## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>08/11/2017</td>
<td>CCRA Training Team</td>
<td>First version of HealthShare Referral Manager Participant Manual for User Functionality Testing</td>
</tr>
<tr>
<td>1.1</td>
<td>09/15/2017</td>
<td>CCRA Training Team</td>
<td>Updates include:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Morgan Byrd</td>
<td>• Updated all screenshots based on new system release</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated Figure 1 Referral Lifecycle Model</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated Table 1 to correspond to new Figure 1 graphic</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated Workflow 1 to correspond to new Figure 1 graphic</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated Workflows 4, 5, and 6 to correspond to new Figure 1 graphic</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added exporting function to section 5.0 C View Analytics</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added section 5.0 D Run Reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added section 6.1 Sort the Referral List</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added section 6.3 Tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added section 6.4 Record Patient Contact</td>
</tr>
<tr>
<td>2.0</td>
<td>09/16/2017</td>
<td>Susan Burke</td>
<td>Quality Manager Review</td>
</tr>
<tr>
<td>Version</td>
<td>Date</td>
<td>Author</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>------------</td>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 2.1     | 01/24/2018 | Lauren Shaman, Justin Gaines | Update  
  - TOC: Updated table of contents, table of figures, and table of tables  
  - Throughout document: Changed Helpful Tips to Notes  
  - Added language to reflect and highlight the benefits of HSRM in section 1.0  
  - Added additional user roles to the HSRM user roles table/spelled out acronyms in section 2.0  
  - Updated the HSRM referral lifecycle model to align to user roles/responsibilities in HSRM in section 3.0  
  - Added section 4.0 HSRM Essentials  
  - Added section 5.0 Locate a Referral  
  - Added section 6.0 Sort a List  
  - Added section 7.0 Manage Tasks  
  - Added section 8.0 Referral Details  
  - Added section 9.0 Add Documents  
  - Added section 10.0 Record Patient Contact  
  - Added section 11.0 Allocate Referral to a Community Care Provider/Facility  
  - Added section 12.0 Accept/Reject Referral  
  - Added section 13.0 Manage Appointments  
  - Added section 14.0 Indicate Care Given  
  - Added section 15.0 Access an Audit Trail  
  - Added section 16.0 Reporting and Analytics |
| 2.2     | 01/18/2018 | Adine Hoffman        | Peer Review  
  - Updated version number on title page  
  - Throughout document:  
    o Made minor changes to language and grammar  
    o Applied appropriate text styles  
    o Changed CC to community care where appropriate  
    o Changed HSRM to HealthShare Referral Manager  
    o Clarified alt text  
  - Updated content to match mandatory intro text in section 1.2  
  - Added a table of acronyms and abbreviations in Appendix A |
| 2.3     | 01/20/2018 | Rachael Novalis      | Manager Review |
| 2.4     | 01/30/2018 | Sam Weaver           | QC Review  
  - Updated version number on title page  
  - Throughout document:  
    o Made minor changes to language and grammar  
    o Applied appropriate text styles  
    o Changed CC to community care where appropriate  
    o Changed HSRM to HealthShare Referral Manager  
    o Clarified alt text  
  - Updated content to match mandatory intro text in section 1.2  
  - Added a table of acronyms and abbreviations in Appendix A |
<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.5</td>
<td>02/05/2018</td>
<td>Susan Burke</td>
<td>Deputy Project Manager Review</td>
</tr>
</tbody>
</table>
| 2.6     | 03/05/2018 | Justin Gaines   | • Updated table of contents, table of figures, and table of tables  
• Change language throughout document to reflect new procedures and processes  
• Updated the HealthShare Referral Manager lifecycle diagram  
• Updated Table 1.0 with new lifecycle process and statuses  
• Added section 4.0 HealthShare Referral Manager Account Request  
• Added section 5.0 HealthShare Referral Manager Access  
• Added language for lock icon in section 6.1  
• Added language for logout button in section 6.1  
• Added section 7.0 Eligibility Form  
• Added section 9.0 Offline Referral Form  
• Added section 10.0 Assign a Referral to a User  
• Added section 11.7 Automated Task  
• Added section 18.1 Reject a Referral  
• Added section 19.0 Close Referral  
• Added section 22.0 Provision Users |
| 2.7     | 03/08/2018 | Zainab Ashraf   | Peer Review                                                                                                                                 |
| 2.8     | 03/12/2018 | Rachael Novalis | Training Lead Review                                                                                                                                     |
| 2.9     | 03/14/2018 | Sheila Petaccio | Project Manager Review                                                                                                                                   |
| 2.10    | 03/15/2018 | Morgan Byrd     | 508 Review                                                                                                                                 |
| 2.11    | 03/19/2018 | Sam Weaver      | QC Review  
• Throughout doc:  
  o Made minor changes to language and grammar  
  o Changed HealthShare Referral Manager to HSRM where appropriate  
  o Made “Community Care” and “Community Provider” lowercase where appropriate  
• Appendix A: Updated table of acronyms |
