

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 Department of Veterans Affairs (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 third 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.

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. Use 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 at hsrmsupport@va.gov.
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 into 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 clicking 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 clicking on it.
2. Click on a column heading to sort data in ascending order by that category. Click it a second time to sort in descending order. Click it a third time to sort by the default, **Priority Order** and **Date Added**.
3. Click on the row of the relevant referral to access the **Referral Details** screen.

Figure 2: Referral List

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 clicking 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 clicking on it.
2. Click the blue hyperlink of the Referral List to activate Advanced Sort (for screen readers select the link referral list sorted by **Priority Order**, ascending **Date Added** secondary sort, press enter to activate the **Advanced Sort** option).

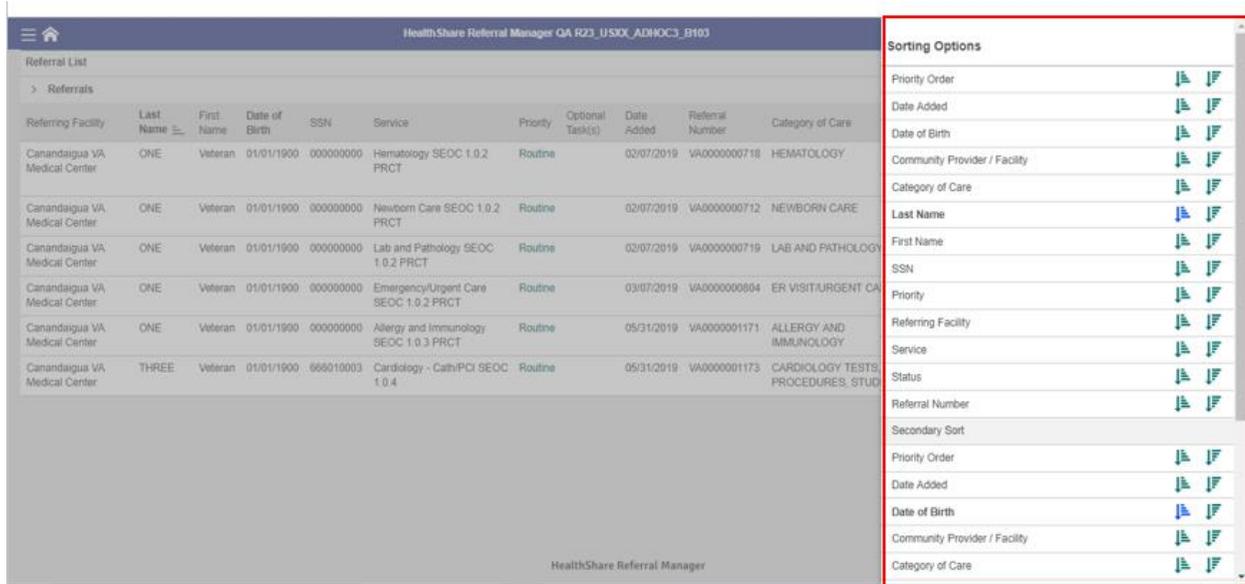
Figure 3: Referral List – Advanced Sort

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	

3. The available options appear. Both primary and secondary sort criteria can be selected. Select the priority order Ascending icon  (also called priority order sorted ascending button for screen readers) or Descending icon  (also called priority order sorted descending button for screen readers) associated with the specific criterion for the sort. 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. Click 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 clicking on the referral row.
 3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen. Click the **Magnifying Glass** icon  (also called status lookup graphic for screen readers) 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 life cycle.
- **Note:** If the **Rejected** status is selected, the **Referral Reason** field will be mandatory.

Figure 5: Referral Details – Status Field

The screenshot displays the 'Referral Details' screen for a veteran. The patient information at the top includes: ONE, Veteran; 01/01/1900; 119 Yrs; Male; 515 Alpha ST DAYTON, OH 45404. The 'Referral Processing Information' section is expanded, showing a dropdown menu for 'Status' with 'Accepted' selected. The 'Comments' field is empty. The 'Update' button is highlighted with a red box.

