

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

Figure 39: Referral List Screen – Task List

First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Isabel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2015	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Isabel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2015	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6
Isabel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2015	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated			6
Isabel	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2015	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated			6
Isabel	06/04/1982	66611274	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC	Routine	06/01/2015	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Rejected	Not Allocated	Hospital of the University of Pennsylvania	06/20/2015	5

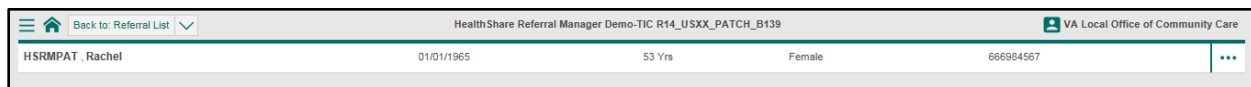
15.2. Add a Task

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

15.2.1. Add a Task from the Referral Details Screen

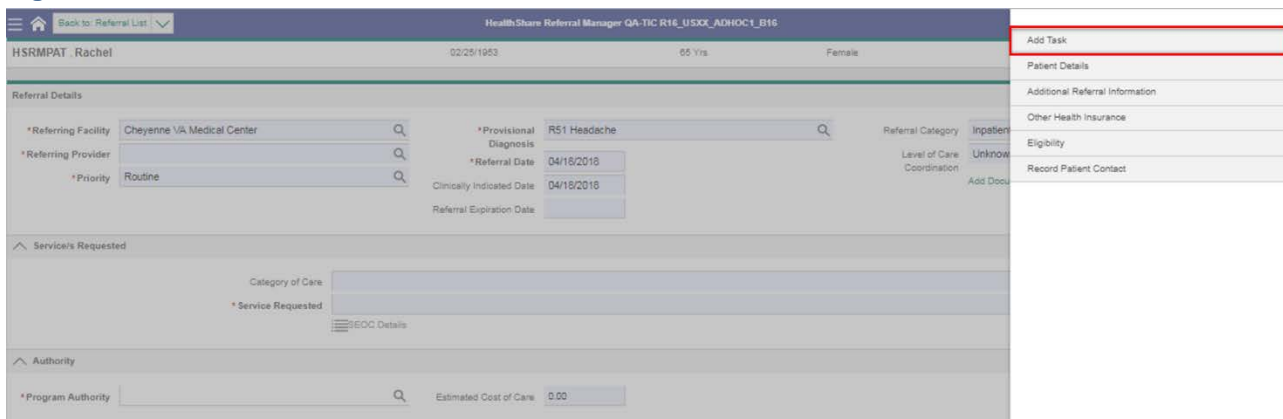
1. [Locate the referral](#) and navigate to the **Referral Details** screen.
2. Click the **Action Menu** icon in the top right of the **Patient Banner** to access the **Action Menu** drop-down list.

Figure 40: Patient Banner – Action Menu



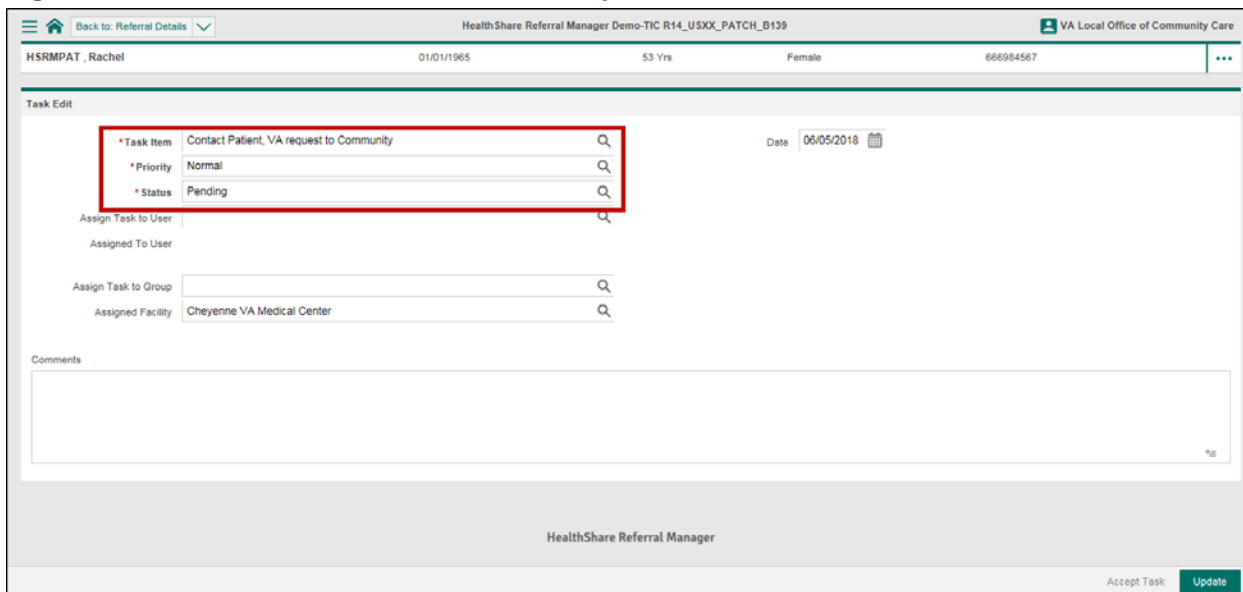
3. Select **Add Task** from the drop-down menu. The **Task Edit** screen appears.

Figure 41: Referral Details Screen – Add Task



4. Complete the [Task Edit screen](#).

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



15.2.2. Add a Task from the Referral List Screen

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

Figure 43: Referral List Screen – Action Menu

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

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

15.3. Complete the Add Task Screen

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

1. [Navigate to the Add Task screen.](#)



*Note: **Task Priority, Status, Start Date, and Time** are mandatory fields and auto-populate. These fields can be edited. Mandatory fields are noted by the red asterisk.*

2. Click the **Magnifying Glass** icon within each field to view and select available options.

Figure 44: Task Edit Screen – Assign Task

HSRMPAT, Rachel | 01/01/1965 | 53 Yrs | Female | 666984567

* Priority: Normal | * Status: Pending

Assign Task to User: [Dropdown Menu Open]

Description	Code
Amy VanEpps	Amy.VanEpps@va.gov
Antonio Armstrong	Antonio.Armstrong2@va.gov
Ashley Brooks	Ashley.Brooks2@va.gov
Aszur Rollins	Aszur.Rollins@va.gov
Auto Allocation Process	AAP
Bonnie Lupo	Bonnie.Lupo@va.gov
Brend Andrew	Brend.Andrew@va.gov
Catherine Burk	Catherine.Burk2@va.gov
CCRA Integrations Account	ccraint
Clinical Integration	CI
Community	Community
Community Clinician	ccp
Community Network Provider	cn
Community Staff Member	ccss
Corey Wilson	Corey.Wilson2@va.gov

Page 1 | Next

Accept Task | Update

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

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

15.4. Assign a User to a Task

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

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

Figure 46: Referral List Screen – Task List

First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List	
Rachel	01/01/1965	66694567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	...	
Rachel	01/01/1965	66694567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated		6	...	
Rachel	01/01/1965	66694567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Approved	Not Allocated		6	...	
etty	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated		6	...	
etty	06/04/1982	666111274	Traditional Community Care / Individual	Occupational Therapy functional capacity-driver	Routine	06/01/2018	VA0000000006	325_1606	OCCUPATIONAL THERAPY	Rejected	Not Allocated	Hospital of the University of Pennsylvania	06/20/2018	5	...

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



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

Figure 47: Task List Screen – Task: Add Documentation

Start Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Last Name	First Name	Gender	Date of Birth	Completed	Comments
06/04/2018 11:58	Add Documentation, Community request to VA	Pending	Normal	Training User 35		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	upload SAR
06/04/2018 12:02	Add Documentation, Community request to VA	Pending	Normal	Training User 36		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	Review SAR.
06/04/2018 12:48	Add Documentation, Community request to VA	Pending	Normal	Community		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	SAR is needed for Pa...
06/04/2018 20:44	Review Medical Documents from Community	Pending	Normal		VA Facility Community Care Staff	Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	

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



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

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

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

Task Edit

* Task Item: Add Documentation, Community request to VA

Date: 06/04/2018

* Priority: Normal

* Status: Pending

Assign Task to User

Assigned To User: Training User 35 X

Assign Task to Group:

Assigned Facility: Cheyenne VA Medical Center

Comments: upload SAR

HealthShare Referral Manager

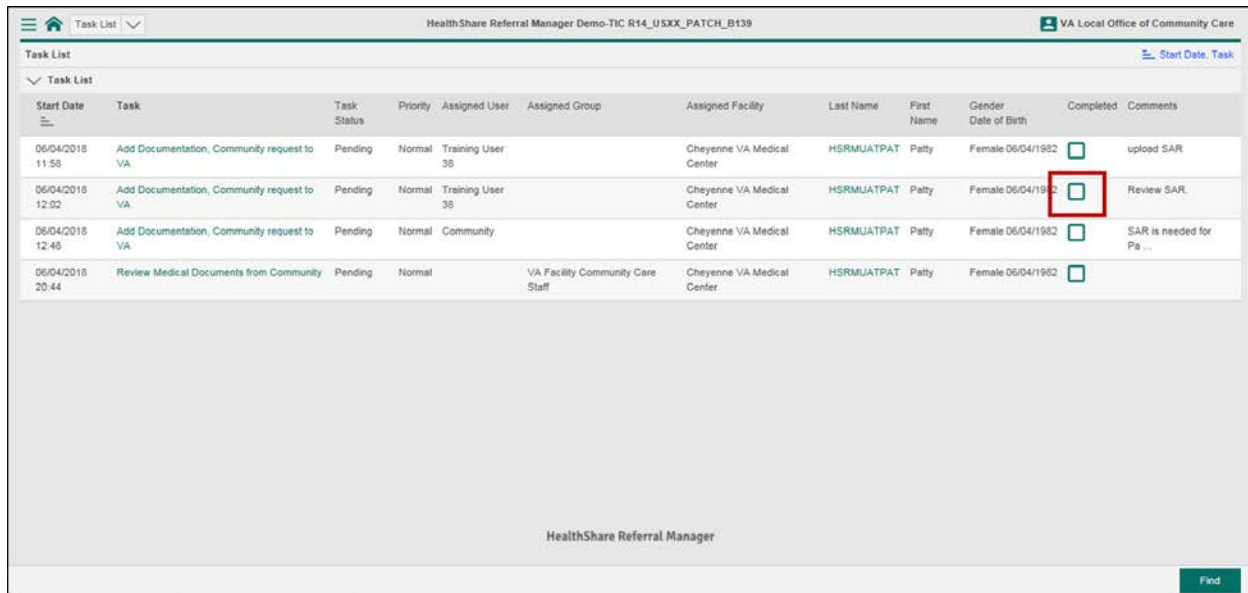
Accept Task

15.5. Complete a Task

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

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

Figure 49: Task List Screen – Completed Checkbox



Start Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Last Name	First Name	Gender	Date of Birth	Completed	Comments
06/04/2018 11:58	Add Documentation, Community request to VA	Pending	Normal	Training User 38		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	upload SAR
06/04/2018 12:02	Add Documentation, Community request to VA	Pending	Normal	Training User 38		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input checked="" type="checkbox"/>	Review SAR.
06/04/2018 12:48	Add Documentation, Community request to VA	Pending	Normal	Community		Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	SAR is needed for Pa...
06/04/2018 20:44	Review Medical Documents from Community	Pending	Normal		VA Facility Community Care Staff	Cheyenne VA Medical Center	HSRMJATPAT	Patty	Female	06/04/1982	<input type="checkbox"/>	

