

HealthShare Referral Manager Community Provider User Guide

Department of Veterans Affairs
Office of Information and Technology

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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 community care staff to generate referrals and authorizations for Veterans receiving care in the community. Clinical and VA community care staff located at VA medical centers (VAMCs), outpatient clinics, community-based outpatient clinics (CBOCs), and Veterans Integrated Service Network (VISN) offices use this solution to enhance Veteran access to care. HSRM is an integral component of the community care information technology (IT) architecture that allows Veterans to receive care from community providers.

HSRM allowed VA to transition from what was 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 that:

- 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 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 community care staff, third-party administrators (TPAs), and community providers via a unified platform that enables the secure exchange of medical information.

HSRM allows VA and community providers to better manage community care referrals and authorizations, resulting in simpler processing for VA and community providers as well as enhanced patient experience for Veterans.

1.2. User Guide Overview

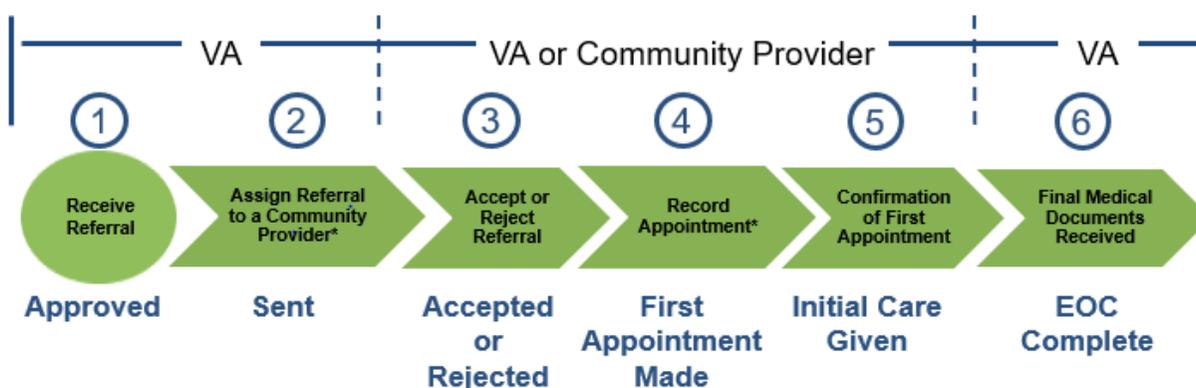
Community providers play a key role in delivering high quality care to Veterans in their communities. HSRM enables community providers to receive and process referrals from VA and share information faster and more accurately than ever before. Community providers, VA, and Veterans all benefit from this new system. This user guide provides details about the community provider's role in processing referrals in HSRM and how to maximize system functionality.

- *Note: HSRM will be down for routine maintenance on the second Tuesday of every month from midnight to 4:00 a.m. During this time, you will be unable to access the system.*

2. HSRM Lifecycle

A referral's lifecycle begins when the referral is received in HSRM, and it ends when the episode of care (EOC) is complete, and all medical documentation has been received. There are six steps in the lifecycle. Community providers complete steps 3, 4, and 5, as shown in the referral lifecycle diagram.

Figure 1: HSRM Referral Lifecycle



**The status of the referral automatically changes in HealthShare Referral Manager once the step is completed.*

Referral lifecycle model in Figure 1 shows the steps occur in the following order, with steps 1 and 2 being done by the VA:

- Step 1 is receiving the referral.
- Step 2 is assigning the referral to a community provider.
- Steps 3-5 are performed by VA or the community provider.
- Step 3 is to accept or reject the referral.
- Step 4 is to record the appointment.
- Step 5 is confirmation of the first appointment.
- Step 6 is performed by VA and completes the episode of care (EOC) by receiving the final medical documents.

3. Accessing HSRM

3.1. Getting Access to HSRM

An HSRM account is needed for staff who typically process referrals, accept and reject referrals, record appointments, and share medical documentation with VA.

In order to be eligible to be an HSRM user, your facility must:

1. Have an active partnering agreement with one or more VAMC.
2. Reach out to the VAMCs you partner with to let them know of your interest in HSRM and determine the best timing for your deployment.

If your facility meets these requirements, you may proceed with HSRM registration.

Follow the steps below to sign up for HSRM.

- *Note: Links to all documents are on the [Office of Community Care Webpage](#).*
 1. Attend a two-hour training webinar on [Veterans Health Administration \(VHA\) Training Finder Real-time Affiliate Integrated Network](#) (TRAIN) or refer to this guide to learn how to use HSRM.
 2. Reference the ID.me User Guide to sign up for an ID.me account at the [ID.me website](#).
 3. One team member from your organization will fill out the End User Tracker with all the names and email addresses of end users requiring access to HSRM. Please ensure the email addresses listed match those used for each respective user's ID.me account.
 4. One team member from your organization will then submit the End User Tracker to the [HSRM Help Desk](#).
 5. The HSRM Help Desk will send that team member the login information for their staff.

4. Working in HSRM

4.1. Locate a Referral

HSRM allows community providers to locate referrals more quickly and manage them according to their priority. When logging in to the system, the **Referral List** screen—which is also the home screen—appears. The **Referral List** screen features what is, in effect, a user to-do list; it shows all of the referrals from VA in a central location and allows referrals to be sorted.

All lists in HSRM can be sorted by column heading. The default view lists referrals by highest priority and date added, making it easy to see which referrals need immediate attention. The **Referral List** may also be sorted by the user.

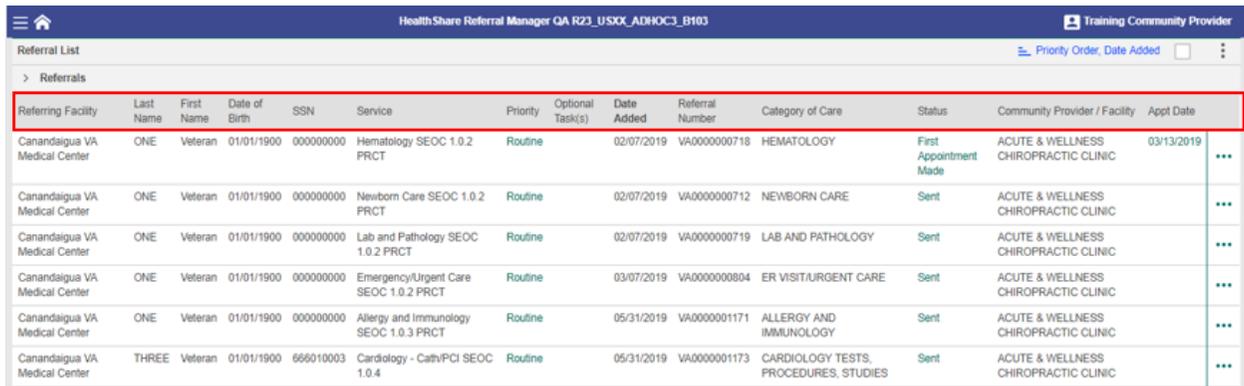
4.1.1. Column Header Sort

Sorting the **Referral List** allows users to view the information in any column in ascending or descending order.