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

HealthShare Referral Manager QA R24_USXX_ADHOC1

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

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

Service/s Requested
 Category of Care: ALLERGY AND IMMUNOLOGY
 * Service Requested: Allergy and Immunology SEOC 1.0.3 PRCT
 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 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.

Precertification: The Department of Veterans Affairs (VA) is required by law to obtain precertification 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 (VHA) Office of Community Care (OCC) Standardized Episode of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer precertification. 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. Notification details and specific care requiring precertification for this SEOC can be found at: https://www.va.gov/communitycare/providers/precert_requirements.asp

Apply Update

4. Review the Procedural Overview for the SEOC.

Figure 7: SEOC Details Screen

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103

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

Procedural Overview

Allergy and Immunology SEOC 1.0.3 PRCT

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 section of this guide).

2. Click on the row of the referral to navigate to the **Referral Details** screen.
3. Click the **Component Menu** icon  (also called referral list component menu button by screen readers) of the **Referral Details**, then select **Offline Referral Form** from the **Print** drop-down menu.

Figure 8: Component Menu – Offline Referral Form



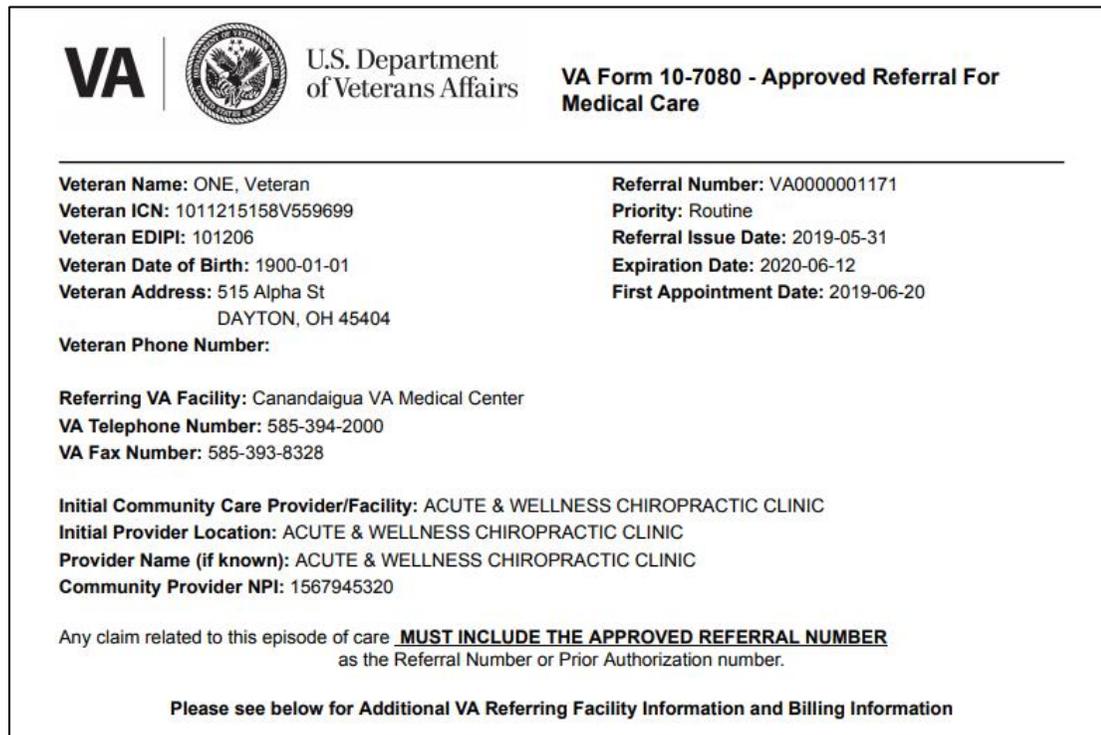
The screenshot shows the 'Referral Details' page for a veteran. The top navigation bar includes 'Back to: Referral List' and 'HealthShare Referral Manager QA R23_US0X_ADHOC3_B103'. The patient information at the top reads: ONE Veteran, 01/01/1900, 119 Yrs, Male, 515 Alpha St DAYTON, OH 45404. The 'Referral Details' section contains the following information:

- Referring Facility: Canandaigua VA Medical Center
- Referring Facility Phone: 585-394-2000
- Referring Facility Fax: 585-393-8328
- Referring Provider: THAO TRAN
- 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: 05/30/2020
- Category of Care: ALLERGY AND IMMUNOLOGY
- Service Requested: Allergy and Immunology SEOC 1.0.3 PRCT

A 'Print' button is located in the top right corner, with a dropdown menu open below it. The dropdown menu options are: Print, Offline Referral Form (highlighted in red), Billing and Other Referral Information, and Options.

