

HealthShare Referral Manager Clinical Viewer Quick Reference Guide

Community Care Referral and Authorization | March 2024

HealthShare Referral Manager

HealthShare Referral Manager (HSRM) is an electronic referral and authorization processing system used by the Department of Veterans Affairs (VA) to accelerate Veterans' access to community care. HSRM allows VA, third-party administrators (TPAs), and community providers to better manage community care referrals and authorizations. HSRM facilitates a reduction in turnaround time for processing referrals, providing care, submitting claims, and receiving payment. This quick reference guide (QRG) is one of several guides that will help users get the most out of HSRM.

Quick Reference Guide Topics

- » Clinical Viewer and HSRM
- » Locate a Referral
- » Using Clinical Viewer
- » Help with HSRM

Clinical Viewer and HSRM

The Clinical Viewer portal offers users a comprehensive view of a Veteran's medical history in HSRM. Categories of information available in Clinical Viewer include clinical summaries of the patient's history, allergies, immunizations, medications, lab results, procedures, and more. HSRM uses the Veterans Data Integration and Federation Enterprise Platform (VDIF-EP) to gather and consolidate patient history information. The information is filtered into relevant categories in Clinical Viewer. This gives HSRM users a secure, centralized source for the medical history and patient details of a Veteran in HSRM.



- » *Note: The following security groups do not have access to Clinical Viewer: VA View Only, VA Reporting Only, VA Print Only, Community Care Network (CCN) 1 – 6, Community View Only, TriWest, VA Claims Adjudication and Reimbursement (CAR) Staff, and VA CAR Supervisor.*

Locate a Referral


HSRM allows users to locate referrals quickly and manage them according to their priority. When logging in to HSRM, the Referral List screen—which is also the home screen—appears. Users can treat the Referral List as a to-do list, as it shows all referrals from VA in a central location. Users can locate a specific referral using the Referral List.

The Referral List contains a sorting feature that allows users to quickly organize referrals based on a variety of criteria.

To locate a referral using the Referral List:

1. Select the **Menu** icon  at the top left of the screen.
2. Select **Referral List** from the drop-down menu to navigate to the **Referral List** screen.
3. Locate the referral by sorting the list (e.g., Last Name, First Name), or by using the **Find Referrals** or **Find Referral by Patient** search features, both of which are available by selecting the **Menu** icon  on any screen in HSRM.
4. Select the row of the referral to view the referral details.

Using Clinical Viewer

Clinical Viewer is accessible from the Referral Details screen for any Veteran that has relevant data in the system. The Clinical Viewer icon  will be available on the Patient Banner to access patient data.

To access Clinical Viewer:


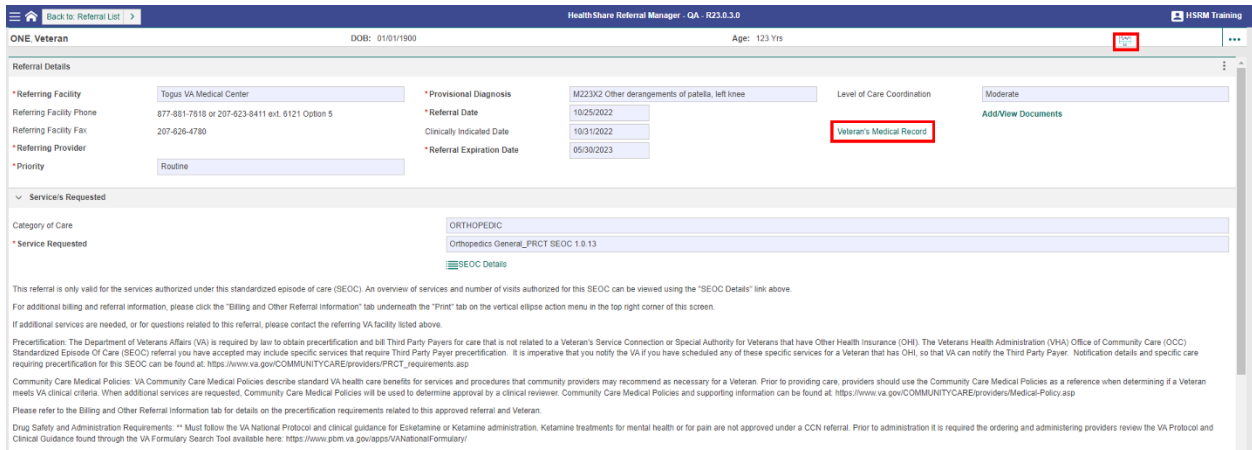
1. Locate the Veteran's referral (see the **Locate a Referral** section of this guide).
2. Select the **Clinical Viewer** icon  on the Patient Banner or select the **Veteran's Medical Record** link on the **Referral Details** screen.