To locate a referral by sorting column headers:

1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers) at the top left of the screen, then selecting **Referral List** on the menu.
2. Select on a column heading to sort data in ascending order by that category. Select it a second time to sort in descending order. Select it a third time to sort by the default, **Priority Order** and **Date Added**.
3. Select on the row of the relevant referral to access the **Referral Details** screen.

Figure 2: Referral List



The screenshot shows the 'Referral List' interface in the HealthShare Referral Manager. The table lists referrals with columns for Referring Facility, Last Name, First Name, Date of Birth, SSN, Service, Priority, Optional Task(s), Date Added, Referral Number, Category of Care, Status, Community Provider / Facility, and Appt Date. A blue hyperlink 'Priority Order, Date Added' is visible in the top right corner of the table area.

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - Cath/PCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

4.1.2. Advanced Sort

The **Advanced Sort** feature provides multiple criteria by which users can sort any **Referral List** in HSRM.

To locate a referral by using the **Advanced Sort** feature:

1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers), then select the **Referral List** on the menu by using the up and down arrows or selecting on it.
2. Select the blue hyperlink on the **Referral List** to display the **Advanced Sort** (screen readers will select the link referral list sorted by **Priority Order**, ascending **Date Added** secondary sort then press enter to activate the **Advanced Sort** option).

Figure 3: Referral List – Advanced Sort

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - Cath/PCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

- The available options appear. Both primary and secondary sort criteria can be selected. Select Ascending (referred to as the Ascending icon for screen readers) or Descending (referred to as the Descending icon for screen readers) associated with the specific criterion for the sort located on the right of the Referral List. In the case shown below, Last Name and Date of Birth have been selected in ascending order. The referrals are now sorted according to the sort criteria. Select on the row of the relevant referral to view the Referral Details screen.

Figure 4: Sorting Options

4.2. Manually Change the Status of a Referral

The **Referral Status** shows where a referral is in its lifecycle. As shown in Figure 1, the possible statuses are: **Approved, Sent, Accepted, Rejected, First Appointment Made, Initial Care Given, and EOC Complete**. Community providers should only use **Accepted, Rejected, First Appointment Made, and Initial Care Given**.

To manually update the status of a referral:

1. Locate the referral (see the Locate a Referral section of this guide).
 2. Navigate to the **Referral Details** screen by selecting on the referral row.
 3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen. Select the **Status** field and select the new status. Community providers can change the referral status to **Accepted**, **Rejected**, **First Appointment Made** (status automatically changes to **First Appointment Made** when an initial appointment is recorded), or **Initial Care Given**, depending on where the referral is in its lifecycle.
- *Note: If the **Rejected** status is selected, the **Referral Return Reason** field will be mandatory.*

Figure 5: Referral Details – Status Field

THREE, Veteran 01/01/1900 120 Yrs Male 000 MAPLE LANE WASHINGTON, DC 20420

Service's Requested

Authority

Insurance Details

VA Payer Status VA - Primary Payer

Referral Processing Information

Referral Number VA000000779

* Status Sent

Referral Return Reason Accepted

Unique Consult ID A

* Network Rejected

Source of Referral Interfaced from VA

Comments

Date Added 03/01/2019

Update Date 03/05/2019

Update Time 11:30

Update User Training FCC

Update Facility Canandaigua VA Medical Center

Ordering Officer Training FCC

Assigned Workgroup

Page 1

Initial Community Provider

Treatment Information

HealthShare Referral Manager

Apply Update

4. Enter any relevant comments regarding the referral in the **Comments** field of the **Referral Processing Information** section.
5. Select the **Update** button to save changes and return to the previous screen. Select the **Apply** button to save changes and stay on the same screen.

4.3. Access Standardized Episode of Care Information

A Standardized Episode of Care (SEOC) is a bundle of services that has been authorized under a single referral. All clinically related services for one patient for a discrete diagnostic condition within a specific period across a continuum of care are included in a SEOC. A SEOC helps reduce the need to seek individual authorization for each element of care. It includes all physician, inpatient, and outpatient care as well as labs and diagnostics. Within HSRM, the user can view a list of services associated with the SEOC. This is the procedural overview of services.

To view SEOC details:

1. Locate the referral (see the Locate a Referral section of this guide).

2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Navigate to the **Service Requested** section on the **Referral Details** screen and select the **SEOC Details** link.
 - *Note: VA is required by law to obtain precertification and bill third-party payers for care that is not related to a Veteran's service or special authority for Veterans who have other health insurance (OHI). Precertification information and instructions can be found under the **SEOC Details** link and in the **Offline Referral Form**.*

Figure 6: Referral Details – SEOC Details

The screenshot shows the 'Referral Details' screen for a Veteran. The patient information includes: COMBAT, Veteran, G; 01/01/1935; 85 Yrs; Male. The 'Referral Details' section includes: Referring Facility (Togus VA Medical Center), Referring Facility Phone (207-623-8411), Referring Facility Fax (207-623-5792), Referring Provider (CASSIE HECK, NPI: 534_520824755), Priority (Routine), Provisional Diagnosis (R071 Chest pain on breathing), Referral Date (05/22/2020), Clinically Indicated Date (05/22/2020), and Referral Expiration Date (02/16/2021). The 'Service/s Requested' section is expanded to show 'Cardiology - Cath/PCI SEOC 1.0.5' with a 'SEOC Details' link highlighted in a red box. Below this, there is a note: 'This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above. For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen. If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.'

4. Review the **Procedural Overview** for the SEOC.

Figure 7: SEOC Details Screen

The screenshot shows the 'SEOC Details' screen for 'Allergy and Immunology SEOC 1.0.3 PRCT'. The patient information includes: ONE, Veteran; 01/01/1900; 119 Yrs; Male; 515 Alpha St DAYTON, OH 45404. The 'Procedural Overview' section shows a table of SEOC services and their quantity limits:

SEOC Service	Quantity Limit
Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Labs (including RAST testing) and pathology relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Diagnostic imaging relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Procedures/diagnostic studies relevant to the referred condition including but not limited to: allergen skin testing, drug testing, chemical patch testing, methacholine challenge, PFT-ALLERGY AND IMMUNOLOGY-1.0.3	999
Standard immunotherapy and RUSH immunotherapy, including Nurse Visits-ALLERGY AND IMMUNOLOGY-1.0.3	999
Creation of serum for injections-ALLERGY AND IMMUNOLOGY-1.0.3	999
Infusion therapy, in clinic, to include IV Fluids during infusion as relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Follow up Visits for this Episode of Care Relevant to the Referred Condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Follow Up Biopsy if Clinically Indicated-ALLERGY AND IMMUNOLOGY-1.0.3	999
Desensitization (Antibiotics and Chemotherapeutic Agents)-ALLERGY AND IMMUNOLOGY-1.0.3	999
Inpatient Admission or Observation admission as related to referred condition on the consult -ALLERGY AND IMMUNOLOGY-1.0.3	999