15.6. Automated Tasks

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

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

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

16. View Referral Details

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

Figure 50: Referral Details Screen – Processing and Treatment Details

16.1. View Additional Referral Information

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

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

To view additional referral information:

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

Figure 51: Referral List – Action Menu Icon

The screenshot shows the 'Referral List' interface. At the top, there is a navigation bar with 'Referral List' and 'VA Local Office of Community Care'. Below this is a table of referrals. The table has columns for Assigned User, Referring Facility, Last Name, First Name, Date of Birth, SSN, Program Authority, Service, Priority, Date Added, Referral Number, Unique Consult ID, Category of Care, Status, Network, Community Provider / Facility, Appointment, and Days On List. Two rows are visible, both for 'Cheyenne VA Medical Center' and 'Rachel' (DOB: 01/01/1965, SSN: 666984567). The first row has a 'Tribal Health Services' program authority and 'Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1' service. The second row has a 'Traditional Community Care / Individual Authorization' program authority and the same service. In the 'Days On List' column, the value is '6'. To the right of each row is an action menu icon (three dots) highlighted with a red box.

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

Figure 52: Referral List – Action Menu List

The screenshot shows the 'Referral List' interface with the action menu list open. The menu items are: Add Task, Patient Details, Additional Referral Information (highlighted in red), Other Health Insurance, Eligibility, and Record Patient Contact. The table below the menu shows a list of referrals for 'Rachel' (DOB: 02/25/1963, SSN: 66611244). The first row is highlighted in green and shows a 'STAT (Urgent)' referral on 04/19/2018. The other rows show 'Routine' referrals on 04/19/2018.

Figure 53: Additional Referral Information Screen

The screenshot shows the 'Additional Referral Information' screen. At the top, there is a navigation bar with 'Back to: Referral Details' and 'VA Local Office of Community Care'. Below this is a patient summary section with fields for 'HSRMPAT , Rachel', '01/01/1965', '53 Yrs', 'Female', and '666984567'. Below the summary are several sections: 'Patient Contacts' with an inquiry date of '06/05/2018 15:51' at 'Cheyenne VA Medical Center'; 'Appointments' with a date of '06/05/2018' at '02:00' for 'Labs/diagnostic studies relevant to the patient complaint/condition' by 'Christopher Miller'; 'Documents' with a message 'No matches found'; and 'Referral: Notes' with a note from 'AUTHOR--GAINES,JUSTIN' dated '05/31/2018' at '16:15'.

17. View SEOC Information

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

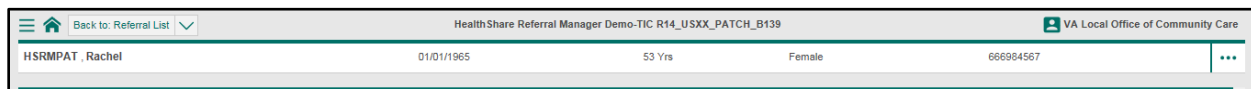
There are two ways to view SEOC information. To view all SEOCs related to the referral, use the **Patient Details** screen. To view SEOCs related to the referral currently being viewed, use the **Referral Details** screen.

17.1. View Additional SEOC Information from the Patient Details Screen

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

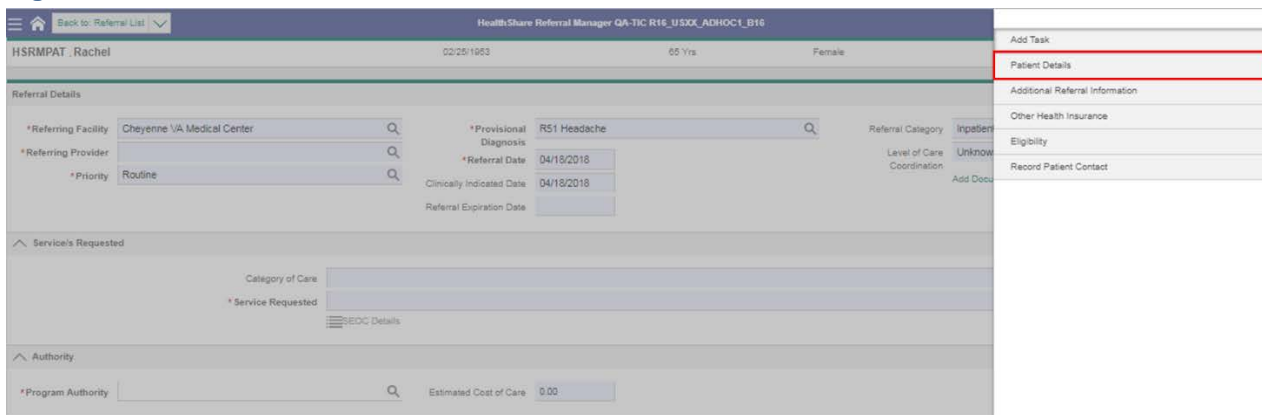
1. [Locate the referral](#) and navigate to the **Referral Details**.
2. Click the **Action Menu** icon in the top right of the **Patient Banner** to access the **Action Menu** drop-down list.

Figure 54: Patient Banner – Action Menu



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

Figure 55: Menu List – Patient Details



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

Figure 56: Patient Details – SEOC

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

Figure 57: SEOC List – Preauthorization Details

SEOC Details	Description	Referral Start Date	Referral Expiration Date	Comments
	Allergy-Immunology SEOC 1.0.1	06/01/2018	11/28/2018	**Additional consultations needed relevant to the patient complaint/condition require VA review and approval. **DME, prosthetics and orthotics orders must be submitted to the local VA facility prosthetics department for provision. **All routine medications must be faxed/sent to the VA to be dispensed by the VA. Urgent/emergent prescriptions can be provided for a 14-day supply only. The Veteran will be required to pay out of pocket for any urgent/emergent medications and can submit a reimbursement request to their local VA facility.

Figure 58: List of SEOC Services

SEOC Service	Quantity Limit	Quantity Consumed
Labs/diagnostic studies relevant to the patient complaint/condition	8	
Pathology services relevant to the patient complaint/condition	8	
RAST testing	8	
Procedures to include allergen skin testing relevant to the patient complaint/condition	8	
Seven (7) follow-up visits for this episode of care	8	
Follow up biopsy if clinically indicated	8	

17.2. View Additional SEOC Information from the Referral Details Screen

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

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

Figure 59: Referral Details Screen – SEOC Details Link

The screenshot shows the 'Referral Details' screen for patient HSRMPAT_Kristen. The 'Services Requested' section is expanded to show 'Cardiology - Cath/PCI SEOC 1.0.1'. A red box highlights the 'SEOC Details' link. Other visible fields include 'Referring Facility: Cheyenne VA Medical Center', 'Referring Provider: KRISTEN MCCARTY', 'Provisional Diagnosis: R079 Chest pain, unspecified', and 'Referral Date: 06/05/2018'.

3. The **List of SEOC Services** screen appears.

Figure 60: SEOC Services Screen

The screenshot shows the 'SEOC Services' screen. A red box highlights the 'SEOC Service' link. Below it is a table with the following structure:

SEOC Service	Quantity Limit	Quantity Consumed
Diagnostic imaging relevant to the patient complaint/condition		
Diagnostic studies and labs relevant to the patient complaint/condition		
One cardiac catheterization and PCI		
One cardiac catheterization and PCI		
Pre-operative medical and cardiac clearance as indicated, to include H+P/labs, EKG, CXR		
Inpatient admission for overnight stay following PCI		
Cardiac rehabilitation, up to 36 visits, no more than 3x per week		
Six Cardiology follow-up visits for this episode of care, as clinically indicated		

18. Add Documents

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

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

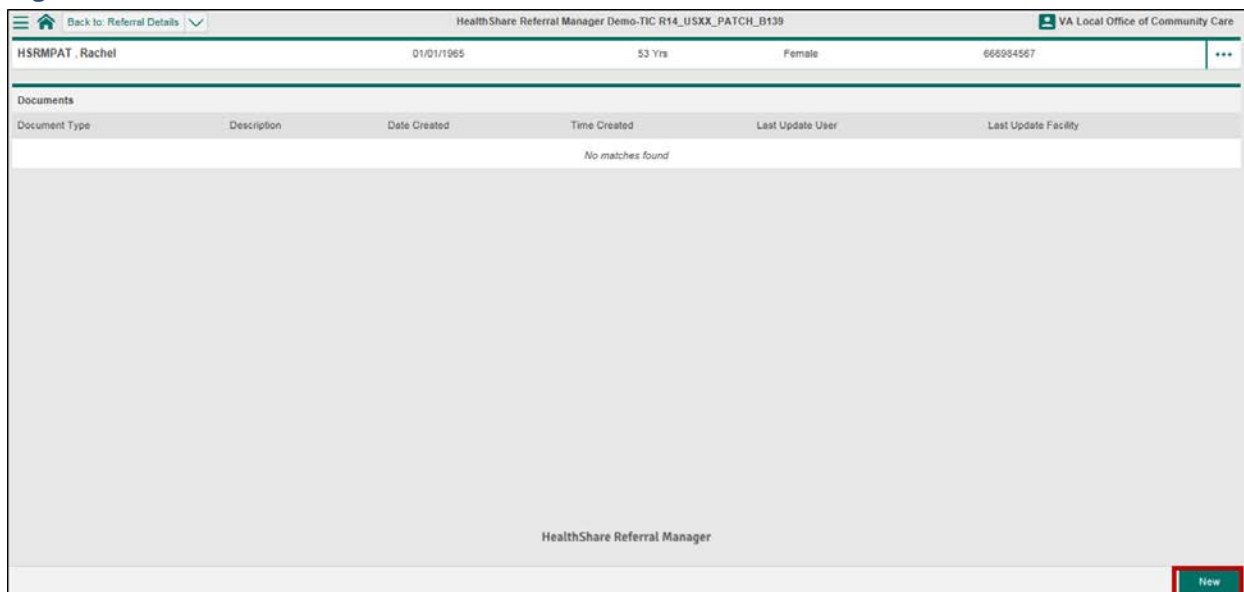
1. [Locate the referral.](#)
2. Click the **Add Documents to Referral** link to open the **Documents** screen. Facility community care staff can locate the link in the **Referral Details** section; community providers can locate the link in the **Treatment Information** section on the **Referral Details**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

Figure 61: Referral Details Screen – Add Documents

The screenshot displays the 'Referral Details' screen in the HealthShare Referral Manager. At the top, there is a navigation bar with a home icon, a 'Back to: Referral List' dropdown, the system name 'HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139', and the user's location 'VA Local Office of Community Care'. Below this, patient information is shown: 'HSRMPAT, Rachel', '01/01/1965', '53 Yrs', 'Female', and '666984567'. The main section is titled 'Referral Details' and contains several input fields: '* Referring Facility' (Cheyenne VA Medical Center), '* Referring Provider' (Justin Gaines), '* Priority' (Routine), '* Provisional Diagnosis' (R51 Headache), '* Referral Date' (05/31/2018), 'Clinically Indicated Date' (05/31/2018), 'Referral Expiration Date', 'Referral Category' (Inpatient), and 'Level of Care Coordination' (Moderate). A red box highlights the 'Add Documents to Referral' link in the 'Level of Care Coordination' section. Below this, there are sections for 'Service/s Requested' (Occupational Therapy), 'Authority' (Traditional Community Care / Individual Authorizati), and 'Insurance Details' (Payer: VA, Payer Status). At the bottom right, there are 'Apply' and 'Update' buttons.