<p>| 3.0     | 03/20/2018 | Susan Burke     | DPM Review                                                                                                                                         |</p>
<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
</table>
| 3.1     | 03/28/2018 | Justin Gaines    | Updated based on MR12 Release  
- Added Section 14.1.1 View Additional SEOC Information  
- Added Section 19.1.1 Add a Provider to an Appointment  
- Updated Section 2.1 The Lifecycle Referral Diagram  
Updated the figure numbers |
| 3.2     | 03/28/2018 | Rachael Novalis  | Training Lead Review                                                         |
| 3.3     | 03/29/2018 | Aamir Syed       | Project Manager Review                                                       |
| 3.4     | 03/30/2018 | Morgan Byrd      | 508 Review  
- Checked for alt text  
- Added header rows for each table  
- Checked heading structure |
| 3.5     | 04/02/2018 | Sam Weaver       | QC Review  
- Title page and footer: Updated month  
- Throughout doc:  
  - Made minor changes to language and grammar  
  - Added and corrected alt text for images  
  - Corrected errors in image captions  
- Section 1.1: Updated intro text  
- Section 11: Added spell out for SEOC  
- Appendix A: Updated table of acronyms |
| 4.0     | 04/03/2018 | Susan Burke      | DPM Review  
- Updated Section 2.1 The Lifecycle Referral Diagram  
- Added Section 14.1.2 View Additional SEOC Information from the Referral Details Screen  
- Added Section 19.2 Record an Appointment from the Component Menu icon  
- Changed language to section 13.7 Automated Task to read (25 days of the status being changed to Initial Care Given or 25 days after the earliest appointment)  
- Updated screen shots to reflect interface updates  
- Updated figure numbers, table of contents |
| 5.0     | 06/25/2018 | Justin Gaines    | Updated Section 2.1 The Lifecycle Referral Diagram  
- Added Section 14.1.2 View Additional SEOC Information from the Referral Details Screen  
- Added Section 19.2 Record an Appointment from the Component Menu icon  
- Changed language to section 13.7 Automated Task to read (25 days of the status being changed to Initial Care Given or 25 days after the earliest appointment)  
- Updated screen shots to reflect interface updates  
- Updated figure numbers, table of contents |
<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>06/29/2018</td>
<td>Sam Weaver</td>
<td>QC Review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Throughout doc:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Made minor changes to language and grammar</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Corrected figure numbers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Section 1.1: Updated intro text</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Section 9.2: Deleted duplicate step (no. 7)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Appendix A: Updated table of acronyms</td>
</tr>
<tr>
<td>6.0</td>
<td>07/03/2018</td>
<td>Susan Burke</td>
<td>DPM Review</td>
</tr>
<tr>
<td>6.1</td>
<td>07/13/2018</td>
<td>Justin Gaines</td>
<td>• Throughout doc:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Updated hyperlinks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Added language to explain Priority, Status, and Appointment Hyperlinks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Made minor changes to language</td>
</tr>
<tr>
<td>6.2</td>
<td>07/13/2018</td>
<td>Rachael Novalis</td>
<td>Training Lead Review</td>
</tr>
<tr>
<td>6.3</td>
<td>07/16/2018</td>
<td>Sam Weaver</td>
<td>QC Review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Title page and footer: Updated version number</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Throughout doc:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Made minor changes to language and grammar</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>o Verified accuracy of hyperlinks</td>
</tr>
<tr>
<td>6.3</td>
<td>07/13/2018</td>
<td>Morgan Byrd</td>
<td>508 Review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Checked for alt text</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added header rows for each table</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Checked heading structure</td>
</tr>
<tr>
<td>6.4</td>
<td>07/20/2018</td>
<td>John Bingham</td>
<td>• Added section 12.1 “Generate Multiple Offline Referral Forms” and related screenshots</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added screenshot to section 20.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added new automated tasks to section 14.6</td>
</tr>
<tr>
<td>6.5</td>
<td>07/22/2018</td>
<td>Rachael Novalis</td>
<td>Training Lead Review</td>
</tr>
<tr>
<td>6.6</td>
<td>07/23/2018</td>
<td>John Bingham</td>
<td>• Added section 8 “View Other Health Insurance”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated figures, table of content</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added alt text</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added Appendix B “Document Type Definitions”</td>
</tr>
<tr>
<td>Version</td>
<td>Date</td>
<td>Author</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 6.7     | 08/07/2018 | Sam Weaver | QC Review  
• Title page and footer: Updated month and version number  
• Throughout doc:  
  o Made minor changes to language and grammar  
  o Verified links and updated them where necessary  
  o Reviewed alt text  
• Tables 3 and 4: Updated formatting for consistency  
• Appendix A: Updated table of acronyms  
• Appendix B: Inserted a page break so it starts on a new page |
| 7.0     | 8/10/2018  | Susan Burke| DPM Review                                                                                                                                  |
**Table of Contents**