4.4. Print the Offline Referral Form

Printing the **Offline Referral Form** enables community providers to retain a hard copy of the referral for their files. The **Offline Referral Form** contains referral details,

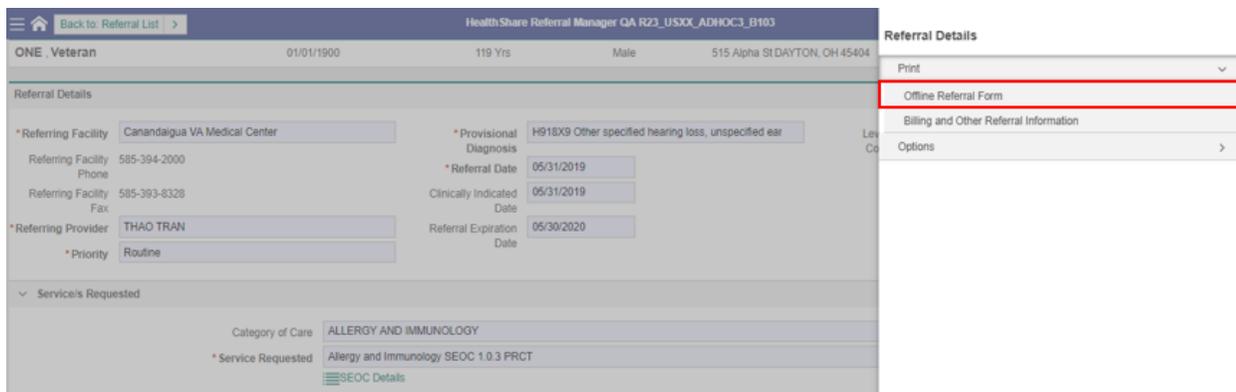
additional referral information, billing and precertification information, patient details, and SEOC information. Community providers can print offline referral forms for individual or multiple referrals.

4.4.1. Individual Referral

To print the **Offline Referral Form** for an individual referral:

1. Locate the referral (see the Locate a Referral selection of this guide).
2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Select the **Component Menu** icon  (also called the referral list component menu button by screen readers) of the **Referral Details** section, then select **Offline Referral Form** from the **Print** drop-down menu.

Figure 8: Component Menu – Offline Referral Form



4. The **Offline Referral Form** appears in a new browser tab and can be printed, downloaded, and saved.

Figure 9: Offline Referral Form

  U.S. Department of Veterans Affairs	VA Form 10-7080 - Approved Referral For Medical Care
Veteran Name: Combat, Veteran G Veteran ICN: 5000002698V481723 Veteran EDIPI: 100894 Veteran Date of Birth: 1935-01-01 Veteran Address:	Referral Number: VA0000000347 Priority: Routine Referral Issue Date: 2020-05-22 Expiration Date: 2021-02-16 First Appointment Date: 2020-08-20
Veteran Phone Number: Veteran Mobile Phone Number (if Known): Veteran Business Phone Number (if Known): Veteran Email Address (if Known):	
Referring VA Facility: Togus VA Medical Center VA Telephone Number: 207-623-8411 VA Fax Number: 207-623-5792	
Initial Community Care Provider/Facility: PINNACLE HEALTH CARDIOVASCULAR INSTITUT Initial Provider Location: PINNACLE HEALTH CARDIOVASCULAR INSTITUT-1000 N FRONT ST, LEMOYNE, PA, 17043-207RC0000X Provider Name (if known): BODIWALA, KUNAL N Community Provider NPI: 1043496789	

- *Note: If you are using Chrome as your browser, you will need to download and save the form to your computer. If you are using Internet Explorer as your browser, use the **Save and Copy** feature to save to your computer.*

4.4.2. Multiple Referrals

To generate an **Offline Referral Form** for multiple referrals:

1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers) then selecting **Referral List** on the menu by using the up and down arrows or selecting on it.
 - *Note: Generating an **Offline Referral Form** for multiple referrals may be done from any referral list, including the Veteran's referral list.*
2. Select the **Toggle Multiple Selections** checkbox to enable the selection of multiple referrals (for screen readers select the toggled multiple selection checkbox not checked; to select press enter), then select the checkboxes next to the appropriate referrals (for screen readers select row button for each preferred referral).

Figure 10: Referral List – Multiple Referrals

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

3. Select the **Component Menu** icon  (also called referral list component menu button by screen readers) and select **Offline Referral Form** from the **Print** drop-down menu.

Figure 11: Component Menu – Selected Offline Referral Forms

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

4. The **Offline Referral Form** appears in a new browser tab.

Figure 12: Multiple Offline Referral Form

Veteran Approved Referrals for Medical Care Cover Page					
Veteran Name	Referral No	Referral Date	VA Facility	Category of Care	Community Provider/Facility
Combat, Veteran	GVA0000000347	2020-05-22	Togus VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	PINNACLE HEALTH CARDIOVASCULAR INSTITUTE
Combat, Veteran	GVA0000000393	2020-08-04	Togus VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	PINNACLE HEALTH CARDIOVASCULAR INSTITUTE
Combat, Veteran	GVA0000000394	2020-08-04	Togus VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	PINNACLE HEALTH CARDIOVASCULAR INSTITUTE
Combat, Veteran	GVA0000000395	2020-08-04	Togus VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	PINNACLE HEALTH CARDIOVASCULAR INSTITUTE

- *Note: Compiled **Offline Referral Forms** contain a cover page. The **Offline Referral Form** can be downloaded and saved.*

4.5. Manage Documents

HSRM allows VA and community providers to easily upload and download medical documents such as medical records and images. Prior to providing care to a Veteran, community providers can download and review documents that VA shares regarding the Veteran/patient. Following care, community providers upload relevant patient care documentation for VA’s review. This eliminates faxing and emailing documentation and greatly enhances the accuracy of patient documentation. HSRM accepts most file types, including JPG, BMP, PNG, Microsoft Office, and PDF. JPG and PDF files display in the preview section. There are no limitations on file size.

4.5.1. View and Download Documents

To view and download documents:

1. Locate the referral (see the Locate a Referral section of this guide).
 2. Navigate to the **Referral Details** screen by selecting on the referral row.
 3. Select **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen. Here all documents that have been added to the referral can be viewed.
- *Note: Documents may also be viewed and downloaded by accessing **Documents** from the **Additional Referral Information** screen. These*

instructions are included in the View Additional Referral Information section of this guide.