Exhibit 1: Referral Details Screen



3. If the user selects the Clinical Viewer icon, a menu on the right side of the screen will open. Select the Veteran's Medical Record option. Alternatively, if the user instead selects the **Veteran's Medical Record** link in the **Referral Details** section of the screen, it will bypass the menu in **Exhibit 2** and take user directly to Clinical Viewer.

Exhibit 2: Clinical Viewer Access Menu

HealthShare Referral Manager - QA - R23.0.3.0

ONE Veteran DOB: 01/01/1900 Age: 123 Yrs Veteran's Medical Record

Referral Details

* Referring Facility	Togus VA Medical Center	* Provisional Diagnosis	R071 Chest pain on breathing	Referral Category	Inpatient
Referring Facility Phone	877-881-7618 or 207-823-8411 ext. 6121 Option 5	* Referral Date	10/09/2023	Level of Care Coordination	Moderate
Referring Facility Fax	207-626-4780	Clinically Indicated Date	10/15/2023		Add View Doc
* Referring Provider		* Referral Expiration Date	12/08/2023	Veteran's Medical Record	
* Priority	Routine				

Services Requested

Category of Care: CARDIOLOGY

* Service Requested: Cardiology Cath - PCI_REV_PRCT SEOC 1.1.13

SEOC Details

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 ellipsis 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.

Pre-certification: The Department of Veterans Affairs (VA) is required by law to obtain pre-certification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration Standardized Episode of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer pre-certification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has OHI, so that VA can notify the Third Party Payer requiring pre-certification for this SEOC can be found at: https://www.va.gov/COMMUNITYCARE/providers/PRCT_requirements.asp

Community Care Medical Policies: VA Community Care Medical Policies describe standard VA health care benefits for services and procedures that community providers may recommend as necessary for a Veteran. Prior to providing care, providers should use the Community Care Medical Policies VA clinical criteria. When additional services are requested, Community Care Medical Policies will be used to determine approval by a clinical reviewer. Community Care Medical Policies and supporting information can be found at: <https://www.va.gov/COMMUNITYCARE/providers/medica>

Please refer to the Billing and Other Referral Information tab for details on the pre-certification requirements related to this approved referral and Veteran.

Drug Safety and Administration Requirements: ** Must follow the VA National Protocol and clinical guidance for Eszopiclone or Katamine administration. Katamine treatments for mental health or pain are not approved under a CCH referral. Prior to administration it is required the ordering and Clinical Guidance found through the VA Formulary Search Tool available here: <https://www.pbm.va.gov/apps/VA/NationalFormulary/>

Must follow the VA Patient Safety Guidelines and complete the required Patient Safety Training found here: <https://www.va.gov/COMMUNITYCARE/providers/ESU/> Training.asp

- The **Clinical Summary** page will open, displaying an overview of the patient's medical history in HSRM. This is the home screen for Clinical Viewer. Specific categories of information available for viewing are in a list called the **Chartbook**, as shown in **Exhibit 3**. Select one of the categories in the Chartbook to view it.

Exhibit 3: Clinical Viewer Home Screen

Back to Referral List

HSRM Training

Chartbook

- Clinical Summary
- Conditions
- Allergies
- Medications
- Documents
- Immunizations
- Vital Signs
- Lab Results
- Diagnostic Studies
- Procedures
- Histories
- Encounters
- Appointments
- Care Team
- Cohorts
- Claims
- Demographics

Diagnoses (Sorted by Last Updated, Diagnosis)

Diagnosis	Type	Last Updated
Encounter for immunization	PRIMARY	11/02/2023 10:58
Encounter for immunization	PRIMARY	11/02/2023 11:53
PROPHY VACC. STREP PNEU	PRIMARY	01/20/2012 09:15
VACCINATION FOR DTP-DTAP	SECONDARY	01/20/2012 09:15
VACCIN FOR INFLUENZA	SECONDARY	01/20/2012 09:15

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Allergies (Sorted by Last Updated, Category)

Allergen	Reaction	Source	Category	Last Updated
PENICILLIN			DRUG	11/09/2011 11:45

Medications (Sorted by Start Date, Medication)

Medication	Dose	Start Date	Details
PRIMARY CARE REFERRAL/NOPC		01/13/2012 09:58	⋮
BACK/JOINT		12/08/2011 08:44	⋮
Non-Formulary Drug Request Primary Care		12/08/2011 08:54	⋮
Women's Health/NOPC		12/08/2011 08:44	⋮
EXERCISE CLEARANCE		11/10/2011 10:28	⋮