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

Figure 9: Offline Referral Form



The form is titled 'VA Form 10-7080 - Approved Referral For Medical Care' and is issued by the U.S. Department of Veterans Affairs. It contains the following information:

Veteran Information:
Veteran Name: ONE, Veteran
Veteran ICN: 1011215158V559699
Veteran EDIPI: 101206
Veteran Date of Birth: 1900-01-01
Veteran Address: 515 Alpha St, DAYTON, OH 45404
Veteran Phone Number:

Referral Information:
Referring VA Facility: Canandaigua VA Medical Center
VA Telephone Number: 585-394-2000
VA Fax Number: 585-393-8328

Initial Community Care Provider/Facility: ACUTE & WELLNESS CHIROPRACTIC CLINIC
Initial Provider Location: ACUTE & WELLNESS CHIROPRACTIC CLINIC
Provider Name (if known): ACUTE & WELLNESS CHIROPRACTIC CLINIC
Community Provider NPI: 1567945320

Referral Details:
Referral Number: VA0000001171
Priority: Routine
Referral Issue Date: 2019-05-31
Expiration Date: 2020-06-12
First Appointment Date: 2019-06-20

Any claim related to this episode of care **MUST INCLUDE THE APPROVED REFERRAL NUMBER** as the Referral Number or Prior Authorization number.

Please see below for Additional VA Referring Facility Information and Billing Information

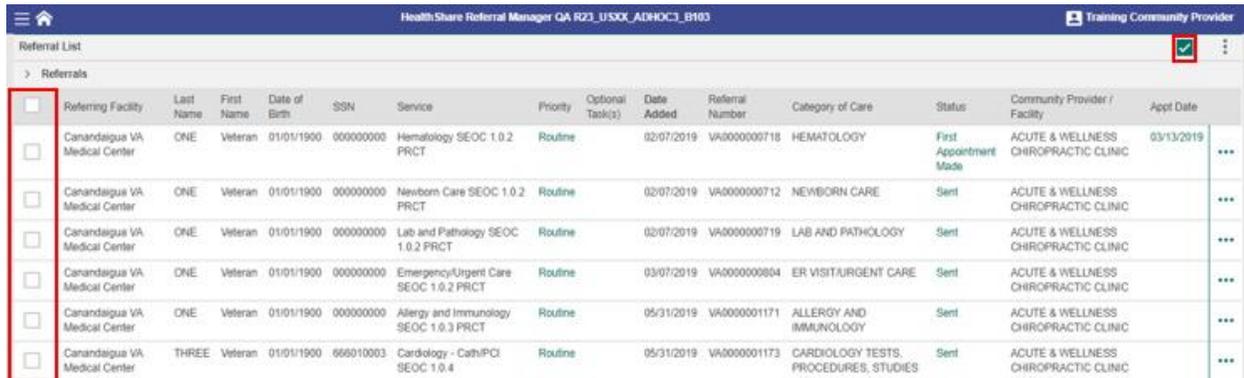
- *Note: If you are using Chrome as your browser, you will need to download and save the form to your computer. If you are using Internet Explorer as your browser, use the **Save and Copy** feature to save to your computer.*

4.4.2. Multiple Referrals

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

1. Navigate to the **Referral List** by clicking 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 clicking 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. Click 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 click 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
<input type="checkbox"/>	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
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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. Click 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	Status	Community Provider / Facility	Appt Date
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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	

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
ONE, Veteran	VA0000000719	2019-02-07	Canandaigua VA Medical Center	LAB AND PATHOLOGY	ACUTE & WELLNESS CHIROPRACTIC CLINIC
ONE, Veteran	VA0000000801	2019-03-07	Canandaigua VA Medical Center	CARDIOLOGY IMAGING	ACUTE & WELLNESS CHIROPRACTIC CLINIC
ONE, Veteran	VA0000000804	2019-03-01	Canandaigua VA Medical Center	ER VISIT/URGENT CARE	ACUTE & WELLNESS CHIROPRACTIC CLINIC

- *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 clicking on the referral row.
 3. Click **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 [4.9 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 clicking on the referral row.
3. Click **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. Click the **New** button . 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. Click the **Upload** button  and select the file from the computer's hard drive.