4.5.2. Add Documents

To add documents to a referral:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Navigate to the **Referral Details** screen by selecting on the referral row.
3. Select **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen.

Figure 13: Referral Details – Add Documents to a Referral

HealthShare Referral Manager QA R24_USXX_ADHOC1 Training Community Provider

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Referral Details

* Referring Facility Canandaigua VA Medical Center
Referring Facility Phone 585-394-2000
Referring Facility Fax 585-393-8328
* Referring Provider THAO TRAN NPI: 4433224183
* Priority Routine

* Provisional Diagnosis H918X9 Other specified hearing loss, unspecified ear
* Referral Date 05/31/2019
Clinically Indicated Date 05/31/2019
Referral Expiration Date 06/12/2020

Level of Care Coordination Basic
Add/View Documents

4. Select the **New** button  on the **Documents** screen. The **Add Document** screen appears.
5. Enter data in the corresponding fields on the **Add Document** screen.
 - *Note: The **Date Created**, **Time Created**, and **User Created** fields are populated automatically and are read-only.*

Figure 14: Add Documents Screen

HealthShare Referral Manager QA R21_USXX_ADHOC2_B52 Training Community Provider

ONE, Veteran 01/01/1900 119 Yrs Male 000 MAPLE LANE

Add Document

Date Created 03/14/2019
Time Created 20:18
User Created Training Community Provider
*Description CT scan
*Document Type Medical Documents

Attach File 
Upload

HealthShare Referral Manager Update

6. Select the **Upload** button  and select the file from the computer's hard drive.
7. To identify the type of document, select the **Magnifying Glass** icon  (also called document type lookup graphic by screen readers) in the **Document Type** field and choose the appropriate type (either **Medical Documents** or **Request for Services/SAR**). This will trigger an automatic task for VA to review the document.
8. Select the **Update** button  at the bottom right of the screen to save and go back to the **Documents** screen.
9. Select **Referral Details** from the **Breadcrumb Trail** drop-down list to go back to the **Referral Details** screen or continue to add documents in the same manner.

4.6. Record an Appointment

Recording appointments in HSRM makes this information available to VA without having to phone, email, or fax, thus reducing the administrative burden for both VA and community providers. An appointment can be recorded in the system from the **Referral Details** screen.

- *Note: Do not forget to book the appointment in your own external system.*

To record an appointment:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Select the referral to navigate to the **Referral Details** screen.
3. Select the **Component Menu** icon  (also called referral list component menu button by screen readers) located in the **Referral Details** section to open the **Component Menu**.
4. Select **Options** and **Record Appointment**.

Figure 15: Referral Details – Record Appointment



The screenshot shows the 'Referral Details' screen in the HealthShare Referral Manager. The top navigation bar includes a 'Back to Referral List' button and the system name 'HealthShare Referral Manager QA R23_USIX_ADRKOC3_B103'. Below this, patient information is displayed: 'ONE Veteran', '01/01/1900', '119 Yrs', 'Male', and '515 Alpha St DAYTON, OH 45404'. The main section is titled 'Referral Details' and contains several fields: 'Referring Facility' (Canandagua VA Medical Center), 'Provisional Diagnosis' (H918X9 Other specified hearing loss, unspecified ear), 'Referring Facility Phone' (585-394-2000), 'Referral Date' (05/31/2019), 'Referring Facility Fax' (585-393-8328), and 'Clinically Indicated Date' (05/31/2019). On the right side, there is a 'Referral Details' sidebar with a dropdown menu. The menu is open, showing options: 'Print', 'Offline Referral Form', 'Billing and Other Referral Information', 'Options', and 'Record Appointment'. The 'Options' menu item is highlighted with a red box, and 'Record Appointment' is the selected option.

5. Enter the appropriate information (e.g., **Service Requested**, **Appointment for**, **Scheduling Method**, **Date/time**).
- *Note: Mandatory fields are marked with an asterisk (screen readers identify these fields as **Star** and **Required**).*

Figure 16: Record Appointment Screen

Record Appointment

* Service Requested: Allergy and Immunology SEOC 1.0.3 PRCT

* Appointment for: Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY:1.0.3

Scheduling Method: Scheduled by Community Provider

* Date: 08/06/2020 * Time: 14:00 (EST) America/New_York

* Treating Specialty: Physical Therapist
PPMS Provider Search

* Community Provider/Facility: ORTHOPEDIC PHYSICAL THERAPY

* Appointment Location: ORTHOPEDIC PHYSICAL THERAPY-9150 Huebner Rd Ste 115, San Antonio, TX, 78240-225100000X

Provider Name: ALANDRA LANCASTER

Affiliation: TriWest - PC3

Drive Time:

Appointment Type:

Appointment Duration:

Appointment Reason:

Notes:

HealthShare Referral Manager

Update

6. If the name of the specific facility caregiver is unknown or the appointment is with a facility caregiver other than the initial community provider, you may search for a community provider using the **Provider Profile Management System (PPMS) Provider Search**, which allows users to search by a provider's National Provider Identifier (NPI).

4.6.1. Locate a Provider Using the PPMS Provider Search

A list of providers and their details can be found using the **PPMS Provider Search** feature. The **PPMS Provider Search** allows users to search by a provider's NPI.

1. On the **Record Appointment** screen, select the **PPMS Provider Search** link.

Figure 17: Record Appointment Screen – PPMS Provider Search

Record Appointment

* Service Requested: Allergy and Immunology SEOC 1.0.3 PRCT

* Appointment for: Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY:1.0.3

Scheduling Method: Scheduled by Community Provider

* Date: 08/05/2020 * Time: 14:00 (EST) America/New_York

* Treating Specialty: Physical Therapist
PPMS Provider Search

* Community Provider/Facility: ORTHOPEDIC PHYSICAL THERAPY

* Appointment Location: ORTHOPEDIC PHYSICAL THERAPY-9150 Huebner Rd Ste 115, San Antonio, TX, 78240-225100000X

Provider Name: ALANDRA LANCASTER

Affiliation: TriWest - PC3

Drive Time:

Appointment Type:

Appointment Duration:

Appointment Reason:

Notes:

HealthShare Referral Manager

Update

2. Enter the provider's NPI in the **NPI** field.

3. Select the **Find** button to connect directly to **PPMS** to find the provider with the designated NPI.

Figure 18: PPMS Provider Search Screen – NPI Search

The screenshot shows the 'PPMS Provider Search' interface. At the top, there is a navigation bar with a home icon, a 'Back to: Record Appointment' button, the text 'HSRM - UAT - 31.1', and a user profile for 'UAT Training Team - Admin Account'. Below the navigation bar, a header row displays 'HSRMPAT, James', '07/20/1943', '77 Yrs', and 'Male'. The main search area contains the text 'To find a provider, enter a valid NPI' and an input field with the NPI '1346206547'. Below the input field is a table with columns: Specialty, Care Provider, Affiliation, Phone, Care Site, Address, Drive Time, and Distance. At the bottom right of the search area, there is a green 'Find' button.