1. **Introduction** ........................................................................................................ 14
   1.1. Project and Solution Overview .................................................................... 14
   1.2. HSRM Benefits ............................................................................................... 14
   1.3. User Guide Purpose ....................................................................................... 14

2. **User Guide Overview** ...................................................................................... 15
   2.1. HSRM Lifecycle Process ............................................................................ 15

3. **HSRM Users** .................................................................................................. 16

4. **HSRM Account Request** ............................................................................... 17

5. **HSRM Access** .................................................................................................. 17

6. **HSRM Essentials** ............................................................................................ 18
   6.1. HSRM Frame .................................................................................................. 18
   6.2. Patient Banner ................................................................................................ 19
   6.3. Breadcrumb Trail/Back Feature ..................................................................... 19
   6.4. Mandatory Fields ........................................................................................... 20
   6.5. HSRM Icons .................................................................................................. 20
   6.6. Canned Text .................................................................................................... 21
   6.7. Calendar Dates ................................................................................................ 22
   6.8. Search Rules ................................................................................................... 22
   6.9. Save Data ........................................................................................................ 22
   6.10. HSRM Keyboard Shortcuts ......................................................................... 23

7. **Receive a Referral** .......................................................................................... 25

8. **View Other Health Insurance (OHI)** .............................................................. 25

9. **View Eligibility Form** ..................................................................................... 26

10. **Locate a Referral** ............................................................................................ 28
    10.1. Find Referral by Patient ............................................................................. 28
    10.2. Find Referrals .............................................................................................. 30
    10.3. Referral List ................................................................................................. 32

11. **Locate a Provider** .......................................................................................... 33

12. **Assign a Referral to a Facility Community Care Staff Member** ............ 34

13. **Generate an Offline Referral Form** .................................................................. 35
    13.1. Generate Multiple Offline Referral Forms .............................................. 37
    13.2. Print an Offline Referral Form .................................................................... 39
    13.2.1. Print an Offline Referral Form in Chrome ........................................... 39
    13.2.2. Print an Offline Referral Form in Internet Explorer ............................ 40
    13.3. Download an Offline Referral Form .......................................................... 41
13.3.1. Download an Offline Referral Form in Chrome ................................. 42
13.3.2. Download an Offline Referral Form in Explorer ............................... 42

14. Sort a List .................................................................................................. 43

15. Manage Tasks ............................................................................................ 45
   15.1. View a Task List .................................................................................. 45
   15.2. Add a Task .......................................................................................... 45
         15.2.1. Add a Task from the Referral Details Screen ............................. 45
         15.2.2. Add a Task from the Referral List Screen ................................. 46
   15.3. Complete the Add Task Screen .......................................................... 47
   15.4. Assign a User to a Task ....................................................................... 48
   15.5. Complete a Task .................................................................................. 50
   15.6. Automated Tasks .................................................................................. 50

16. View Referral Details ............................................................................. 51
   16.1. View Additional Referral Information .................................................. 51

17. View SEOC Information ......................................................................... 53
   17.1. View Additional SEOC Information from the Patient Details Screen .... 53
   17.2. View Additional SEOC Information from the Referral Details Screen ... 54

18. Add Documents .......................................................................................... 55

19. Record Patient Contact ........................................................................... 58

20. Assign a Referral to a Community Provider/Facility .............................. 60

21. Accept a Referral ...................................................................................... 61
   21.1. Reject a Referral .................................................................................. 62

22. Manage Appointments ............................................................................ 64
   22.1. Record an Appointment ...................................................................... 64
         22.1.1. Add a Community Provider to an Appointment ......................... 65
         22.2. Record an Appointment from the Component Menu Icon ............ 66
         22.3. Cancel an Appointment ................................................................. 68

23. Indicate Initial Care Given ...................................................................... 69

24. Close a Referral ........................................................................................ 71

25. Access an Audit Trail ................................................................................ 72

26. Reports ...................................................................................................... 73
   26.1. Run a Report ....................................................................................... 73
   26.2. Print a Report ...................................................................................... 75
         26.2.1. Print a Report in Chrome ............................................................. 75
         26.2.2. Print a Report in Explorer ............................................................ 76
   26.3. Download a Report ............................................................................. 78
26.3.1. Download a Report in Chrome ................................................................. 78
26.3.2. Download a Report in Explorer ............................................................... 79