7. To identify the type of document, click 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. Click the **Update** button  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. Click on the referral to navigate to the **Referral Details** screen.
3. Click 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



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

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, click the **PPMS Provider Search** link.

Figure 17: Record Appointment Screen – PPMS Provider Search

2. Enter the provider's NPI in the **NPI** field.
3. Click 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 'Back to: Record Appointment' and 'HealthShare Referral Manager Demo R24_USXX_ADHOC9_B126'. Below this, a patient profile is visible: 'ONE, Veteran', '01/01/1900', '120 Yrs', 'Male'. The main search area contains the instruction 'To find a provider, enter a valid NPI' and a text input field with 'NPI 1093818106' entered. Below the input field is a table with columns: 'Specialty', 'Care Provider', 'Affiliation', 'Phone', 'Care Site', 'Address', 'Drive Time', and 'Distance'. The table is currently empty. At the bottom right, there is a 'Find' button.

4. **Select** the appropriate provider.

Figure 199: PPMS Provider Search Screen – NPI Search Results

The screenshot shows the 'PPMS Provider Search' interface with search results. The patient profile is the same as in Figure 18. The search input field now shows '* NPI 1093818106'. Below the input field, it says 'Records found: 2 (0s)'. A table displays the results with columns: 'Specialty', 'Care Provider', 'Affiliation', 'Phone', 'Care Site', 'Address', 'Drive Time', 'Distance', 'Provider NPI', and 'High Performing Provider'. Two results are shown, both for 'Pharmacy - Community/Retail Pharmacy'.

Specialty	Care Provider	Affiliation	Phone	Care Site	Address	Drive Time	Distance	Provider NPI	High Performing Provider
Pharmacy - Community/Retail Pharmacy	B & B PHARMACY	CCN1	828-252-2718	B & B PHARMACY-462 HAYWOOD RD, ASHEVILLE, NC, 28806-3336C0003X	462 HAYWOOD RD, ASHEVILLE, NC, 28806			1093818106	Unknown
Pharmacy - Community/Retail Pharmacy	B & B PHARMACY	TriWest - PC3	8282522718	B AND B PHARMACY-462 HAYWOOD RD, ASHEVILLE, NC, 28806-3336C0003X	462 HAYWOOD RD, ASHEVILLE, NC, 28806			1093818106	Unknown

- **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.**

Figure 20: Record Appointment Screen

1. Click 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 an Appointment 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. Click 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 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 VISITURGENT 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 click 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
VA0000000718	02/11/2019 15:15	Phone		Spoke with Veteran directly
VA0000000718	02/11/2019 15:11	Phone		

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
VA0000001044	Maine Coast Memorial	05/16/2019	14:00	Emergency evaluation and treatment for the referred condition and specified treatment date indicated on the consult.	Emergency Medicine	Maine Coast Memorial - Coastal Health Center	JOSEPH FIELD			Outpatient		Booked		
VA0000000714	Mercy Pain Center	04/30/2019	15:00	Initial outpatient evaluation for this episode of care	Cardiovascular Disease (Cardiology)	Mercy Pain Center	Mercy Pain Center			Outpatient		Canceled		Canceled by Patient
VA0000000963	Miles Memorial Hospital - MMC	04/30/2019	15:00	Pre-operative medical and cardiac clearance as indicated, to include H+Plabs, EKG, CXR - Cardiology - CathPCI	Physical Therapist in Private Practice	LincolnHealth Wellness and Rehab - MMC	LincolnHealth Wellness and Rehab - MMC			Outpatient		Booked		
VA0000000714	Mercy Pain Center	04/10/2019	15:56	A maximum of twelve (12) acupuncture visits is approved for this episode of care. Approved services include acupuncture with or without electrostimulation. A maximum of one additional unit of acupuncture (with or without	Cardiovascular Disease (Cardiology)	Mercy Pain Center	Mercy Pain Center			Outpatient		Booked		

- Note: The **Change Status** screen can also be accessed by clicking 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, click 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. Click 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. Click the **Update** button  to save changes.
8. The appointment status is now displayed as **Canceled**.