4. **Select** the appropriate provider.

Figure 19: PPMS Provider Search Screen – NPI Search Results

The screenshot shows the search results for the NPI '1346206547'. The header row at the top displays 'COMBAT, Veteran, G', '01/01/1935', '85 Yrs', and 'Male'. Below the header, the text 'Records found: 1 (1s)' is displayed. A table with the following columns is shown: Specialty, Care Provider, Affiliation, Phone, Care Site, Address, Drive Time, Distance, Provider NPI, and High Performing Provider. The table contains one row of results.

Specialty	Care Provider	Affiliation	Phone	Care Site	Address	Drive Time	Distance	Provider NPI	High Performing Provider
Home Health	A and D Health Care Professionals Inc	TriWest - Choice	9372366750	A and D Health Care Professionals Inc-1601 Needmore Rd Ste 1, Dayton, OH, 45414-251E00000X	1601 Needmore Rd Ste 1, Dayton, OH, 45414			1346206547	Unknown

Figure 20: Record Appointment Screen

- **Note: Affiliation, Appointment Type, Appointment Duration, Appointment Reason, and Notes fields are optional. However, entering information in these fields is a best practice, as it ensures that VA and the community provider have access to all relevant appointment information in a central location.**
5. Select the **Update** button  on the **Record Appointment** screen to save the appointment information. The **Referral Details** screen appears, and the status of the referral will automatically change to **First Appointment Made**.
 - **Note: If an appointment is recorded for a provider other than the initial community provider, that second provider will not see the referral on their referral list but will instead receive a task on his/her facility’s Task List that will allow them to work with the referral.**
 - **Note: The first appointment made in the SEOC will be on the Referral List for the duration of the referral, regardless of subsequent appointments that are scheduled and occur. The date of the first appointment made also displays in the Appointment Date field in the Initial Community Provider/Facility Information section on the Referral Details screen.**

4.7. Cancel or Mark an Appointment as a No-Show

To cancel an appointment:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Select the **Action Menu** icon  (also called link referral list action menu by screen readers) next to the corresponding referral row and select **Additional Referral Information**.
 - **Note: The Action Menu icon  is also available from the Referral Details screen in the Patient Banner.**

Figure 21: Action Menu – Additional Referral Information

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandagua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandagua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandagua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandagua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000604	ER VISIT/URGENT CARE
Canandagua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandagua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

3. Locate the appointment from the **Appointments** section and select the **Status** link. The **Appointment Change Status** screen appears.

Figure 22: Additional Referral Information Screen

Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details
VA0000000395	10/08/2020	14:00	Initial outpatient evaluation and treatment for the referred condition on the consult order- CARDIOLOGY TESTS, PROCEDURES, STUDIES-1.0.6	Internal Medicine - Cardiovascular Disease PINNACLE HEALTH CARDIOVASCULAR INSTITUT-1000 N FRONT ST, LEMOYNE, PA, 17043-207RC0000X
VA0000000347	08/20/2020	14:00	Initial outpatient evaluation and treatment for the referred condition on the consult- CARDIOLOGY TESTS, PROCEDURES, STUDIES-1.0.6	Internal Medicine - Cardiovascular Disease PINNACLE HEALTH CARDIOVASCULAR INSTITUT-1000 N FRONT ST, LEMOYNE, PA, 17043-207RC0000X

- **Note: The Change Status screen can also be accessed by selecting the Appointment For link located on the referral row and then selecting Change Status, located beneath the Appointment Status field.**
4. The **Change Status To** field automatically populates as **Canceled**. If selecting a different status, select the **Magnifying Glass** icon  (also called change status to lookup graphic by screen readers) in the **Change Status To** field and select a status from the drop-down list.
 - **Note: If No Show is selected, the Reason for No Show field must be populated.**
 5. Select the **Magnifying Glass** icon  (also call reason for cancellation lookup graphic by screen readers) 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.

- **Note:** The **Free Text for Cancellation** field can be used for additional details regarding the appointment (e.g., spoke to Veteran’s family member to cancel the appointment).

Figure 23: Appointment Change Status Screen

7. Select the **Update** button  to save changes.
8. The appointment status is now displayed as **Canceled**.

Figure 24: Additional Referral Information Screen

Referral Number	Community Provider / Facility	Date	Time	Appointment for	Treating Specialty	Appointment Location	Provider Name or Location	Drive Time	Affiliation	Appointment Type	Scheduling Method	Status	Notes	Reason for Cancellation
VA0000000395	PINNACLE HEALTH CARDIOVASCULAR INSTITUT	10/08/2020	14:00	Initial outpatient evaluation and treatment for the referred condition on the consult order- CARDIOLOGY TESTS, PROCEDURES, STUDIES-1.0.6	Internal Medicine - Cardiovascular Disease	PINNACLE HEALTH CARDIOVASCULAR INSTITUT-1000 N FRONT ST, LEMOYNE, PA, 17043-207RC0000X	KUNAL N BODIWALA		CCN1	Outpatient		Cancelled		Cancelled by Patient
VA0000000347	PINNACLE HEALTH CARDIOVASCULAR INSTITUT	08/20/2020	14:00	Initial outpatient evaluation and treatment for the referred condition on the consult- CARDIOLOGY TESTS, PROCEDURES,	Internal Medicine - Cardiovascular Disease	PINNACLE HEALTH CARDIOVASCULAR INSTITUT-1000 N FRONT ST, LEMOYNE, PA, 17043-207RC0000X	KUNAL N BODIWALA		CCN1	Outpatient	Scheduled by Community Provider	Booked	First appointment scheduled for initial evaluation.	

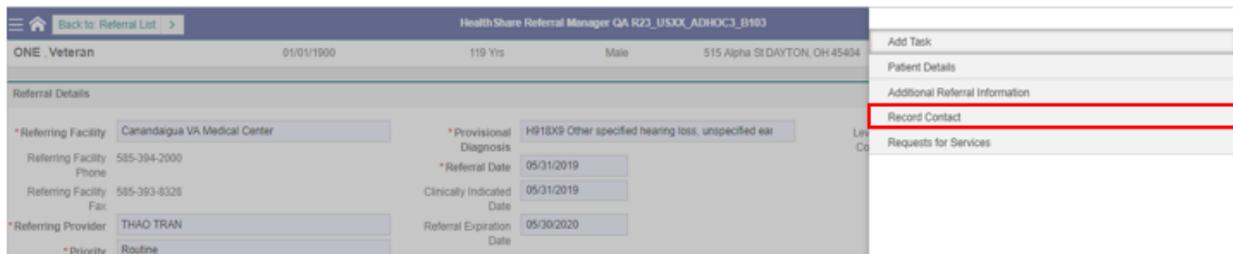
4.8. Record Contact

HSRM enables users to record any contact made with the Veteran, a community provider, or other person or organization regarding the referral. Anyone with access to the referral can view this information.