27. User Provisioning ......................................................................................... 80
   27.1. Access User Setup Tools ........................................................................ 80
   27.2. Search for Users ...................................................................................... 81
   27.3. Add Users .................................................................................................. 83
   27.4. Manage User Access and Security Profiles .............................................. 84
   27.5. Add Logon Locations ............................................................................... 85

28. Help Desk Support ....................................................................................... 86

Appendix A: Acronyms and Abbreviations .................................................... 87
Appendix B: Document Type Definitions ......................................................... 88

Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Referral Lifecycle Model</td>
<td>15</td>
</tr>
<tr>
<td>2</td>
<td>HSRM Frame – Open Profile, Menu, and Home Icons</td>
<td>18</td>
</tr>
<tr>
<td>3</td>
<td>Referral Details Screen – Patient Banner</td>
<td>19</td>
</tr>
<tr>
<td>4</td>
<td>Referral Details Screen – Breadcrumb Trail</td>
<td>20</td>
</tr>
<tr>
<td>5</td>
<td>Accept Task/Update Button Grayed Out</td>
<td>20</td>
</tr>
<tr>
<td>6</td>
<td>Referral Processing Information Section – Canned Text</td>
<td>22</td>
</tr>
<tr>
<td>7</td>
<td>Consult Toolbox – Send to HSRM for Referral</td>
<td>25</td>
</tr>
<tr>
<td>8</td>
<td>Action Menu Icon</td>
<td>26</td>
</tr>
<tr>
<td>9</td>
<td>Referral Details Screen – Action Menu List</td>
<td>26</td>
</tr>
<tr>
<td>10</td>
<td>Other Health Insurance Screen</td>
<td>26</td>
</tr>
<tr>
<td>11</td>
<td>Referral List – Action Menu Icon</td>
<td>27</td>
</tr>
<tr>
<td>12</td>
<td>Referral List – Menu List</td>
<td>27</td>
</tr>
<tr>
<td>13</td>
<td>Eligibility Form</td>
<td>28</td>
</tr>
<tr>
<td>14</td>
<td>Menu Options – Find Referral by Patient</td>
<td>29</td>
</tr>
<tr>
<td>15</td>
<td>Patient Search Screen – Find Button</td>
<td>30</td>
</tr>
<tr>
<td>16</td>
<td>Referral List Screen – Find Referrals</td>
<td>31</td>
</tr>
<tr>
<td>17</td>
<td>Inquiry Selection Screen</td>
<td>32</td>
</tr>
<tr>
<td>18</td>
<td>Find Provider – Menu List</td>
<td>33</td>
</tr>
<tr>
<td>19</td>
<td>Provider Search Screen</td>
<td>34</td>
</tr>
<tr>
<td>20</td>
<td>Main Details Screen</td>
<td>34</td>
</tr>
<tr>
<td>21</td>
<td>Referral Details Screen – Assigned User</td>
<td>35</td>
</tr>
<tr>
<td>22</td>
<td>Referral Details Screen – Component Menu Icon</td>
<td>36</td>
</tr>
<tr>
<td>23</td>
<td>Referral Details Screen – Offline Referral Form</td>
<td>36</td>
</tr>
<tr>
<td>24</td>
<td>Offline Referral Form</td>
<td>37</td>
</tr>
<tr>
<td>25</td>
<td>Referral List Screen – Multiple Offline Referral Form Checkbox</td>
<td>37</td>
</tr>
<tr>
<td>26</td>
<td>Referral List Screen – Component Menu</td>
<td>38</td>
</tr>
<tr>
<td>27</td>
<td>Referral List Screen – Component Menu</td>
<td>38</td>
</tr>
<tr>
<td>28</td>
<td>Multiple Offline Referral Forms Document</td>
<td>39</td>
</tr>
</tbody>
</table>
**Table of Tables**

<table>
<thead>
<tr>
<th>Table</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 1: Referral Lifecycle Steps</td>
<td>15</td>
</tr>
<tr>
<td>Table 2: User Roles</td>
<td>17</td>
</tr>
<tr>
<td>Table 3: Windows Operating System (OS) Shortcut Keys</td>
<td>23</td>
</tr>
<tr>
<td>Table 4: Mac OS Shortcut Keys</td>
<td>24</td>
</tr>
<tr>
<td>Table 5: Acronyms and Abbreviations</td>
<td>87</td>
</tr>
<tr>
<td>Table 6: Document Type Definitions</td>
<td>88</td>
</tr>
</tbody>
</table>
1. Introduction