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

Figure 62: Documents Screen – New Button



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



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

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



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

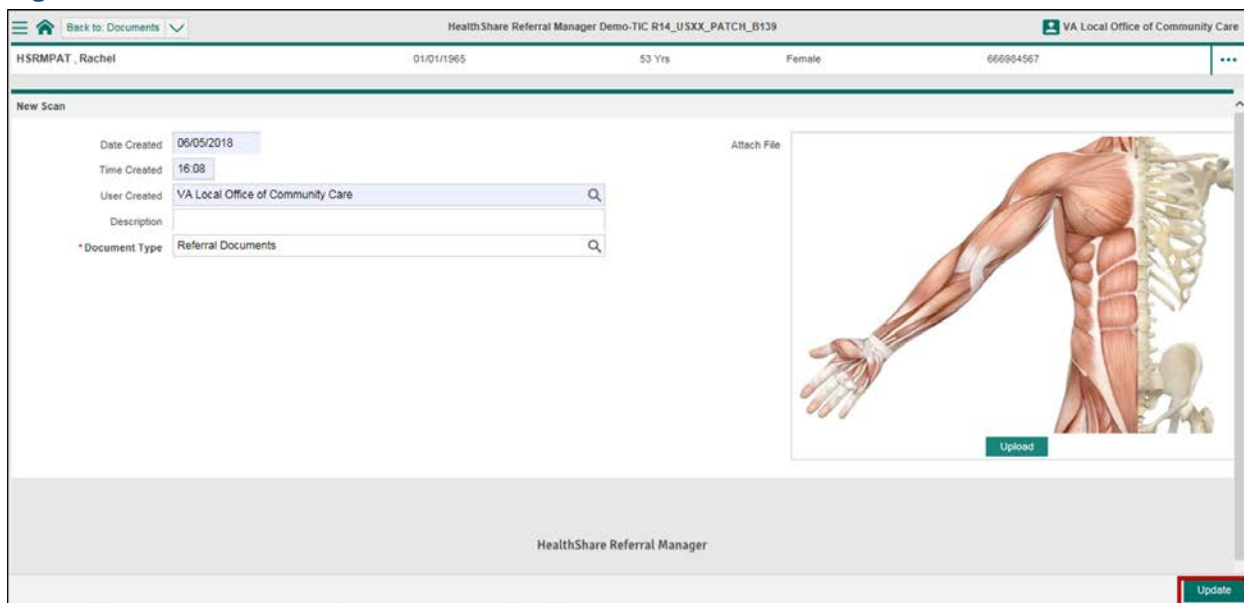
6. Select the file from the computer's hard drive.



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

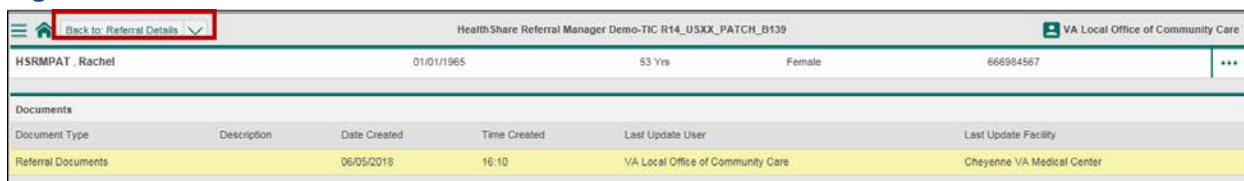
7. Click the **Update** button at the bottom right of the screen to save.

Figure 63: New Scan Screen – Attach File



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

Figure 64: Documents List Screen – Back to Referral Details



19. Record Patient Contact

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

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

Figure 65: Patient Referral List – Referral

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Cheyenne VA Medical Center	HSRMPAT	Kristen	02/04/1974	666098776	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Made	Not Allocated		06/05/2018	0	
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	
Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			6	
Cheyenne VA Medical Center	HSRMPAT	Patty	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated			6	

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

Figure 66: Referral Details Screen – Action Menu

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

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

Figure 67: Action Menu – Record Patient Contact

HealthShare Referral Manager QA-TIC R16_USXX_ADHOC1_B16

HSRMPAT Rachel 02/25/1963 65 Yrs Female

Referral Details

* Referring Facility: Cheyenne VA Medical Center
 * Referring Provider: [Search]
 * Priority: Routine
 * Provisional Diagnosis: R51 Headache
 * Referral Date: 04/18/2018
 Clinically Indicated Date: 04/18/2018
 Referral Expiration Date: [Search]

Service/s Requested

Category of Care: [Search]
 * Service Requested: [Search]
 SEOC Details: [Search]

Authority

* Program Authority: [Search] Estimated Cost of Care: 0.00

- Add Task
- Patient Details
- Additional Referral Information
- Other Health Insurance
- Eligibility
- Record Patient Contact**
- Add Doc

5. Enter the patient contact information.

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

Figure 68: Inquiry Contact Screen – Update

20. Assign a Referral to a Community Provider/Facility

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

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



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

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

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



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

Figure 70: Referral Details Screen – Network Field

The screenshot shows the 'Community Provider/Facility Information' section of the Referral Details screen. The 'Network' field is highlighted with a red box and contains 'CC Network 2'. Other fields include 'Treating Specialty' (Dermatology), 'Appointment Date' (06/05/2016), 'Community Provider / Facility' (Aberdeen VA Clinic), and 'Provider Name' (Christopher Miller). The 'Update' button at the bottom right is also highlighted with a red box.

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

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

The screenshot shows the 'Community Provider/Facility Information' section of the Referral Details screen. The 'Community Provider / Facility' field is highlighted with a red box and contains 'Aberdeen VA Clinic'. Other fields include 'Network' (CC Network 2), 'Treating Specialty' (Dermatology), 'Appointment Date' (06/05/2016), and 'Provider Name' (Christopher Miller). The 'Update' button at the bottom right is also highlighted with a red box.

21. Accept a Referral

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

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



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

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

Figure 72: Referral Details Screen – Accepted Status

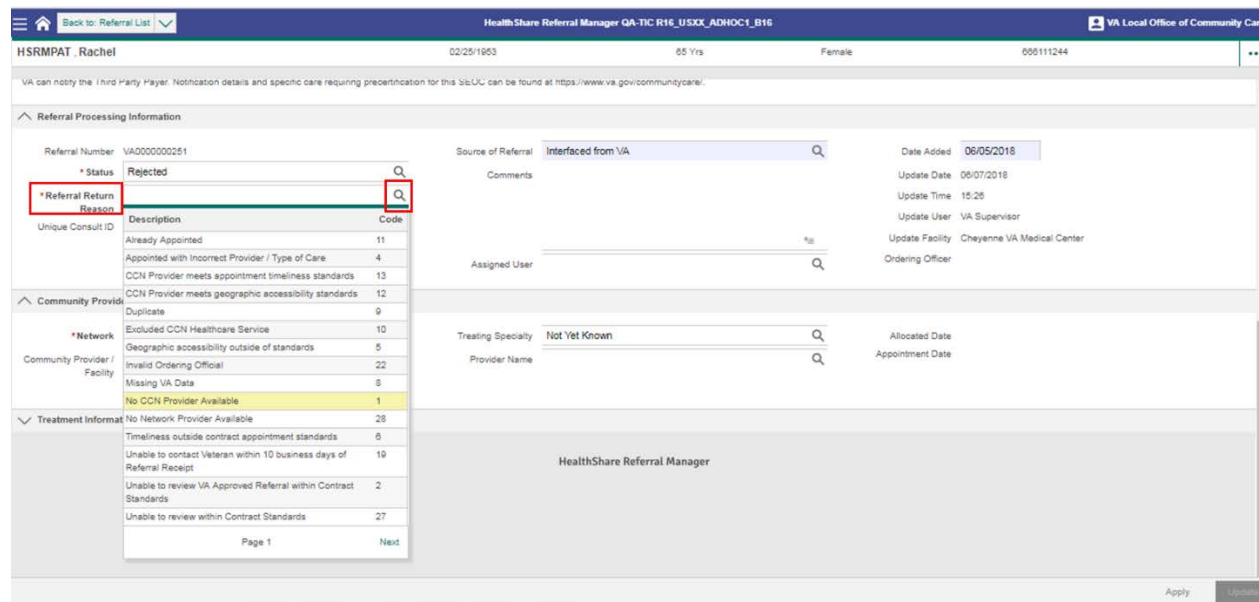
The screenshot displays the 'Referral Details Screen' for a referral in 'Accepted' status. The interface includes a header with navigation options and patient information. The main section is titled 'Referral Processing Information' and contains several fields: 'Referral Number' (VA0000000003), 'Status' (Accepted, highlighted with a red box), 'Referral Return Reason' (empty), 'Unique Consult ID' (325_1603), 'Source of Referral' (Interfaced from VA), 'Date Added' (05/31/2018), 'Update Date' (06/05/2018), 'Update Time' (15:51), 'Update User' (VA Local Office of Community Care), 'Update Facility' (Cheyenne VA Medical Center), and 'Assigned User' (empty). A 'Comments' field is also present. Below this section is 'Community Provider/Facility Information' and 'Treatment Information' with a 'Treatment Notes' field. At the bottom right, there are 'Apply' and 'Update' buttons, with the 'Update' button highlighted in red.