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Lab Results

Order	Results	Collection Date	Details
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Diagnostic Studies

Study	Ordering Clinician	Order Date	Test Date	Status
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Documents [Across All Episodes] (Search, Grouped, Sorted)

Document	Source	Facility	Event Date	Details
> Consult Report				
> Progress Note				

» *Note: All information in Clinical Viewer is read-only, so users will not be able to print or download any information or documentation. Attempting to save images or data from Clinical Viewer may present security risks. Users must remove any saved data or images from their device after use.*

The user group that employs HSRM to directly access Clinical Viewer is known as **HealthShare (HS) Clinical Viewer**. Upon logging in to HSRM, they will see a **Patient Find** search that allows them to look up patients with a variety of criteria, including demographic and patient record information. After the user generates a search, a list of patients that meet the search criteria is displayed on the screen.

Exhibit 4: Patient Find Screen

On most Chartbook pages, the information available to the user will appear in a list. There are multiple ways to adjust the lists to find specific items, including using the sorting feature.

To sort a list in Clinical Viewer:

1. Select the **Sort** icon  at the top of the list.

Exhibit 5: Sorting a List

Diagnosis	Facility	Status	Type	Last Updated
VA CNTRL WSTRN MASSCHUSETS HCS				
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/09/2011 10:50
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/09/2011 11:56
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/09/2011 11:56
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/09/2011 11:56
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/10/2011 10:13
LACK OF HOUSING	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/15/2011 15:53
OPIOID DEPENDENCE UNSPECIFIED	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	11/15/2011 15:53
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/15/2011 15:53
HX RETRN MILITARY DEPLOY	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	11/22/2011 08:30
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/02/2011 09:30
POSTTRAUMATIC STRESS DIS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	12/08/2011 10:00
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/08/2011 10:00
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/08/2011 08:00
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	12/15/2011 15:30
CHR ISCHEMIC HRT DIS NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/09/2012 08:40
OTH UNSP COUNSEL	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/10/2012 14:36
HYPERKINETIC SYND NOS	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/13/2012 09:30
VACCINATION FOR DTP-DTAP	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	01/20/2012 09:15
PROPHY VACC STREP PNEU	VA CNTRL WSTRN MASSCHUSETS HCS	Active	PRIMARY	01/20/2012 09:15
VACCIN FOR INFLUENZA	VA CNTRL WSTRN MASSCHUSETS HCS	Active	SECONDARY	01/20/2012 09:15




2. Select the **Ascending**  or **Descending**  options to sort the information by any available category. Users can also use the **Secondary Sort** option (if applicable) to sort the data in each category if multiple sorting options are available.

Exhibit 6: Sorting Options

The screenshot shows the HSRM Clinical Viewer interface. On the left is a 'Chartbook' sidebar with categories like Clinical Summary, Conditions, Allergies, Medications, Documents, Immunizations, Vital Signs, Lab Results, Diagnostic Studies, Procedures, Histories, Encounters, Appointments, Care Team, Cohorts, Claims, Demographics, and Insurance. The main area displays a table of diagnoses for 'VA CNTRL WSTRN MASSCHUSETS HCS'. The table has columns for Diagnosis, Facility, Status, and Type. On the right is a 'Filter' and 'Sort' panel. The 'Filter' section includes 'Date From' and 'Date To' fields, a 'Group' section with a 'Facility' search box, and a 'Sort' section. The 'Sort' section has a 'Primary Sort' dropdown menu where 'Diagnosis' is selected and highlighted with a red box. Below it are 'Last Updated' and 'Type' options. At the bottom of the panel are 'Reset' and 'Apply' buttons.

3. Select the **Apply** button . The list will sort according to the chosen criteria.

In addition to sorting a list, users can filter by **Date From** and **Date To** for results within a specific time period.

To filter by date:



1. Select the **Sort** icon  at the top of the list.
2. Populate the **Date From** and **Date To** fields and select the **Apply** button . The list will only display results within that specific time frame.

Exhibit 7: Filter by Date

The screenshot shows the HSRM Clinical Viewer interface, similar to Exhibit 6. The 'Filter' and 'Sort' panel on the right is the focus. The 'Date From' and 'Date To' fields are highlighted with a red box. The 'Sort' section below shows 'Diagnosis' selected as the primary sort, and 'Last Updated' and 'Type' as secondary options. The 'Apply' button is visible at the bottom of the panel.

Users can also group the lists by certain available criteria.