1.1. Project and Solution Overview

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

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

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

1.2. HSRM Benefits

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

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

1.3. User Guide Purpose

This User Guide is a detailed, step-by-step reference for HSRM end users to:
• Understand the overall HSRM scope, benefits, and purpose
• Become oriented to HSRM processes and roles
• Gain role-based instruction on HSRM functionality

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

2. User Guide Overview

2.1. HSRM Lifecycle Process

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

Figure 1: Referral Lifecycle Model

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

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

Table 1: Referral Lifecycle Steps

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

Table 1: Referral Lifecycle Steps

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Responsible Party</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Receive a Referral</td>
<td>System</td>
<td>HSRM receives the referral from the Computerized Patient Record System (CPRS).</td>
<td>Approved (System Status)</td>
</tr>
<tr>
<td>2</td>
<td>Assign Referral to a Community Provider/Facility</td>
<td>Community Care Staff Member</td>
<td>The referral is reviewed and assigned to a community provider/facility by a facility community care staff member.</td>
<td>Sent (Automatic Change)</td>
</tr>
<tr>
<td>#</td>
<td>Title</td>
<td>Responsible Party</td>
<td>Description</td>
<td>Status</td>
</tr>
<tr>
<td>----</td>
<td>--------------------------------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>3</td>
<td>Accept a Referral</td>
<td>Community Provider/ Facility</td>
<td>A community provider staff member at the community provider/facility or the facility community care staff member accepts or rejects the referral.</td>
<td>Accepted or Rejected (Manual Change)</td>
</tr>
<tr>
<td></td>
<td>Reject a Referral</td>
<td>Community Care Staff Member</td>
<td>Note: If the referral is rejected, it is sent back to VA to be reassigned.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Record an Appointment</td>
<td>Community Provider/ Facility</td>
<td>The community provider/facility schedules the Veteran's appointment in an external system, and the community provider/facility or the facility community care staff member records the appointment in HSRM.</td>
<td>First Appointment Made (Automatic Change)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Community Care Staff Member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Follow Up on Appointment</td>
<td>Community Provider/ Facility</td>
<td>Once the first appointment is completed, the community provider/facility or the facility community care staff member enters information regarding the appointment, including treatment notes and uploads medical documentation in HSRM.</td>
<td>Initial Care Given (Manual Change)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Community Care Staff Member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Medical Documentation Received</td>
<td>Facility Community Care Staff</td>
<td>After the Veteran has received all documented care and all medical documentation has been received, the facility community care staff reviews all medical documentation to ensure that the episode of care is completed, and all documentation was received.</td>
<td>Closed (Manual Change)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Member</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. HSRM Users

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

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

4. HSRM Account Request

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

5. HSRM Access

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

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

6.1. HSRM Frame

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

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

- **Open Profile Panel** icon

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

- **Lock** icon

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

- **Logout** button

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

- **Menu** icon

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

- **Home** icon

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

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

Figure 3: Referral Details Screen – Patient Banner

6.3. Breadcrumb Trail/Back Feature

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

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

Figure 5: Accept Task/Update Button Grayed Out

6.5. HSRM Icons

This section describes all HSRM icons.

- **Action Menu**

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

- **Ascending**

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

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

- **Canned Text**

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

- **Component Menu**

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

- **Descending**

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

- **Download**

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

- **Record Appointment**

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

- **Magnifying Glass**

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

- **Print Preview**

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

- **Save As**

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

### 6.6. Canned Text

Canned Text automatically populates text fields with predefined text string items. Canned Text functionally is available for most multi-lined text fields. Clicking the
**Canned Text** icon will display existing items in the canned text library. The following Canned Text shortcuts are available:

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

*Figure 6: Referral Processing Information Section – Canned Text*

### 6.7. Calendar Dates

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

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

### 6.8. Search Rules

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

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

### 6.9. Save Data

Use the following save methods to save data in HSRM:

- **Apply** button: Saves data within fields and remains on the current screen
• **Update** button: Saves data within fields and returns to the previous screen

### 6.10. HSRM Keyboard Shortcuts

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

**Table 3: Windows Operating System (OS) Shortcut Keys**

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

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

### Table 4: Mac OS Shortcut Keys

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

<table>
<thead>
<tr>
<th>Elements</th>
<th>Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fn + Arrow Up/Down when in List Row</td>
<td>Navigation of List Pages</td>
</tr>
<tr>
<td>Up/Down Arrows when in lookup</td>
<td>Navigation of Lookup</td>
</tr>
<tr>
<td>Fn + Arrow Up/Down when in lookup</td>
<td>Navigation of Lookup Pages</td>
</tr>
<tr>
<td>Tab</td>
<td>Navigate Forward for Fields</td>
</tr>
<tr>
<td>Shift + Tab</td>
<td>Navigate Backward for Fields</td>
</tr>
<tr>
<td>Spacebar or Enter</td>
<td>Use to Tick or Untick a Checkbox when in that Field</td>
</tr>
</tbody>
</table>