21.1. Reject a Referral

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

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

Figure 73: Referral Details Screen – Referral Return Reason

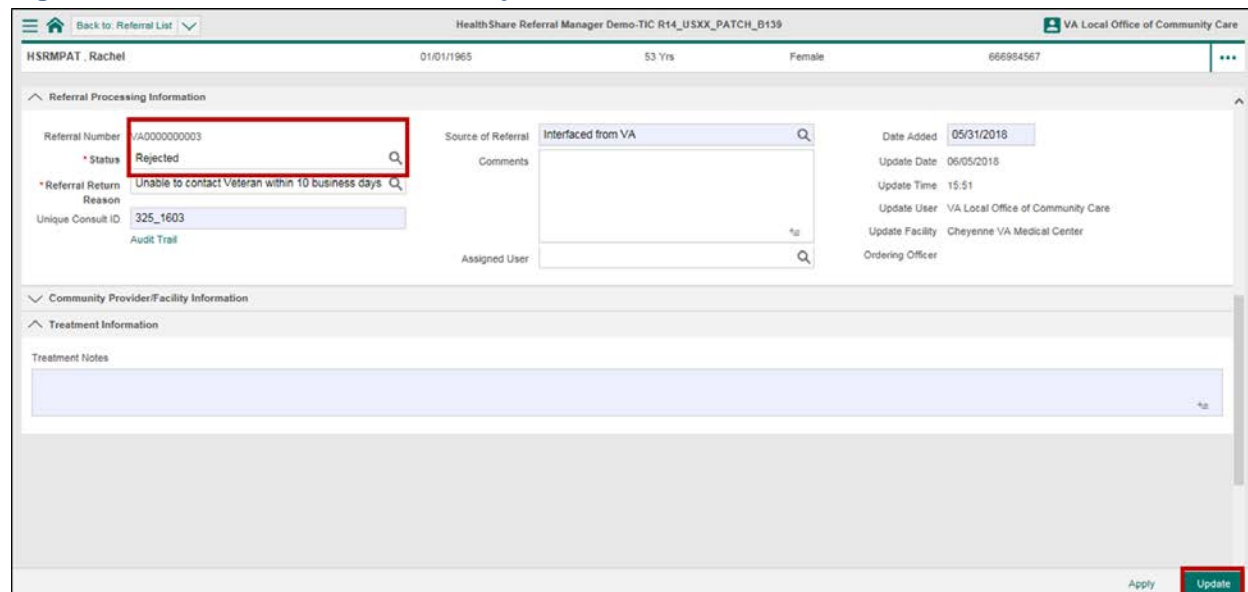


4. Click the **Update** button at the bottom right of the screen to save changes.



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

Figure 74: Referral Details Screen – Rejected Status



22. Manage Appointments

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



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

22.1. Record an Appointment

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

Figure 75: Referral List – Appointment Edits

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
	Cheyenne VA Medical Center	HSRMPAT	Kristen	02/04/1974	666098776	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY GATH	First Appointment Made	Not Allocated		06/05/2018	2
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			7
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			7

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



Notes:

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

Figure 76: Record Appointment Screen – Update

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139 VA Local Office of Community Care

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

Record Appointment

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

*Appointment for Functional capacity or Driver evaluations

Scheduling Method Scheduled by VA

Community Provider/Facility Aberdeen VA Clinic

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

Provider Name Richard Neil

Provider Search

*Treating Specialty General Practice

Appointment Duration 1 hour

Appointment Reason

Reason for Selecting Provider

Notes

HealthShare Referral Manager Update



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

22.1.1. Add a Community Provider to an Appointment

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

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

Figure 77: Record Appointment Screen – Provider Search

HealthShare Referral Manager QA-TIC R14_USXX_ADHOC1_B8 VA Local Office of Community Care

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

Record Appointment

*Service Requested Ophthalmology SEOC 1.0.2

*Appointment for Anesthesia consultation related to the procedure

Scheduling Method Scheduled by Contractor

Community Provider/Facility St. Mary's Hospital

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

Provider Name DAVID RIGO

Provider Search

*Treating Specialty Addiction Medicine

Appointment Duration

Appointment Reason

Reason for Selecting Provider

Notes

HealthShare Referral Manager Update

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

Figure 78: Provider Search Screen – Specialty and Last Name

HealthShare Referral Manager QA-TIC R14_USXX_ADHOC1_B8 VA Local Office of Community Care

Provider Search

* Specialty:

Care Provider Code:

Facility:

First Name:

State:

Last Name:

City:

Affiliation:

Facility	Care Site	Care Provider	Address	City	State	ZIP Code	Telephone	Email
BIDCM Biologic Therapy (IA,DoD)	BIDCM Biologic Therapy	ROBERT TAYLOR (IA,DoD)	:375 Longwood Ave MASCO 413	BOSTON	Massachusetts	02115	937-555-1212	longwood@bidcm.com

HealthShare Referral Manager

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

Figure 79: Record Appointment Screen

HealthShare Referral Manager QA-TIC R14_USXX_ADHOC1_B8 VA Local Office of Community Care

HSRMPAT , Lauren 11/25/1921 96 Yrs Female 866211292

Record Appointment

* Service Requested:

* Appointment for:

Scheduling Method:

Community Provider/Facility:

* Date: * Time:

Provider Name:

Provider Search:

* Treating Specialty:

Appointment Duration:

Appointment Reason:

Reason for Selecting Provider:

Notes:

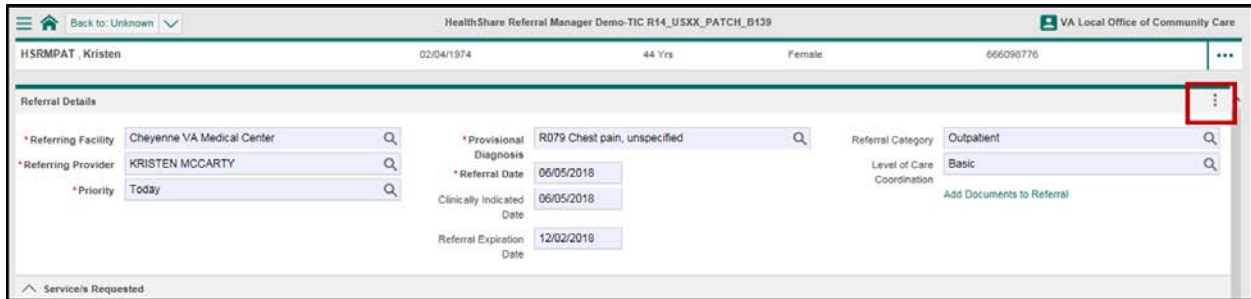
HealthShare Referral Manager

22.2. Record an Appointment from the Component Menu Icon

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

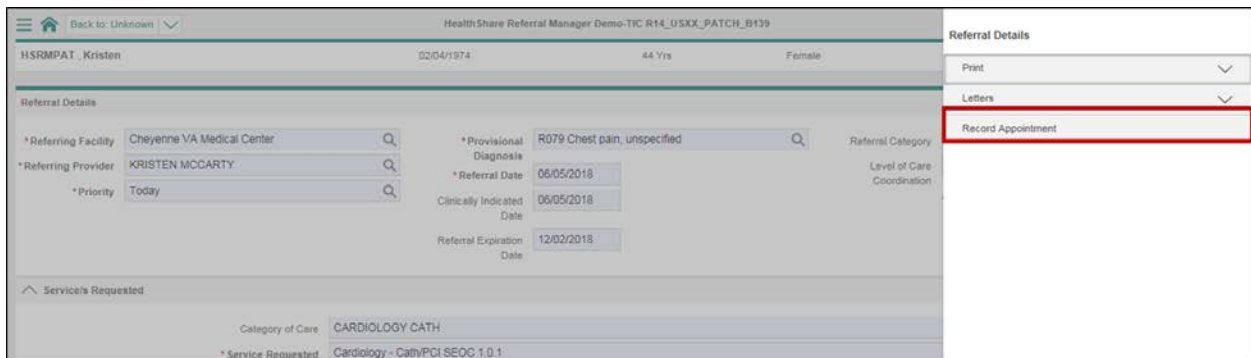
- Click the **Component Menu** icon in the top right of the **Referral Details** screen to access the **Component Menu** drop-down list.

Figure 80: Referral Details Screen – Component Icon



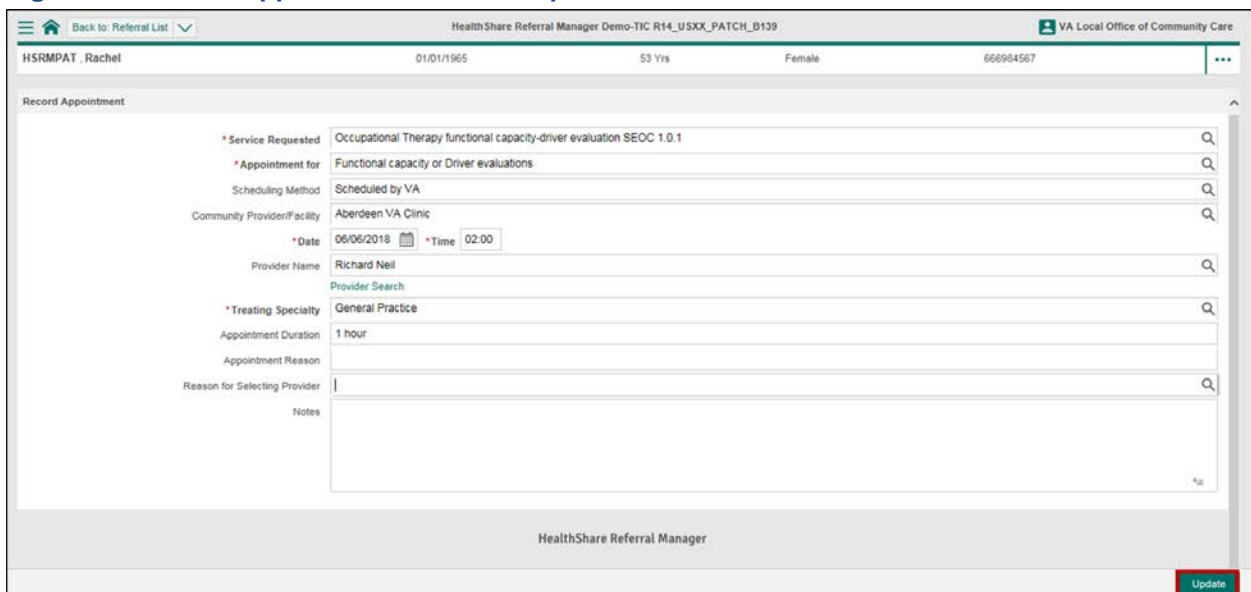
- Select **Record Appointment** from the drop-down menu. The **Record Appointment** screen appears.