To record contact about a referral:

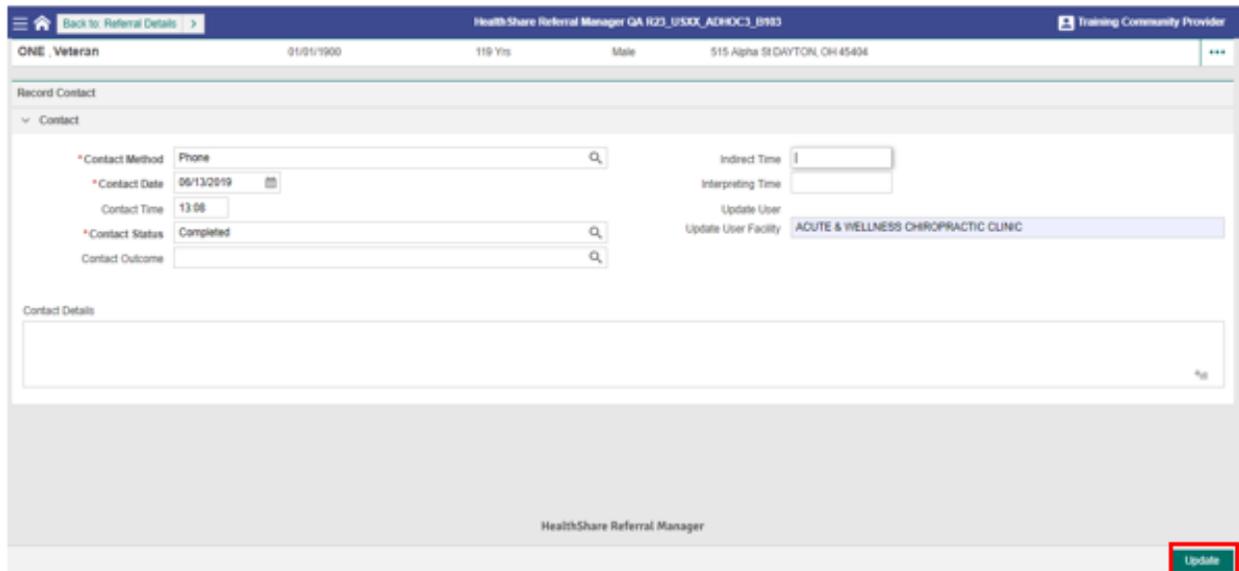
1. Locate the referral (see the Locate a Referral section of this guide).
2. Select the referral from the **Referral List**.
3. Select the **Action Menu** icon ******* (also called link referral list action menu by screen readers) on the **Patient Banner**.
4. Select **Record Contact** from the drop-down menu. The **Record Contact** screen appears.

Figure 25: Action Menu – Record Contact



5. Enter the relevant information regarding the contact and select the **Update** button  to save changes.

Figure 26: Record Contact – Record Contact Screen



4.9. View Additional Referral Information

Users can view additional information about a referral on the **Additional Referral Information** screen. This screen displays **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Notes**, and **Patient Letters**.

To view additional referral information:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Select the **Action Menu** icon **⋮** (also called link referral list action menu by screen readers) next to the corresponding referral row and select **Additional Referral Information**.
 - *Note: The **Action Menu** icon **⋮** (also called link referral list action menu by screen readers) is also available from the **Referral Details** screen in the **Patient Banner**.*

Figure 27: Referral List – Additional Referral Information

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIE

3. The **Additional Referral Information** screen appears, showing **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Notes**, and **Patient Letters** related to the referral. Select each to view the corresponding information.

Figure 28: Additional Referral Information

Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details
VA0000000718	02/11/2019 15:15	Phone		Spoke with Veteran directly
VA0000000718	02/11/2019 15:11	Phone		

Document Type	Description	Date Created	Time Created	Last Update User	Last Update Facility
RefDoc: Packet	RefDoc Packet	03/15/2019	11:44	Training FCC	Canandaigua VA Medical Center
Medical Documents	CT scan	03/14/2019	20:18	Training Community Provider	ACUTE & WELLNESS CHIROPRACTIC CLINIC

Description	Document Type	Date Created	Time Created

- *Note: Each of the lists can be sorted using the **Column Header** and **Advanced sorting methods**.*

4.10. Working with Tasks

A task in HSRM represents a discrete action that must be completed for a Veteran's referral. Tasks minimize administrative burdens and streamline communications. They enable VA and community providers to share information without having to pick up the phone. Automatic tasks serve as reminders for submitting medical documents and precertification information, minimizing potential delays in payment.

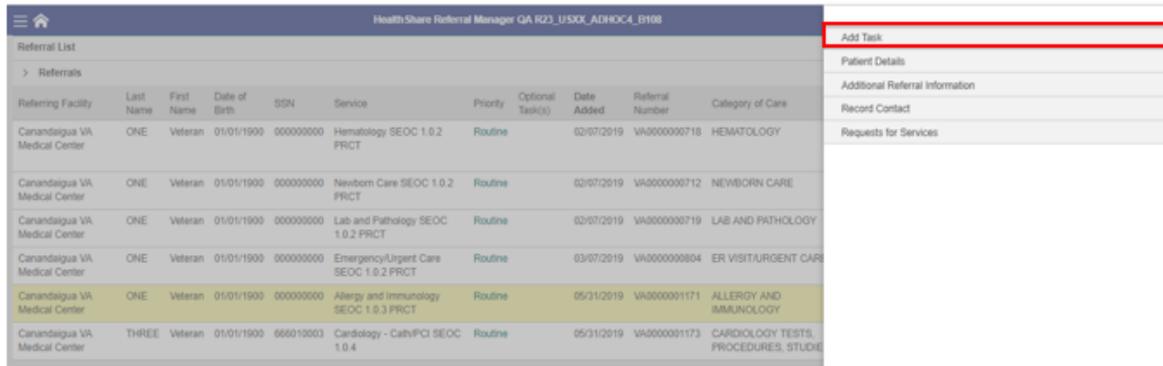
For example, a community provider will receive an auto-generated task from VA to submit medical documentation seven days after the referral status is changed to **Initial Care Given**. Alternatively, the community provider can create a manual task to communicate with VA (e.g., to request VA to contact the Veteran or to provide additional referral documents).

4.10.1. Create a Task

To manually create a task:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Select the **Action Menu** icon **⋮** (also called link referral list action menu by screen readers) next to the corresponding referral row, then select **Add Task**.
 - *Note: The **Action Menu** icon **⋮** (also called link referral list action menu by screen readers) is also available from the **Referral Details** screen in the **Patient Banner**.*

Figure 29: Action Menu Edit Task



3. The **Task Edit** screen appears. The **Patient Banner** displays demographic information for the patient associated with the referral.
4. Enter the appropriate information (e.g., **Task Item**, **Priority**, **Status**, **Comments**) to create the task. **Task Item**, **Priority**, **Status**, **Due Date**, and **Start Date** fields are mandatory (as denoted by the red asterisk) and can be edited (screen readers identify these fields as **Star** and **Required**).