### 7. Receive a Referral

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

**Figure 7: Consult Toolbox – Send to HSRM for Referral**

### 8. View Other Health Insurance (OHI)

The **Other Heath Insurance** screen displays insurance information for a Veteran.
To view the **Other Health Insurance** screen:

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

**Figure 8: Action Menu Icon**

![Action Menu Icon](image)

**Figure 9: Referral Details Screen – Action Menu List**

![Referral Details Screen](image)

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

**Figure 10: Other Health Insurance Screen**

![Other Health Insurance Screen](image)

---

### 9. View Eligibility Form

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

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

**Figure 11: Referral List – Action Menu Icon**

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

**Figure 12: Referral List – Menu List**
10. Locate a Referral

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

- **Find Referral by Patient** (not available to community providers)
- **Find Referrals** (not available to community providers)
- **Referral List**

10.1. Find Referral by Patient

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

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

   *Note: Menu options are based on user security rights.*
2. Select **Find Referral by Patient** from the drop-down options to navigate to the **Patient Search** screen.

3. Enter search criteria in any field on the **Patient Search** screen.

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

4. Click the **Find** button at the bottom right of the screen to view the list of Veterans who match the search. The resulting **Referral List** screen lists referrals that match the search criteria.
5. Locate the Veteran by sorting the list if multiple Veterans are listed (e.g., Last Name, First Name).

6. Click the row of the patient to view the Veteran’s referral list.

7. Click the row of the referral to view the referral details.

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

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

10.2. Find Referrals

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

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

   Note: Menu options are based on user security rights.

2. Select Find Referrals from the drop-down options to navigate to the Inquiry Selection screen.
3. Enter information in any field within the **Inquiry Selection** screen.

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

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

   **Notes:**
   
   - *When values are entered for more than one field, HSRM looks for records that match all fields. There is no “or” search available.*
   
   - *The search is case-insensitive (e.g., there is no difference between Smith, smith, and SMITH).*
   
   - *The search looks for numbers matching, or starting with, the value entered (e.g., entering 325 will return 325-000, but not 000-325).*
5. Locate the referral by sorting the list if multiple Veterans are listed (e.g., Last Name, First Name).

6. Click the row of the patient to view the Veteran’s referral list.

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

   ![Figure 17: Inquiry Selection Screen](image)

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

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

10.3. Referral List

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

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

   **Note:** Menu options are based on user security rights.

2. Select **Referral List** from the drop-down options to navigate to the **Referral List** screen.

3. Locate the referral by **sorting the list** (e.g., Last Name, First Name).
4. Click the row of the referral to view the Referral Details screen.

   Note: The information within the Priority, Status, and Appointment columns are hyperlinks. These columns do not navigate to the Referral Details screen.
   - Click the Priority hyperlink to view historical changes to the priority of the referral.
   - Click the Status hyperlink to view historical changes to the status of the referral.
   - Click the Appointment hyperlinks to record and edit appointments.

11. Locate a Provider

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

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

   Figure 18: Find Provider – Menu List

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

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

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

2. Navigate to the Referral Processing Information section and click the Magnifying Glass icon to select a user.

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

**Figure 21: Referral Details Screen – Assigned User**

---

13. Generate an Offline Referral Form

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

To generate an Offline Referral Form:

1. Locate the referral and navigate to the Referral Details screen.

2. Click the Component Menu icon, displayed as the vertical three-dot ellipsis on the right side of the Referral Details header, below the Patient Banner.
3. Click the down arrow to expand the print section and select **Offline Referral Form**. The **Offline Referral Form** appears in a new browser tab.
13.1. Generate Multiple Offline Referral Forms

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

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

2. Click the Toggle Multiple Selection checkbox (at the top right) to enable the option to select multiple referrals.
3. Click the checkboxes next to the referrals for which you want to generate offline referral forms, then click the **Component Menu** icon.

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

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

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

13.2.1. Print an Offline Referral Form in Chrome

1. Navigate to the Offline Referral Form.
2. Click the Print icon in the top right of the Offline Referral Form. The Print window appears.
3. Select print preferences from the print options listed.

4. Click the Print button.

13.2.2. Print an Offline Referral Form in Internet Explorer

1. Navigate to the Offline Referral Form.

2. Click the Print File icon on the bottom of the Offline Referral Form. The Print window appears.
3. Select print preferences from the print options listed.
4. Click the **Print** button.