Figure 24: Additional Referral Information Screen

Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details
VA000000718	02/11/2019 15:15	Phone	Spoke with Veteran directly	
VA000000718	02/11/2019 15:11	Phone		

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
VA000001044	Maine Coast Memorial	05/15/2019	14:00	Emergency evaluation and treatment for the referred condition and specified treatment date indicated on the consult.	Emergency Medicine	Maine Coast Memorial - Coastal Health Center	JOSEPH FIELD			Outpatient		Canceled		Canceled by Community Provider
VA000000714	Mercy Pain Center	04/30/2019	15:00	Initial outpatient evaluation for this episode of care	Cardiovascular Disease (Cardiology)	Mercy Pain Center	Mercy Pain Center			Outpatient		Canceled		Canceled by Patient

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**.

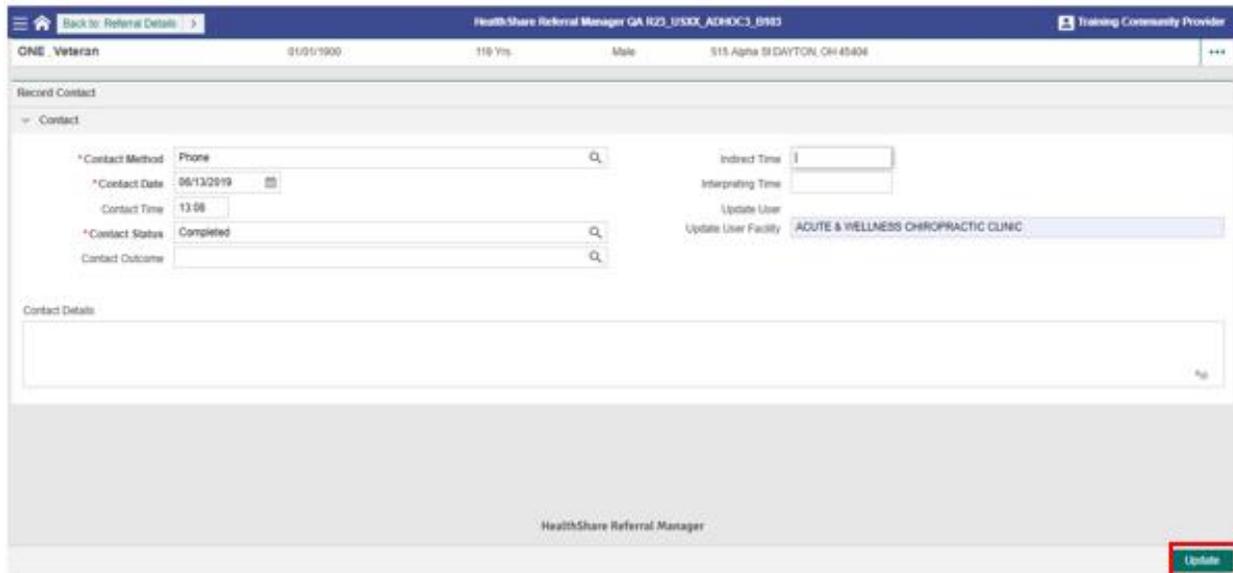
3. Click the **Action Menu** icon **...** (also called link referral list action menu by screen readers) on the **Patient Banner**.
4. Select **Record Contact** from the drop-down menu. The **Record Contact** screen appears.

Figure 25: Action Menu – Record Contact



5. Enter the relevant information regarding the contact and click the **Update** button **Update** 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. Click 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, STUDIES

3. The **Additional Referral Information** screen appears, showing **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Notes**, and **Patient Letters** related to the referral. Click on 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

- **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.