Figure 81: Referral Details Screen – Record Appointment



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

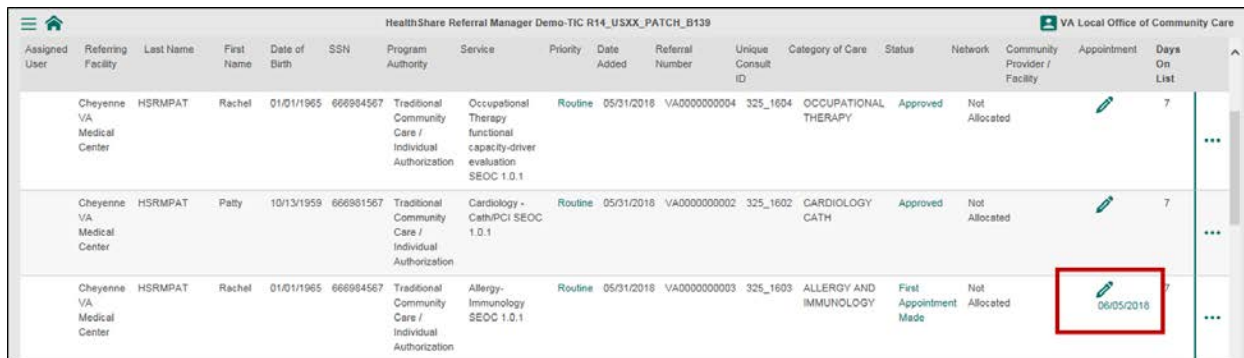
Figure 82: Record Appointment Screen – Update



22.3. Cancel an Appointment

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

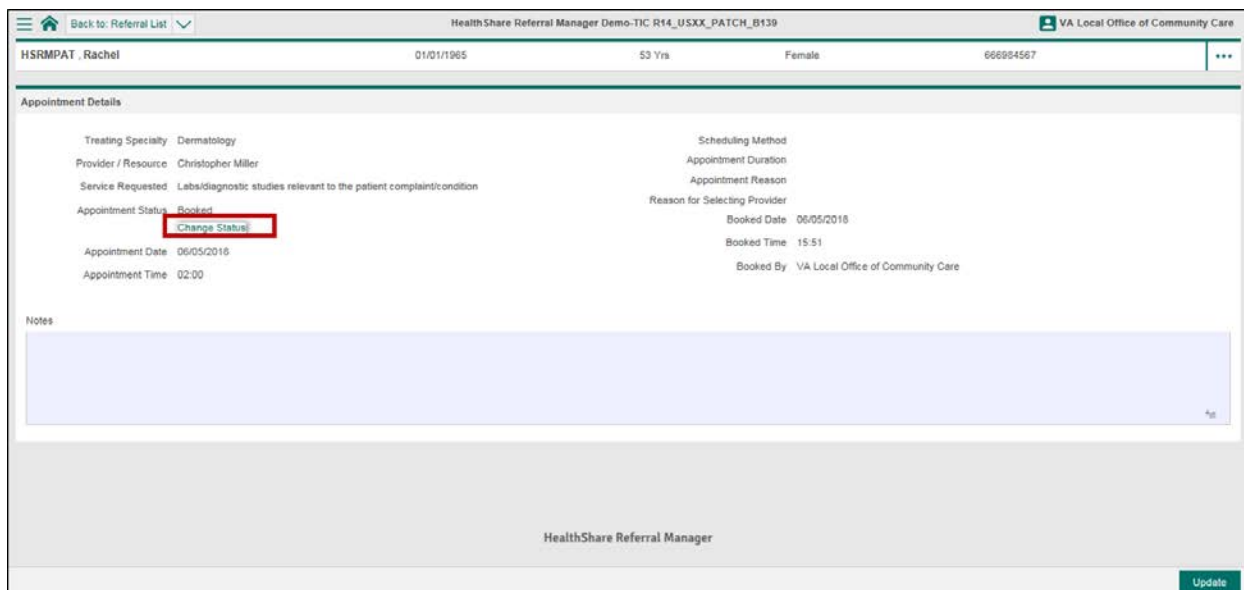
Figure 83: Record Appointment Screen – Date



Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			7
	Cheyenne VA Medical Center	HSRMPAT	Patty	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated			7
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy- Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	First Appointment Made	Not Allocated		06/05/2018	7

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

Figure 84: Record Appointment Screen – Change Status



Back to: Referral List

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139 VA Local Office of Community Care

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

Appointment Details

Treating Specialty	Dermatology	Scheduling Method	
Provider / Resource	Christopher Miller	Appointment Duration	
Service Requested	Labs/diagnostic studies relevant to the patient complaint/condition	Appointment Reason	
Appointment Status	Booked	Reason for Selecting Provider	
	Change Status	Booked Date	06/05/2018
Appointment Date	06/05/2018	Booked Time	15:51
Appointment Time	02:00	Booked By	VA Local Office of Community Care

Notes

HealthShare Referral Manager

Update

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

Figure 85: Record Appointment Screen – Update

23. Indicate Initial Care Given

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

1. [Locate the referral.](#)

Figure 86: Referral List Screen – Referral Information

Assigned User	Referring Facility	Last Name	First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List	
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			7	
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			7	
	Cheyenne VA Medical Center	HSRMPAT	Patty	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	GARDIOLOGY CATH	Approved	Not Allocated			7	
	Cheyenne VA Medical Center	HSRMPAT	Rachel	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Allergy-Immunology SEOC 1.0.1	Routine	05/31/2018	VA0000000003	325_1603	ALLERGY AND IMMUNOLOGY	Initial Care Given	Not Allocated	Aberdeen VA Clinic		06/05/2018	7

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

Figure 87: Referral Details Screen – Change Status

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139 VA Local Office of Community Care

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

Program Authority: Traditional Community Care / Individual Authorizati Estimated Cost of Care: 0.00

Insurance Details: Payer: VA Payer Status: [Search]

Referral Processing Information: Referral Number: VA000000003 Source of Referral: Interfaced from VA Date Added: 05/31/2018
* Status: Initial Care Given Comments: [Text Area] Update Date: 06/06/2018
Referral Return Reason: [Search] Update Time: 08:49
Unique Consult ID: [Search] Update User: VA Local Office of Community Care
Assigned User: [Search] Update Facility: Cheyenne VA Medical Center
Ordering Officer: [Search]

Community Provider/Facility Information: * Network: [Search] Treating Specialty: Dermatology Allocated Date: 06/06/2016
Community Provider / Facility: Aberdeen VA Clinic Provider Name: Christopher Miller Appointment Date: 06/05/2018

Treatment Information: [Text Area]

Apply Update

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

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

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139 VA Local Office of Community Care

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

Authority: * Program Authority: Traditional Community Care / Individual Authorizati Estimated Cost of Care: 0.00

Insurance Details: Payer: VA Payer Status: [Search]

Referral Processing Information: Referral Number: VA000000003 Source of Referral: Interfaced from VA Date Added: 05/31/2018
* Status: Initial Care Given Comments: [Text Area] Update Date: 06/05/2018
Referral Return Reason: 325_1603 Update Time: 15:51
Unique Consult ID: [Search] Update User: VA Local Office of Community Care
Assigned User: [Search] Update Facility: Cheyenne VA Medical Center
Ordering Officer: [Search]

Community Provider/Facility Information: * Network: Not Allocated Treating Specialty: Dermatology Allocated Date: [Search]
Community Provider / Facility: [Search] Provider Name: Christopher Miller Appointment Date: 06/05/2018

Treatment Information: [Text Area]

Apply Update

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

Figure 89: Referral Details Screen – Treatment Information

Treatment Information

Treatment Notes

Apply Update

24. Close a Referral

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

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

Figure 90: Referral Processing Information – Closed Status

Referral Processing Information

Referral Number: VA0000000003

* Status: Closed

Referral Return Reason

Unique Consult ID: 325_1603

Audit Trail

Source of Referral: Interfaced from VA

Comments

Assigned User

Date Added: 05/31/2018

Update Date: 06/06/2018

Update Time: 08:49

Update User: VA Local Office of Community Care

Update Facility: Cheyenne VA Medical Center

Ordering Officer

Community Provider/Facility Information

* Network: Not Allocated

Community Provider / Facility: Aberdeen VA Clinic

Treating Specialty: Dermatology

Provider Name: Christopher Miller

Allocated Date: 06/06/2018

Appointment Date: 06/05/2018

Apply Update

25. Access an Audit Trail

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

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

Figure 91: Referral Processing Information Section – Audit Trail

The screenshot displays the 'Referral Processing Information' section of the HealthShare Referral Manager. The patient information at the top includes HSRMPAT, Rachel, DOB 01/01/1965, 53 Yrs, Female, and ID 666984567. The 'Referral Processing Information' section contains the following details:

- Referral Number: VA000000003
- Source of Referral: Interfaced from VA
- Date Added: 05/31/2018
- * Status: Closed
- Referral Return Reason: (empty)
- Comments: (empty)
- Update Date: 06/06/2018
- Update Time: 08:49
- Update User: VA Local Office of Community Care
- Update Facility: Cheyenne VA Medical Center
- Ordering Officer: (empty)
- Assigned User: (empty)

The 'Unique Consult ID' field is 325_1603, and a red rectangular box highlights the 'Audit Trail' link below it. The 'Community Provider/Facility Information' section at the bottom shows Network: Not Allocated, Treating Specialty: Dermatology, Allocated Date: 06/06/2016, Community Provider: Aberdeen VA Clinic, Provider Name: Christopher Miller, and Appointment Date: 06/05/2016. 'Apply' and 'Update' buttons are at the bottom right.

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



Notes:

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

Figure 92: Data Audit Trail Screen – Referral Update

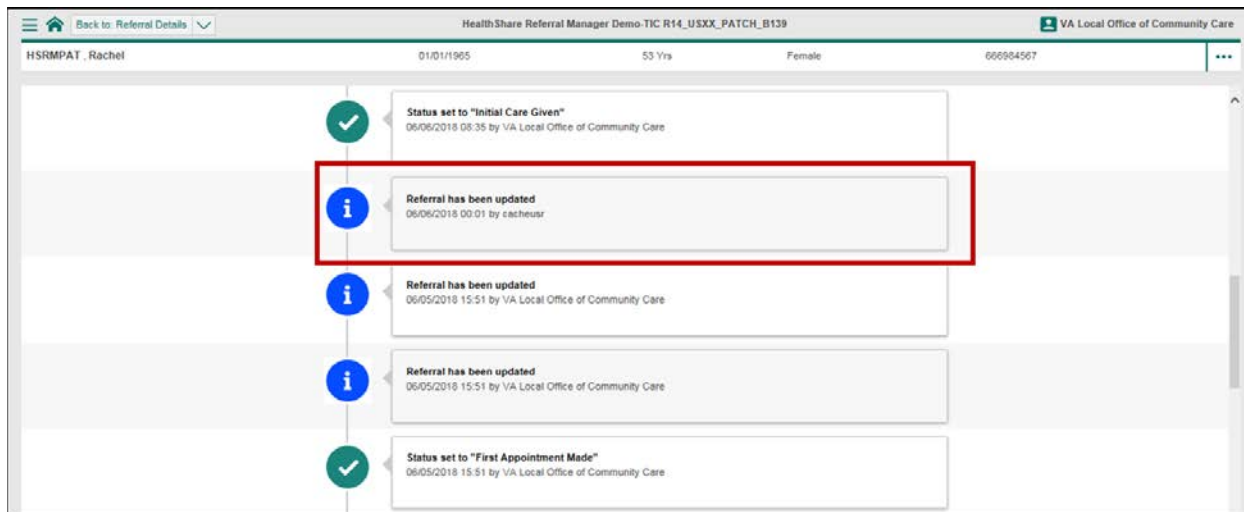


Figure 93: Data Audit Trail Fields Screen

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

26. Reports

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



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

26.1. Run a Report

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

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

Figure 94: Referral List – Reports: Referral Wait Times

First Name	Date of Birth	SSN	Program Authority	Service	Priority	Date Added	Referral Number	Unique Consult ID	Category of Care	Status	Network	Community Provider / Facility	Appointment	Days On List
Wesley	02/04/1974	666096776	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Today	06/05/2018	VA0000000072	325_1672	CARDIOLOGY CATH	First Appointment Mode	Not Allocated		06/05/2018	2
Michael	01/01/1965	666984567	Tribal Health Services	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000005	325_1605	OCCUPATIONAL THERAPY	Approved	Not Allocated			7
Michael	01/01/1965	666984567	Traditional Community Care / Individual Authorization	Occupational Therapy functional capacity-driver evaluation SEOC 1.0.1	Routine	05/31/2018	VA0000000004	325_1604	OCCUPATIONAL THERAPY	Approved	Not Allocated			7
Wesley	10/13/1959	666981567	Traditional Community Care / Individual Authorization	Cardiology - Cath/PCI SEOC 1.0.1	Routine	05/31/2018	VA0000000002	325_1602	CARDIOLOGY CATH	Approved	Not Allocated			7

3. Select the criteria to be used to run the report from the fields available.
4. Click the **Print Preview** icon to run the report.