**13.3. Download an Offline Referral Form**

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

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

**Figure 33: Offline Referral Form in Chrome – Download Icon**

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

**Figure 34: Save As Window in Chrome – Save Button**

13.3.2. Download an Offline Referral Form in Explorer

1. Click the **Save a Copy** icon on the bottom of the **Offline Referral Form**. The **Save As** window appears.
2. Input a file name and click the **Save** button.

14. Sort a List

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

To conduct an advanced sort:

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

Figure 37: Referral List Screen – Status

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

Figure 38: Referral List Screen – Sorting Options

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

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

15.1. View a Task List

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

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

Figure 39: Referral List Screen – Task List

15.2. Add a Task

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

15.2.1. Add a Task from the Referral Details Screen

1. Locate the referral and navigate to the Referral Details screen.
2. Click the Action Menu icon in the top right of the Patient Banner to access the Action Menu drop-down list.
3. Select **Add Task** from the drop-down menu. The **Task Edit** screen appears.

4. Complete the **Task Edit** screen.

15.2.2. **Add a Task from the Referral List Screen**

   1. **Locate the referral** and navigate to the **Referral List** screen.
   2. Click the **Action Menu** icon to the right of the referral row.
3. Select **Add Task** from the drop-down menu. The **Task Edit** screen appears.

4. Complete the **Add Task** screen.

### 15.3. Complete the Add Task Screen

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

1. **Navigate to the Add Task screen**.

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

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

---

3. Click the **Update** button at the bottom right of the screen to save the task.
15.4. Assign a User to a Task

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

1. Navigate to the Task List.

Figure 46: Referral List Screen – Task List

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

   ![Task Edit Screen](image)

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

   **Note:** Information within the Priority, Status, and Appointment columns are hyperlinks.
3. Click the **Magnifying Glass** icon and select a user from the list to assign the task to a user.

   ![Figure 47: Task List Screen – Task: Add Documentation](image)

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

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

   ![Figure 48: Task Edit Screen – Assign Task and Update Button](image)
15.5. Complete a Task

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

1. Navigate to the Task List.
2. Check the box within the Completed column of the corresponding task.

Figure 49: Task List Screen – Completed Checkbox

15.6. Automated Tasks

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

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

16. View Referral Details

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

Figure 50: Referral Details Screen – Processing and Treatment Details

16.1. View Additional Referral Information

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

- Patient Contacts
- Appointments
- Documents
- Referral Notes

To view additional referral information:

1. Locate the referral.
2. Select the referral from the Referral List.
3. Select the Action Menu icon to the right of the corresponding referral row.
4. Select **Additional Referral Information** from the drop-down menu. The **Additional Referral Information** screen appears.

**Figure 52: Referral List – Action Menu List**

**Figure 53: Additional Referral Information Screen**
17. View SEOC Information

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

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

17.1. View Additional SEOC Information from the Patient Details Screen

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

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

Figure 54: Patient Banner – Action Menu

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

Figure 55: Menu List – Patient Details

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

**Figure 57: SEOC List – Preauthorization Details**

**Figure 58: List of SEOC Services**

### 17.2. View Additional SEOC Information from the Referral Details Screen

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

2. Click the SEOC Details link in the **Services Requested** section to view the SEOC list.

   **Figure 59: Referral Details Screen – SEOC Details Link**

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

   **Figure 60: SEOC Services Screen**

---

### 18. Add Documents

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

1. **Locate the referral.**

2. Click the **Add Documents to Referral** link to open the **Documents** screen. Facility community care staff can locate the link in the **Referral Details** section; community providers can locate the link in the **Treatment Information** section on the **Referral Details** screen.

**Figure 61: Referral Details Screen – Add Documents**

3. Click the **New** button at the bottom of the **Documents** screen. The **New Scan** screen appears.
4. Enter data in the corresponding fields on the **New Scan** screen.

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

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

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

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

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

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

**Figure 64: Documents List Screen – Back to Referral Details**

19. **Record Patient Contact**

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

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

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

5. Enter the patient contact information.

6. Click the **Update** button at the bottom right of the screen to save changes.
20. Assign a Referral to a Community Provider/Facility

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

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

**Note:** The **Network** field defaults to Not Allocated.
3. Navigate to the **Community Provider/Facility Information** section on the **Referral Details** screen. Click the **Magnifying Glass** icon and select a community care provider/facility and/or a provider from the list.

![Referral Details Screen – Network Field](image)

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

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

![Referral Details Screen – Community Provider/Facility Field](image)

21. Accept a Referral

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

1. **Locate the referral**.

2. Navigate to the **Referral Processing Information** section and click the **Magnifying Glass** icon to change the status to Accepted.