Figure 30: Task Edit Screen

5. Select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) within each field to view and select available options.
6. Select the **Update** button  to save the task information.

4.10.2. View or Edit a Task

The **Task List** displays all task items for the facility. From the **Task List**, an item can be reviewed and edited.

To view or edit a task:

1. Select the **Menu** icon  (also called link menu for screen readers) and select **Task List** from the drop-down options.

Figure 31: Menu – Task List

SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
900 000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 066010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

2. Locate the task on the **Task List**.

- Select the task title in the **Task** column to navigate to the **Task Edit** screen (data in the **Task** and **Last Name** columns are displayed as hyperlinks). The **Task Edit** screen appears.
 - Note: Overdue tasks have a red indicator in the **Due Date** column (screen readers read the date to indicate overdue tasks).*

Figure 32: Task List Screen

Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender Date of Birth	Completed	Comments
04/26/2020	04/26/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/29/2020	04/29/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
05/07/2020	05/07/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	

- Review the task, including any comments.
- Edit the **Priority** and **Status** fields as needed. To do this, select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) within each field and select the appropriate option.
- Edit the **Comments** field.

Figure 33: Task Edit Screen

Task Edit

* Task Item: Provider Precert Communication

Due Date: 04/26/2020

* Priority: Basic

* Status: Pending

Assign Task to User:

Assigned To User:

Assign Task to Group: Community Provider

Assigned Facility:

Comments: Please review precertification information

HealthShare Referral Manager

Accept Task

- Select the **Update** button at the bottom right to save the task information and go back to the **Task List**.

Figure 34: Task List

Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender Date of Birth	Completed	Comments
04/26/2020	04/26/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/29/2020	04/29/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
05/07/2020	05/07/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	

- After editing the task, users can complete the task by selecting the task row to access the Referral Details screen.

Figure 35: Referral Details Screen

The screenshot shows the 'Referral Details' screen. At the top, there are several input fields:

- * Referring Facility: Buffalo VA Medical Center
- Referring Facility Phone: 716-834-9200
- Referring Facility Fax: 716-862-8533
- * Referring Provider: MERAZ H KHAN
- * Priority: Routine
- * Provisional Diagnosis: R52 Pain, unspecified
- * Referral Date: 10/04/2019
- Clinically Indicated Date: 10/04/2019
- Referral Expiration Date: 06/02/2020
- Level of Care Coordination: Unknown

 Below these fields is a section for 'Services Requested' with a dropdown for 'Category of Care' set to 'CARDIOTHORACIC SURGERY' and a field for '* Service Requested' set to 'Cardiothoracic Surgery SEOC 1.0.5 PRCT'. There is also a 'SEOC Details' link. A paragraph of text explains that the referral is only valid for services authorized under a SEOC and provides instructions for additional billing and referral information. At the bottom, there is an 'Authority' section with a field for '* Program Authority' set to 'Authorized Pre-authorized VA Referral (not otherwise specified) - 1703'.

- When the task has been updated, you are able to mark the task as complete.

4.10.3. Mark a Task Complete

From the **Task List**, an item can be marked as complete.

To mark a task as complete:

- Select the **Menu** icon (also called link menu for screen readers) and select the **Task List** option.

Figure 36: Menu – Task List

The screenshot shows the 'HealthShare Referral Manager' interface. On the left, there is a navigation menu with options: 'Referral List', 'Task List' (highlighted with a red box), 'Reports', and 'Tools'. The main area displays a table of tasks. The table has the following columns: SSN, Service, Priority, Optional Task(s), Date Added, Referral Number, Category of Care, Status, Community Provider / Facility, and Appt Date. The table contains several rows of task data.

SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
900 000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISITURGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/21/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 006010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/21/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

- Locate the task on the **Task List**.
- Select the box in the **Completed** column of the task.

Figure 37: Task List Screen

Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender Date of Birth	Completed	Comments
04/26/2020	04/26/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input checked="" type="checkbox"/>	
04/29/2020	04/29/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
04/30/2020	04/30/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	
05/07/2020	05/07/2020	VA0000002100	Provider Precert Communication	Pending	Basic		Community Provider		CARDIOTHORACIC SURGERY	HSRMPAT	Olivia	Female 03/25/1950	<input type="checkbox"/>	

4.11. Canned Text

Canned text automatically populates text fields with predefined text items. Selecting the **Canned Text** icon  (also called canned text graphic by screen readers) will display existing items in the canned text library. Users can create their own canned text to populate any text field that contains the **Canned Text** icon .

To create canned text:

1. Locate the referral (see the Locate a Referral section of this guide).
2. Navigate to the **Referral Processing Information** section. In the **Comments** box, enter the text you wish to save, highlight it, and select the **Plus** icon. This will take you to the **Canned Text** screen.
3. On the **Canned Text** screen, enter a code you wish to assign to the text. Select the **Update** button at the bottom right to save the canned text.

4.12. Generate Reports

HSRM can generate reports that display the types of services that are referred to a specific community provider/facility, as well as the current status of the referrals sent during the selected period.

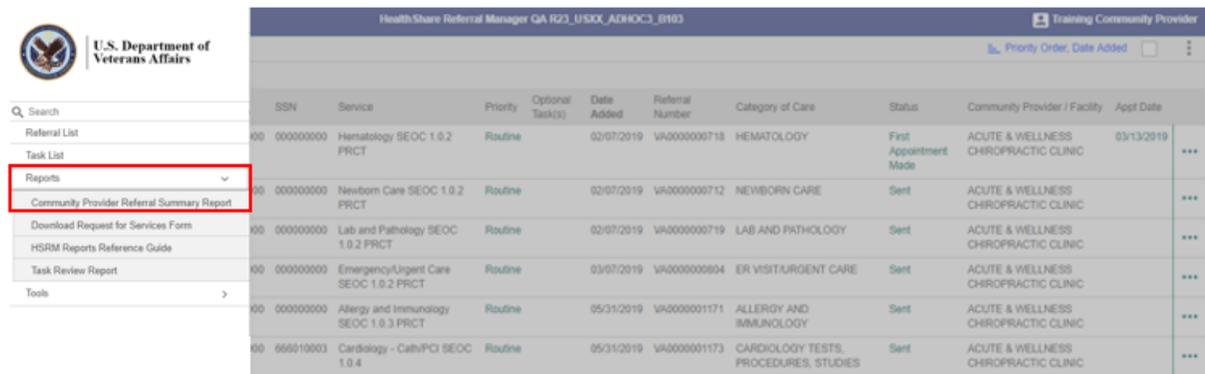
Table 1: HSRM Report Types

Report Type	Description
Community Provider Referral Summary Report	This report allows VA staff and community providers to generate a tailored list of referrals that have been sent to a community provider or facility. This gives community providers a list of referrals received from VA during a specified period.
Download Request for Services (RFS) Form	This paper RFS form may be uploaded into HSRM.
HSRM Reports Reference Guide	This report provides VA staff and community providers with the definitions and uses of all reports that they have access to.
Veterans Appointment Report	Displays all the appointments at a specified VA or community provider facility. Report fields include the appointment date, appointment status, level of care coordination, as well as referral details.