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

Report Parameters

Referred to Hospital:

Referral Status: Accepted X Approved X

Specialty: Addiction Medicine X

Consultant: Christopher Miller X

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

Figure 96: Wait List Times Report

USXX - Wait List Times

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

Hospital: Hospital of the University of Pennsylvania
 Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

Procedure	Referral Status	0-1 Weeks	1-2 Weeks	2-3 Weeks	3-4 Weeks	4-5 Weeks	5-6 Weeks	6-7 Weeks	7-8 Weeks	8-9 Weeks	9-10 Weeks	10-11 Weeks	11-12 Weeks	12+ Weeks	Total
Occupational Therapy functional capacity-driver evaluation SEO Accepted C101		1	0	0	0	0	0	0	0	0	0	0	0	0	1

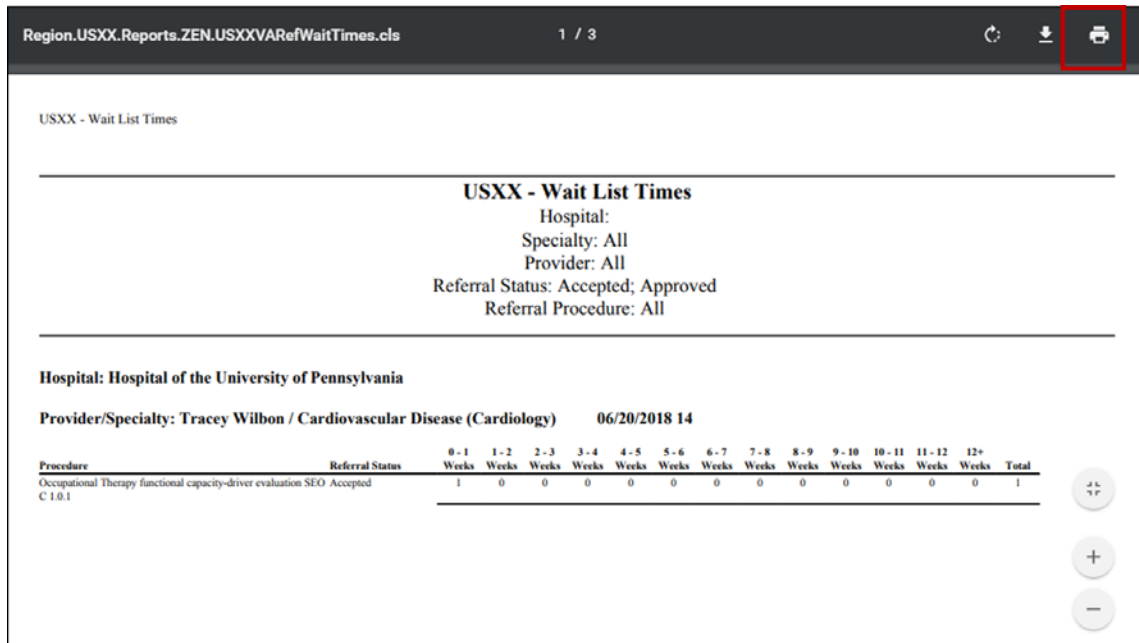
26.2. Print a Report

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

26.2.1. Print a Report in Chrome

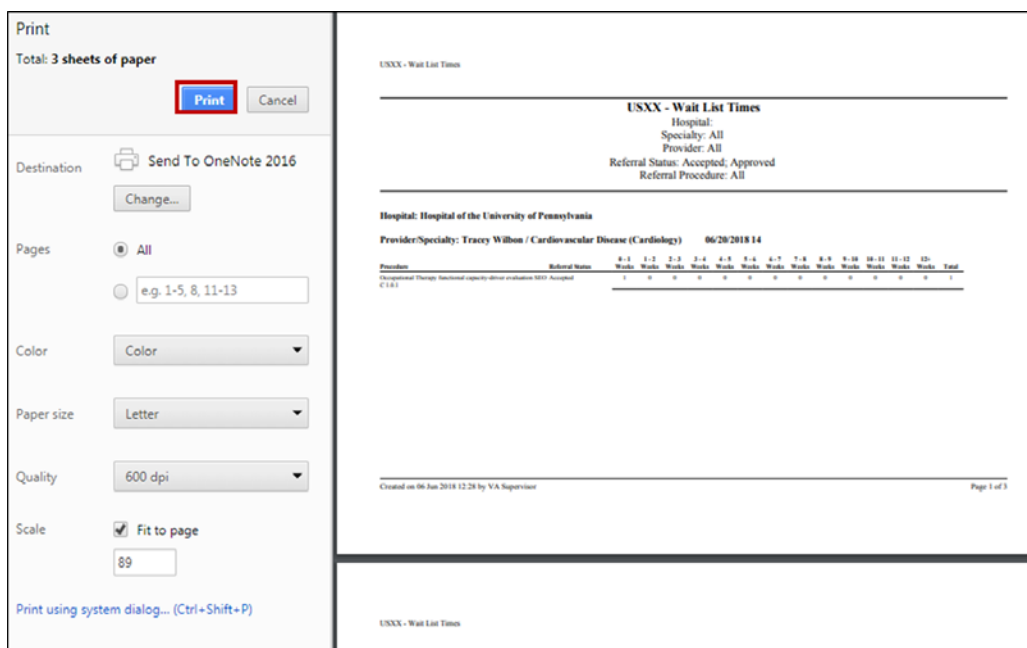
1. [Run any report.](#)
2. Click the **Print** icon in the top right of the report. The **Print** screen appears.

Figure 97: Report in Chrome – Print Icon



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

Figure 98: Print Screen in Chrome – Print Button



26.2.2. Print a Report in Explorer

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

Figure 99: Report in Explorer – Print Icon

USXX - Wait List Times

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

Hospital: Hospital of the University of Pennsylvania
 Provider/Specialty: Tracey Wilbon / Cardiovascular Disease (Cardiology) 06/20/2018 14

Procedure	Referral Status	0-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	10-11	11-12	12+	Total
		Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	Weeks	
Occupational Therapy functional capacity-drive evaluation SEO Accepted C101		1	0	0	0	0	0	0	0	0	0	0	0	0	1

Created on 06 Jun 2018 12:21 by VA Supervisor Page 1 of 3

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

Figure 100: Print Screen in Explorer – Print Button

Print

Printer: Send To OneNote 2016 Properties Advanced Help

Copies: 1 Print in grayscale (black and white)
 Save ink/toner

Pages to Print
 All
 Current page
 Pages 1 - 3
 More Options

Page Sizing & Handling
 Size Poster Multiple Booklet
 Fit
 Actual size
 Shrink oversized pages
 Custom Scale: 100 %
 Choose paper source by PDF page size