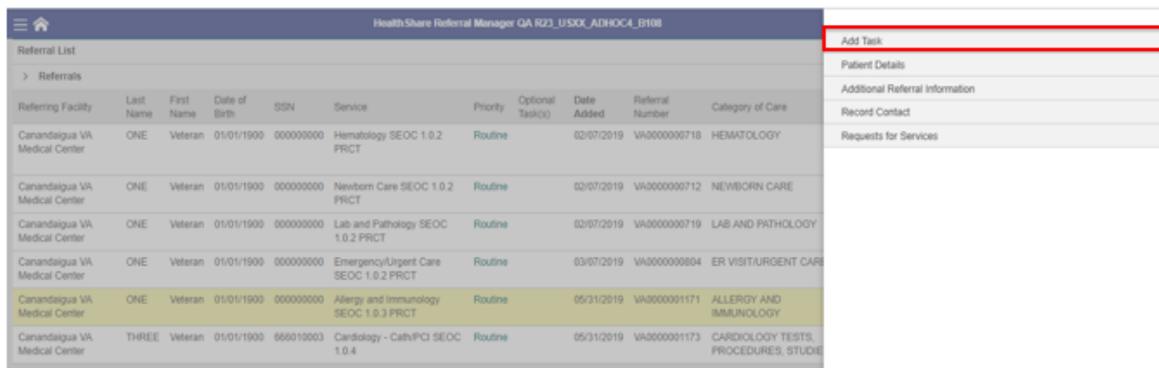
For example, a community provider will receive an auto-generated task from VA to submit medical documentation seven days after the referral status is changed to **Initial Care Given**. Alternatively, the community provider can create a manual task to communicate with VA; for example, to request VA to 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. Click 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** show 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 and can be edited.

Figure 30: Task Edit Screen

5. Click the **Magnifying Glass** icon  (also called lookup graphic by screen readers) within each field to view and select available options.
6. Click 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. Click the **Menu** icon  and select **Task List** from the drop-down options.

Figure 31: Menu – Task List

SSN	Service	Priority	Optional Suffix	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
800-00000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
800-00000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
800-00000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
800-00000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
800-00000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/01/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
800-00001000	Cardiology - CathPCI SEOC 1.0.4	Routine		05/01/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

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

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
04/20/2020	04/21/2020	VA00000000312	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY IMAGING	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/20/2020	04/23/2020	VA00000000323	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY TESTS, PROCEDURES, STUDIES	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/21/2020	04/24/2020	VA00000000003	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	NEUROLOGY	ONE	Veteran	Female	07/05/1997	<input type="checkbox"/>	Please add documenta...

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

Figure 33: Task Edit Screen

Task Edit

* Task Item: New Appointment Scheduled

* Priority: Normal

* Status: Pending

Due Date: 03/13/2019

* Start Date: 03/13/2019

Assign Task to User: [Search]

Assigned To User: [Search]

Assign Task to Group: [Search]

Assigned Facility: ACUTE & WELLNESS CHIROPRACTIC CLINIC

Comments: Please add documentation after providing the Diagnostic images as clinically required

HealthShare Referral Manager

Accept Task

7. Click the **Update** button 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
04/20/2020	04/21/2020	VA00000000312	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY IMAGING	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/20/2020	04/23/2020	VA00000000323	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY TESTS, PROCEDURES, STUDIES	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/21/2020	04/24/2020	VA00000000003	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	NEUROLOGY	ONE	Veteran	Female	07/05/1997	<input type="checkbox"/>	Please add documenta...

- 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

- 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:

- Click the **Menu** icon and select the **Task List** option.

Figure 36: Menu – Task List

SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appl Date
880 00000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000118	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
880 00000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000112	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
880 00000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
880 00000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
880 00000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
880 00001000	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

- Locate the task on the **Task List**.
- Check 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
04/20/2020	04/21/2020	VA0000000312	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY IMAGING	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/20/2020	04/23/2020	VA0000000323	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	CARDIOLOGY TESTS, PROCEDURES, STUDIES	ONE	Veteran	Female	10/22/1978	<input type="checkbox"/>	Please add documenta...
04/21/2020	04/24/2020	VA0000000003	New Appointment Scheduled	Pending	Basic			ABCM REHAB CTRS OF IND EAST CAMPUS	NEUROLOGY	ONE	Veteran	Female	07/05/1997	<input type="checkbox"/>	Please add documenta...