To run a report:

1. Select the **Menu** icon  (also called link menu for screen readers), select **Reports**, and choose **Community Provider Referral Summary Report**.

Figure 38: Menu – Community Provider Referral Summary Report



- *Note: The **HSRM Reports Reference Guide** option, located in **Reports**, provides directions and detailed information about the report.*
2. Select the criteria needed to run the desired report from the fields available and select the **Preview** icon (also called “link graphic link opens Excels in a new window graphic preview” by screen readers) to run the report.

Figure 39: Community Provider Referral Summary Report Parameters



3. Navigate to the report. Reports may generate in PDF format or as Excel documents and can be saved or printed.
 - *Note: To print the report from Chrome, select the **Print** icon at the top right of the report. To print from Internet Explorer, select the **Print File** icon at the bottom of the report.*

4.13. Billing and Other Referral Information

The **Billing and Other Referral Information** sheet provides community providers with additional details related to the legal authority, claims submissions instructions, precertification requirements, and provision of prescriptions and durable medical equipment for the referral. Community providers can access this information sheet directly from the **Referral Details** screen. The information is also available on the **Offline Referral Form**. The information sheet will contain appropriate content based on the program authority. For example, a referral authorized as a Veterans Care Agreement, Community Care Network, or 1728 service-connected emergency care referral would contain content specific to that program.

To access the **Billing and Other Referral Information** sheet:

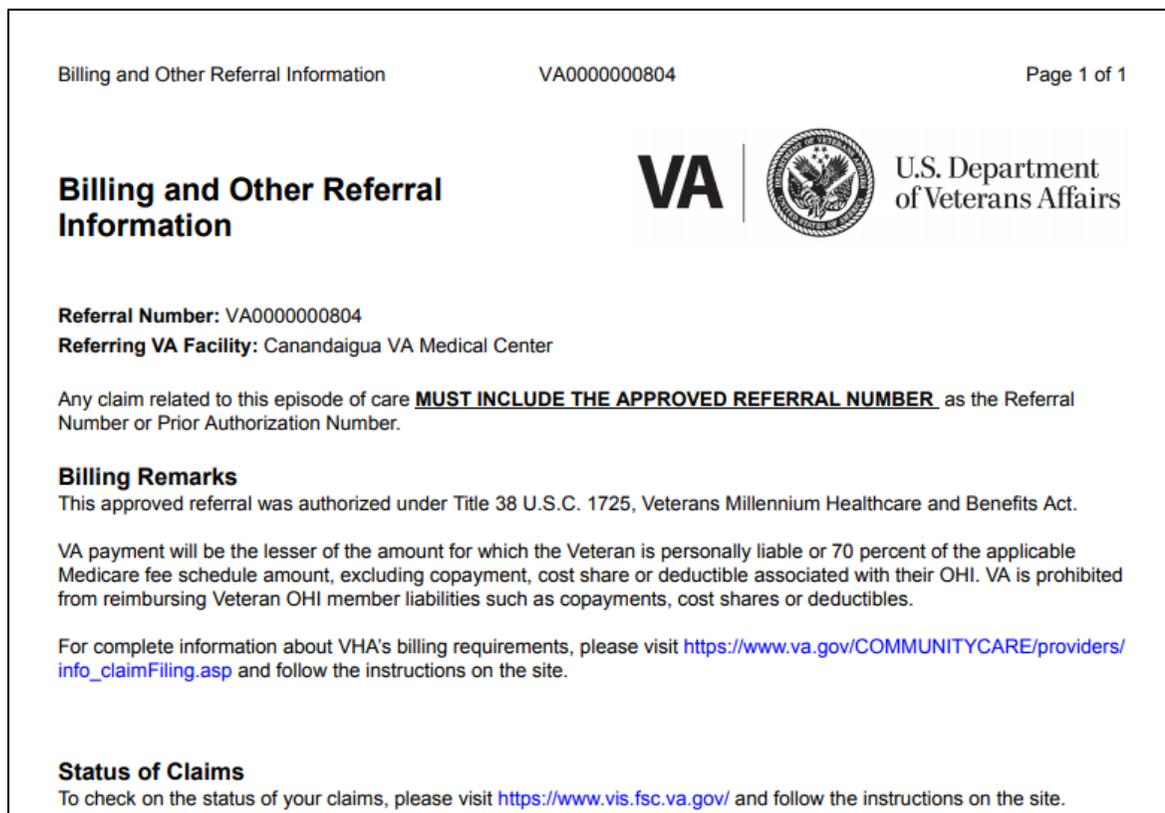
1. Locate the referral (see the Locate a Referral section of this guide).
2. From the **Referral Details** screen, select the **Component Menu** icon  (also called referral list component menu button by screen readers), then select **Billing and Other Referral Information**.

Figure 40: Component Menu – Billing and Other Referral Information



3. The **Billing and Other Referral Information** sheet appears in a new browser tab and can be printed, downloaded, and saved as a PDF file.

Figure 41: Component Menu – Billing and Other Referral Information Sheet



5. Additional Resources

Contact the HSRM Help Desk for support. Open a ticket by phone at 1-844-293-2272 or email hsrmsupport@va.gov.

Additionally, the following websites provide quick and easy access to commonly needed materials:

- [VA Community Care Website](#)
- [HSRM Support Points of Contact List](#)
- [Community Provider Information Sheet](#)

Appendix A: Acronyms and Abbreviations

Table 2: Acronyms and Abbreviations

Acronym or Abbreviation	Definition
Admin	Administrator
CBOC	Community-Based Outpatient Clinic
CCN	Community Care Network
EDI	Electronic Data Interchange
EOC	Episode of Care
HSRM	HealthShare Referral Manager
IT	Information Technology
NPI	National Provider Identifier
OHI	Other Health Insurance
OS	Operating System
PDF	Portable Document Format
PPMS	Provider Profile Management System
RFS	Request for Services
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
TPA	Third-Party Administrator
TRAIN	Training Finder Real-time Affiliate Integrated Network
VA	U.S. Department of Veterans Affairs
VAMC	Veterans Affairs Medical Center
VCA	Veterans Care Agreement
VHA	Veterans Health Administration
VISN	Veterans Integrated Service Network