Orientation:
 Auto portrait/landscape
 Portrait
 Landscape

Comments & Forms
 Document and Markups
 Scale: 89%

11 x 8.5 Inches

Page 1 of 3

Print Cancel

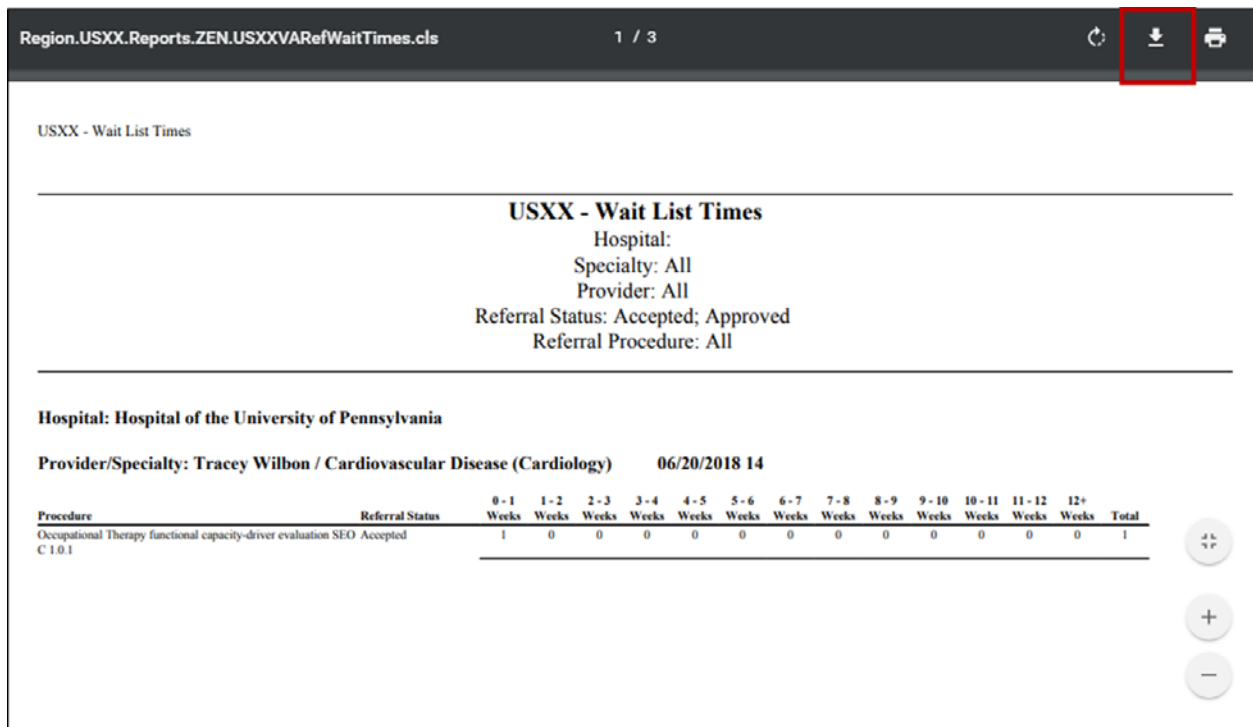
26.3. Download a Report

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

26.3.1. Download a Report in Chrome

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

Figure 101: Report in Chrome – Download Icon



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

USXX - Wait List Times

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

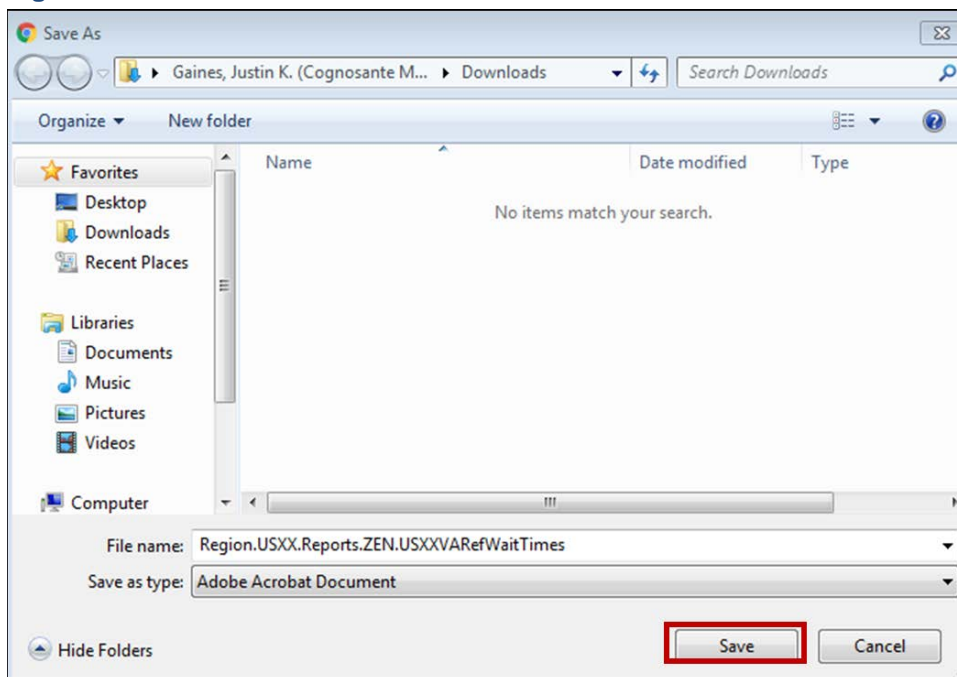
Hospital: Hospital of the University of Pennsylvania

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

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

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

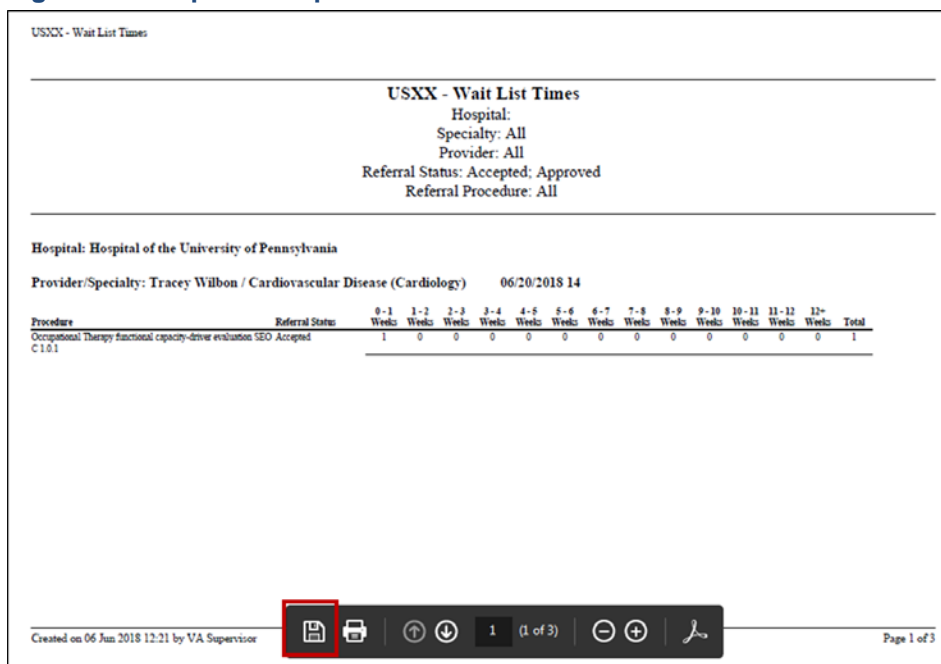
Figure 102: Save As Window in Chrome – Save Button



26.3.2. Download a Report in Explorer

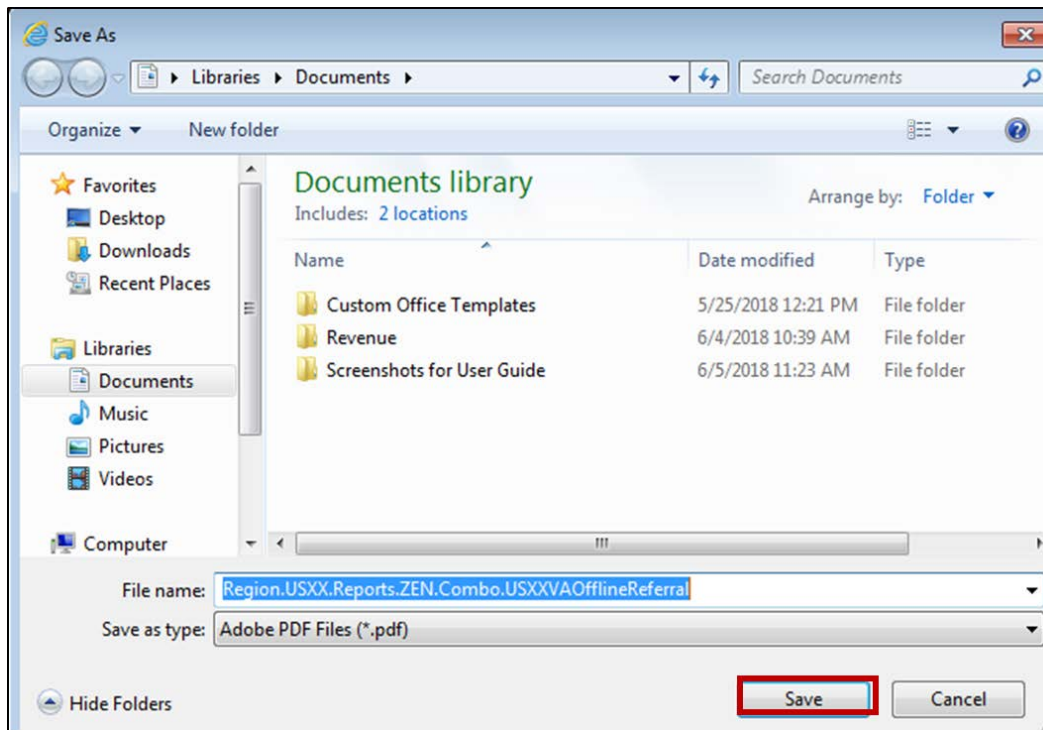
1. [Run any report.](#)
2. Click the **Save As** icon on the bottom of the report. The **Save As** window appears.

Figure 103: Report in Explorer – Save As Icon



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

Figure 104: Save As Window in Explorer – Save Button



27. User Provisioning

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

27.1. Access User Setup Tools

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

Figure 105: Menu List – User Setup

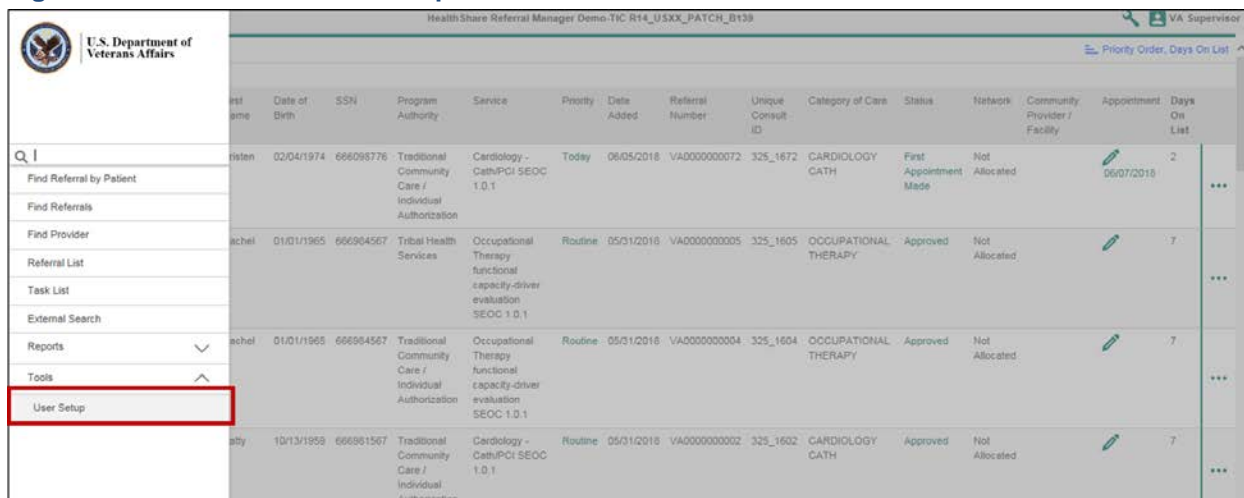
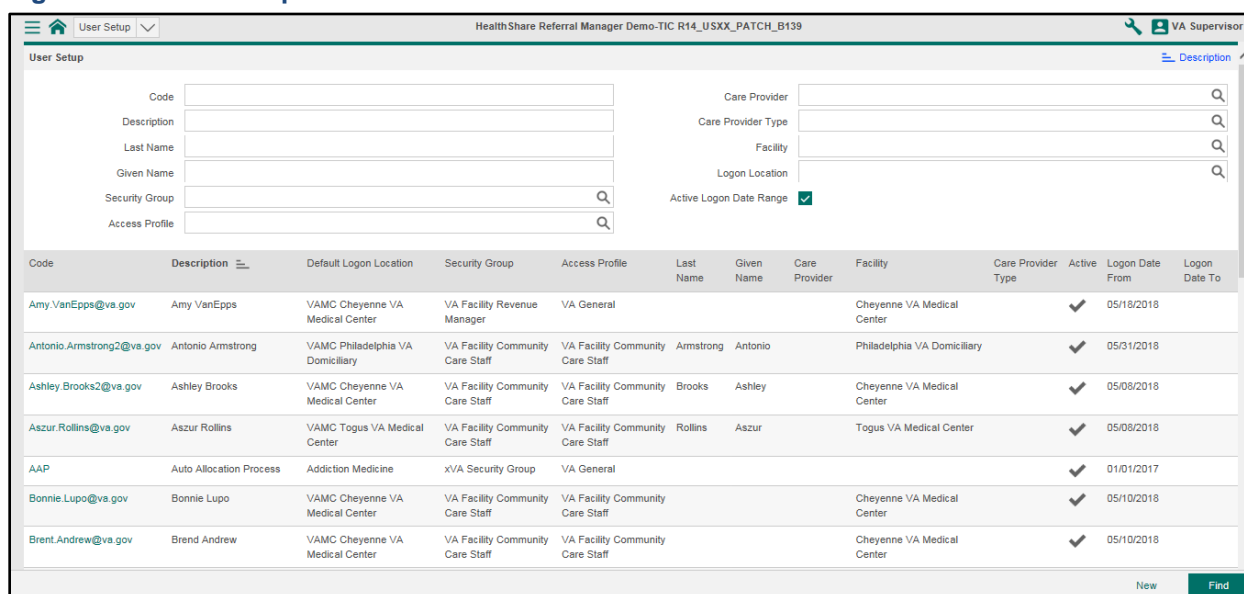