To group a list in Clinical Viewer:



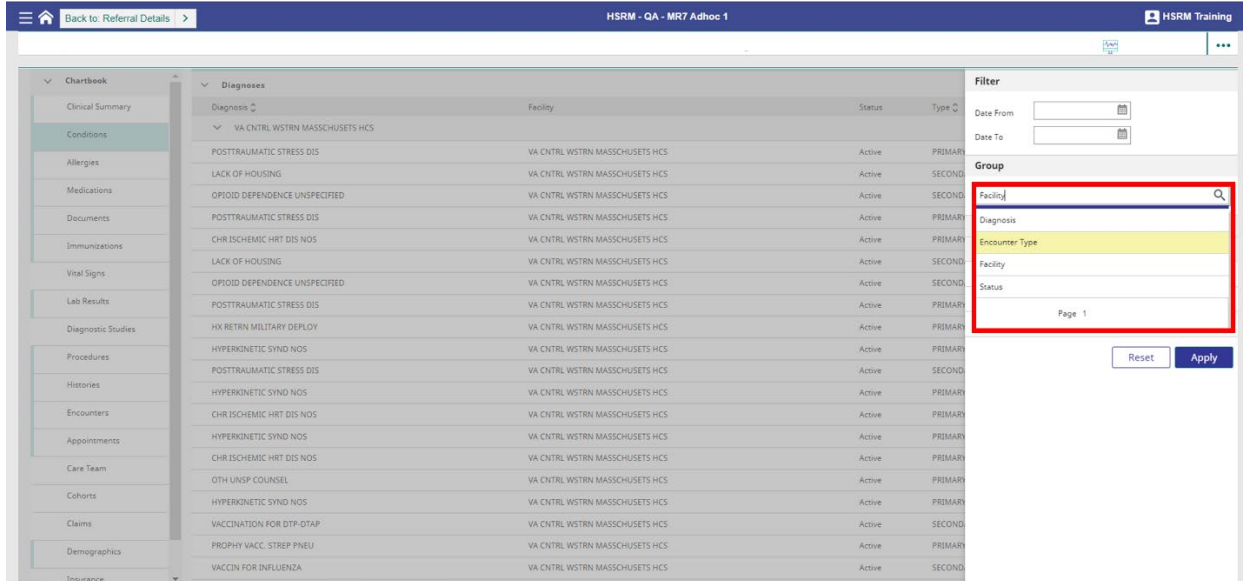
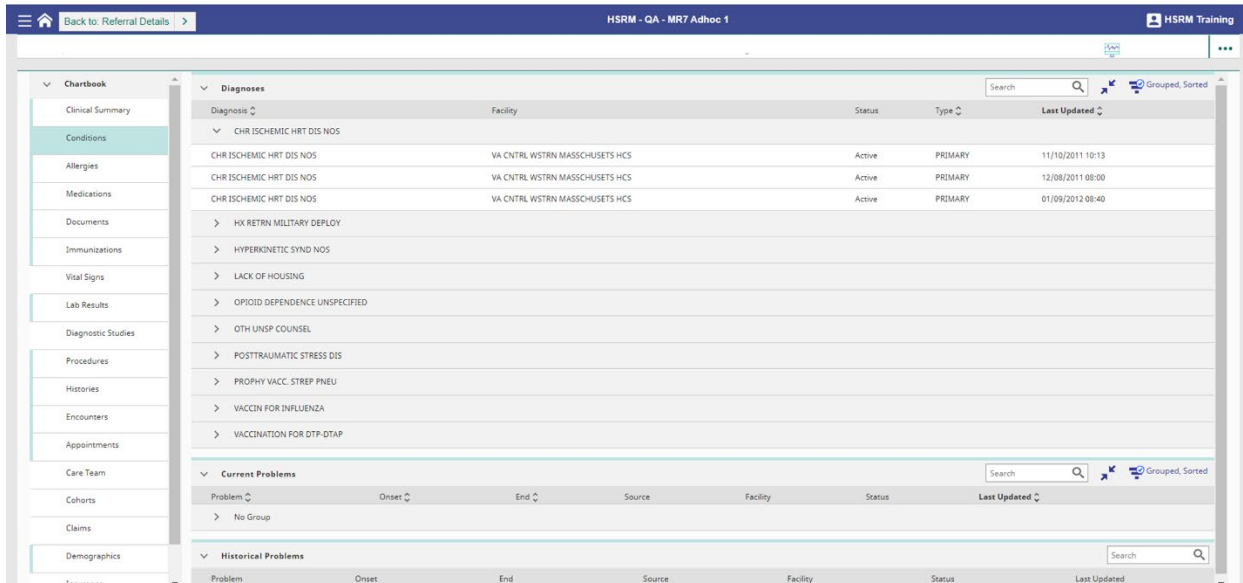
1. Select the **Sort** icon  at the top of the list.
2. Select the **Group** field, choose a category to group the information, and select the **Apply** button .