4.11. Canned Text

Canned text automatically populates text fields with predefined text items. Clicking the **Canned Text** icon 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 click 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. Click the **Update** button 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	Users Allowed to Run Report
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 provides community providers with a list of referrals received from VA during a specified period.	<ul style="list-style-type: none"> • VA Facility Community Care Staff • Community Providers
Download Request for Services (RFS) Form	This paper RFS form can be submitted until the electronic RFS form is available and may be uploaded into HSRM.	<ul style="list-style-type: none"> • VA Facility Community Care Staff • Community Providers

Report Type	Description	Users Allowed to Run Report
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.	<ul style="list-style-type: none"> VA Facility Community Care Staff Community Providers
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.	<ul style="list-style-type: none"> VA Facility Community Care Staff Community Providers

To run a report:

1. Click the **Menu** icon , 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 click the **Preview** icon 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, click the **Print** icon. To print from Internet Explorer, click the **Print File** icon.

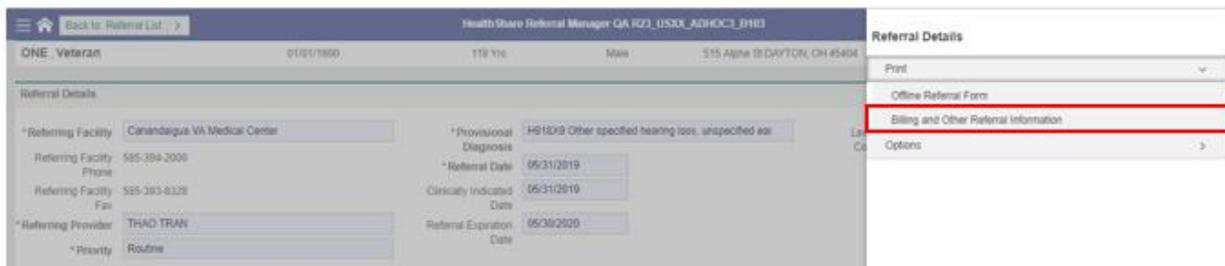
4.13. Billing and Other Referral Information

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. The information sheet also contains links to other community provider resources, including the Community Provider Toolkit, the precertification website, the electronic data interchange (EDI) claims submission clearinghouse, and the Vendor Inquiry System (status of claims). 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, click 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

Billing and Other Referral Information	VA0000000804	Page 1 of 1
Billing and Other Referral Information	VA 	U.S. Department of Veterans Affairs
Referral Number: VA0000000804 Referring VA Facility: Canandaigua VA Medical Center		
Any claim related to this episode of care MUST INCLUDE THE APPROVED REFERRAL NUMBER as the Referral Number or Prior Authorization Number.		
Billing Remarks This approved referral was authorized under Title 38 U.S.C. 1725, Veterans Millennium Healthcare and Benefits Act. VA payment will be the lesser of the amount for which the Veteran is personally liable or 70 percent of the applicable Medicare fee schedule amount, excluding copayment, cost share or deductible associated with their OHI. VA is prohibited from reimbursing Veteran OHI member liabilities such as copayments, cost shares or deductibles. For complete information about VHA's billing requirements, please visit https://www.va.gov/COMMUNITYCARE/providers/info_claimFiling.asp and follow the instructions on the site.		
Status of Claims To check on the status of your claims, please visit https://www.vis.fsc.va.gov/ and follow the instructions on the site.		

5. Additional Resources

Contact the HSRM Help Desk for support. Open a ticket by phone at 1-844-293-2272 (TTY: 1-512-326-6638) or email hsrmsupport@va.gov.

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

- [VA Community Care Website](#)
- [Community Care 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
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
TPA	Third-Party Administrator
VA	U.S. Department of Veterans Affairs
VAMC	Veterans Affairs Medical Center
VCA	Veterans Care Agreement
VISN	Veterans Integrated Service Network