Figure 106: User Setup Screen



27.2. Search for Users

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

Figure 107: User Setup Screen – Code and Description

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139

User Setup

Code: Description:

Last Name: Given Name:

Security Group: Access Profile:

Care Provider: Care Provider Type: Facility: Logon Location:

Active Logon Date Range:

Code	Description	Default Logon Location	Security Group	Access Profile	Last Name	Given Name	Care Provider	Facility	Care Provider Type	Active	Logon Date From	Logon Date To
ccp	Community Clinician	VAMC Cheyenne VA Medical Center	xCommunity Clinical	Community Clinical				Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	01/02/2017	

HealthShare Referral Manager

New

5. Results appear in the table list.

Figure 108: User Setup Screen – Results List

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139

User Setup

Code: Description:

Last Name: Given Name:

Security Group: Access Profile:

Care Provider: Care Provider Type: Facility: Logon Location:

Active Logon Date Range:

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

HealthShare Referral Manager

New

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

Figure 109: User Setup Screen – Logon Details

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139

VA Supervisor

User Setup Details

Logon Details

*Code: ccp

*Description: Community Clinician

*Password: [Redacted]

*Confirm Password: [Redacted]

*Security Group: xCommunity Clinical

*Access Profile: Community Clinical

*Logon Date From: 01/02/2017

Logon Date To: [Calendar Icon]

Force Change of Password at Next Logon:

Logon Facility: Cheyenne VA Medical Center

*Logon Location: VAMC Cheyenne VA Medical Center

Allow Change of Location at Logon:

Other Logon Locations: [Search Icon]

User Type: [Search Icon]

User Details

Created By	Demo User
Created Date and Time	12/11/2017 14:49
Last Updated By	VA Supervisor Cheyenne VA Medical Center
Updated Date and Time	05/14/2018 08:45

HealthShare Referral Manager

Apply Update

27.3. Add Users

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

Figure 110: User Setup Screen – New Button

HealthShare Referral Manager Demo-TIC R14_USXX_PATCH_B139

VA Supervisor

User Setup

Code: ccp

Description: community clinician

Last Name: [Empty]

Given Name: [Empty]

Security Group: [Search Icon]

Access Profile: [Search Icon]

Care Provider: [Search Icon]

Care Provider Type: [Search Icon]

Facility: [Search Icon]

Logon Location: [Search Icon]

Active Logon Date Range:

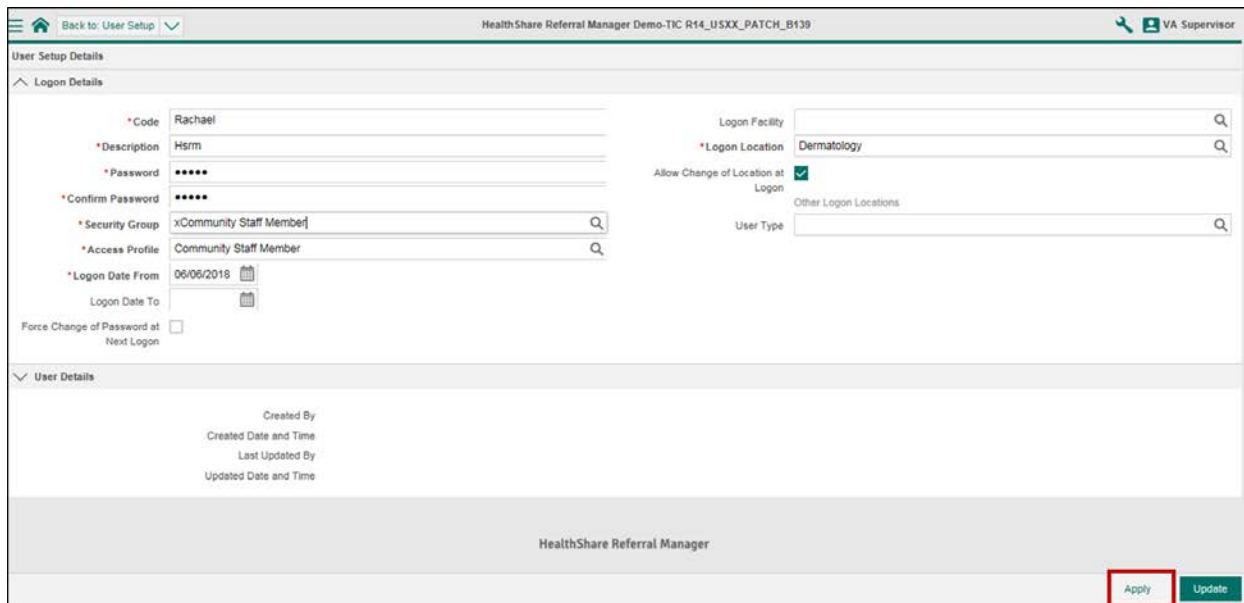
Code	Description	Default Logon Location	Security Group	Access Profile	Last Name	Given Name	Care Provider	Facility	Care Provider Type	Active	Logon Date From	Logon Date To
ccp	Community Clinician	VAMC Cheyenne VA Medical Center	xCommunity Clinical	Community Clinical				Cheyenne VA Medical Center		<input checked="" type="checkbox"/>	01/02/2017	

HealthShare Referral Manager

New Find

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

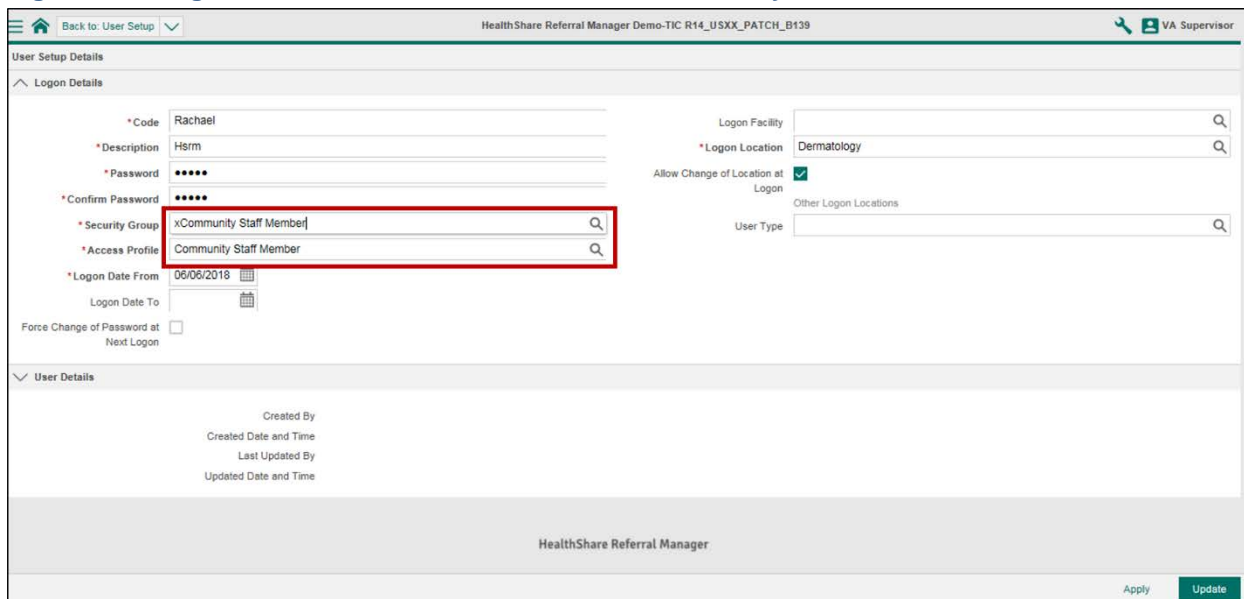
Figure 111: Logon Details Screen – Apply Button



27.4. Manage User Access and Security Profiles

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

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



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

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

HealthShare Referral Manager Demo-TIC R14_U5XX_PATCH_B139

VA Supervisor

User Setup Details

Logon Details

*Code Rachael

*Description Hsm

*Password *****

*Confirm Password *****

*Security Group xCommunity Staff Member

*Access Profile Community Staff Member

*Logon Date From 06/06/2018

Logon Date To

Force Change of Password at Next Logon

Logon Facility

*Logon Location Dermatology

Allow Change of Location at Logon

Other Logon Locations

User Type

Created By

Created Date and Time

Last Updated By

Updated Date and Time

HealthShare Referral Manager

Apply Update

27.5. Add Logon Locations

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

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

HealthShare Referral Manager Demo-TIC R14_U5XX_PATCH_B139

VA Supervisor

User Setup Details

Logon Details

*Code Rachael

*Description Hsm

*Password *****

*Confirm Password *****

*Security Group xCommunity Staff Member

*Access Profile Community Staff Member

*Logon Date From 06/06/2018

Logon Date To

Force Change of Password at Next Logon

Logon Facility

*Logon Location Dermatology

Allow Change of Location at Logon

Other Logon Locations

User Type

Created By

Created Date and Time

Last Updated By

Updated Date and Time

HealthShare Referral Manager

Apply Update

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

Figure 115: Logon Details – Logon Locations

The screenshot displays the 'User Setup Details' page for a user named 'Amy VanEpps'. The 'Logon Details' section is expanded, showing various configuration options. The 'Logon Location' field is highlighted with a red border and contains the text 'VAMC Cheyenne VA Medical Center'. Other fields include 'Code' (Amy.VanEpps@va.gov), 'Description' (Amy VanEpps), 'Password' (masked with dots), 'Security Group' (VA Facility Revenue Manager), 'Access Profile' (VA General), 'Logon Date From' (05/18/2018), and 'Logon Date To' (empty). The 'Allow Change of Location at Logon' checkbox is checked. The 'User Details' section at the bottom shows the user was created by 'VA Supervisor' on '05/18/2018 12:56'.

28. Help Desk Support

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

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

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

Some things to keep in mind

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

Appendix A: Acronyms and Abbreviations

Table 5: Acronyms and Abbreviations

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

Appendix B: Document Type Definitions

Table 6: Document Type Definitions

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