Exhibit 8: Advanced Sort Menu – Group



3. The list is now grouped according to the chosen category.

Exhibit 9: Conditions Page Sorted by Diagnoses

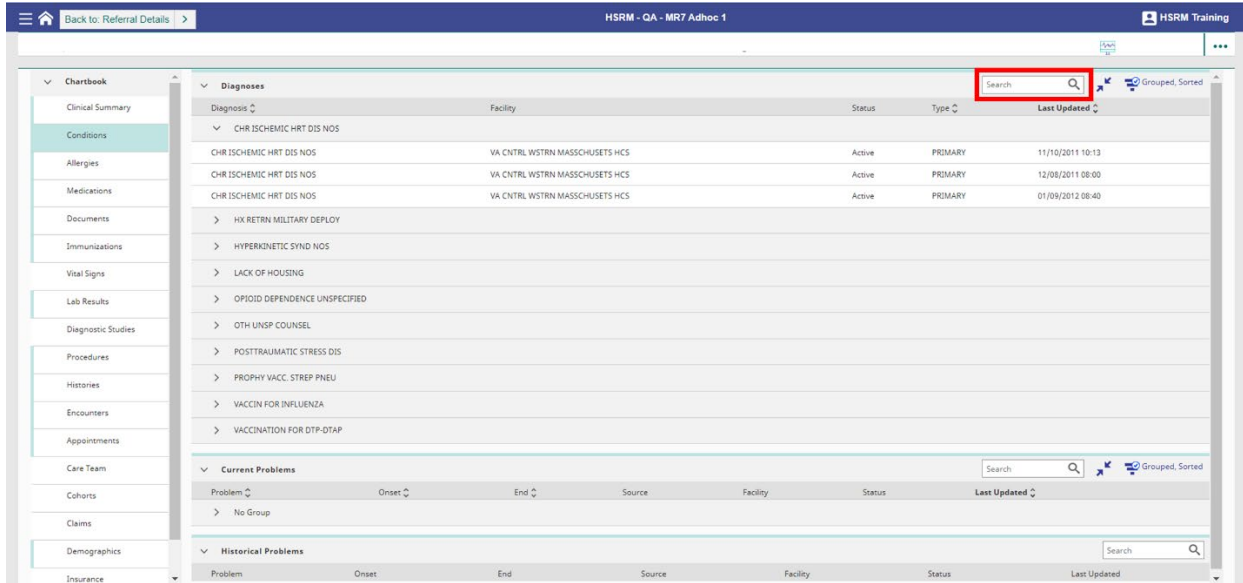


Clinical Viewer also offers a search bar on select pages to filter lists and help locate specific information.

To use the search feature:

1. Enter the desired search criteria into the search bar and select the **Magnifying Glass** icon (also called lookup graphic by screen readers) or the **Enter** key on the keyboard.
2. The list will filter to only show entries that match the selected search criteria.

Exhibit 10: Search Bar



In addition to what displays on the screen that the user is searching, the search feature will also search within entries or records on each Chartbook list. If the user searches the word “appointment,” for example, all results in that Chartbook category that include the word “appointment” in their title will appear, as well as any records that may not have the word “appointment” in the title but include it in their details, documents, or specific information.


Users can view specific information about each data entry or record within a specific Chartbook category. Select the **Details** icon  on the row for the specific item on the list. This allows users to view documents, details, or more specific information pertinent to the respective record in Clinical Viewer.

Exhibit 11: Immunization Details

Immunization	Dose	Source	Administration Date	Administration Date 2	Administration Date 3	Details
DTAP, UNSPECIFIED FORMULATION						
DTAP, UNSPECIFIED FORMULATION			01/20/2012 09:15			
FLU3 YRS (HISTORICAL)						
FLU3 YRS (HISTORICAL)			01/20/2012 09:15			
PNEUMOCOCCAL UNSPECIFIED FORMULATION						
PNEUMOCOCCAL UNSPECIFIED FORMULATION			01/20/2012 09:15			
TDAP						
TDAP			01/20/2012 09:15			

Help with HSRM

Community providers can request assistance with HSRM by contacting the HSRM Help Desk, opening a ticket by phone at (844) 293-2272 or by email at hsrmsupport@va.gov.

VA staff should contact the Enterprise Service Desk (ESD) for HSRM support. The ESD can be reached by phone at (855) 673-4357 or through the [online self-service feature](#). Tickets should be routed to the **HSRM - Tier 1** queue.