![Referral Details Screen – Network Field](image)

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

3. Click the **Update** button at the bottom right of the screen to save changes.
21.1. Reject a Referral

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

1. Locate the referral.

2. Navigate to the Referral Processing Information section and click the Magnifying Glass icon to change the status to Rejected. When the status of Rejected is chosen, the Referral Return Reason field becomes mandatory.

3. Click the Magnifying Glass icon and select a Referral Return Reason.
4. Click the **Update** button at the bottom right of the screen to save changes.

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

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

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

22.1. Record an Appointment

1. Locate the referral.
2. Click the **Record Appointment** icon in the row of the corresponding referral. The **Record Appointment** screen appears.

   ![Referral List – Appointment Edits](image)

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

Notes:
- Time is saved as military time but can be entered either in military time or in 12-hour format (e.g., 2 p.m. automatically updates to 14:00).
- The **Service Requested** field is auto-populated from the referral and cannot be edited.
Note: Once the first appointment is recorded, the referral status automatically changes to First Appointment Made. Appointments can be recorded in the same manner, but the referral status will only change to First Appointment Made when the first appointment is recorded.

22.1.1. Add a Community Provider to an Appointment

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

1. Click the Provider Search link on the Record Appointment screen.
2. Enter the search criteria in the community provider search fields.

3. Click the **Find** button.

**Figure 78: Provider Search Screen – Specialty and Last Name**

4. Select the provider to be added to the appointment; the **Record Appointment** screen appears with the community provider added provider.

5. Click the **Update** button to add the community provider to the appointment.

**Figure 79: Record Appointment Screen**

---

22.2. Record an Appointment from the Component Menu Icon

1. **Locate a referral.**

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

**Figure 80: Referral Details Screen – Component Icon**

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

**Figure 81: Referral Details Screen – Record Appointment**

5. Record the appointment details in the appointment fields.

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

**Figure 82: Record Appointment Screen – Update**
22.3. Cancel an Appointment

1. **Locate the referral** on the **Referral List**.

2. Click the **Appointment Date** link for the referral. The **Appointment Information** screen appears.

**Figure 83: Record Appointment Screen – Date**

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

**Figure 84: Record Appointment Screen – Change Status**

4. Click the **Magnifying Glass** icon in the **Change Status To** field and select **Cancelled** from the drop-down list.

5. Click the **Magnifying Glass** icon in the **Reason for Cancellation** field and select the appropriate reason for cancellation from the available options.

6. Enter any additional information regarding the appointment cancellation.

7. Click the **Update** button at the bottom right of the screen to save changes.
23. Indicate Initial Care Given

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

1. **Locate the referral.**

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

4. Enter any relevant treatment notes regarding the appointment within the Treatment Notes field of the Treatment Information section.

5. Click the Update button at the bottom right of the screen to save changes.
24. Close a Referral

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

1. Locate the referral.
2. Navigate to the Referral Processing Information section and click the Magnifying Glass icon to change the status to Closed.
3. Click the Update button at the bottom right of the screen to save changes.
25. Access an Audit Trail

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

1. Locate the referral.
2. Navigate to the Referrals Details screen.
3. Navigate to the Referral Processing Information section and click the Audit Trail link.

**Figure 91: Referral Processing Information Section – Audit Trail**

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

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

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

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

26.1. Run a Report

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

1. Click the Menu icon in the top left of the screen to view the menu options available.
2. Select Reports from the drop-down options and choose the desired report.
3. Select the criteria to be used to run the report from the fields available.

4. Click the **Print Preview** icon to run the report.

5. Navigate to the new browser tab that displays the report.
26.2. Print a Report

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

26.2.1. Print a Report in Chrome

1. Run any report.
2. Click the Print icon in the top right of the report. The Print screen appears.
3. Select print preferences from the print options listed.

4. Click the **Print** button.

**Figure 98: Print Screen in Chrome – Print Button**

### 26.2.2. Print a Report in Explorer

1. **Run any report.**
2. Click the **Print File** icon on the bottom of the report. The **Print** window appears.
3. Select print preferences from the print options listed.

4. Click the **Print** button.

---

**Figure 100: Print Screen in Explorer – Print Button**
26.3. Download a Report

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

26.3.1. Download a Report in Chrome

1. Run any report.
2. Click the Download icon in the top right of the report. The Save As window appears.

Figure 101: Report in Chrome – Download Icon

3. Input a file name and click the Save button.
26.3.2. Download a Report in Explorer

1. Run any report.

2. Click the **Save As** icon on the bottom of the report. The **Save As** window appears.

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

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

27.1. Access User Setup Tools

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

2. Select **Tools** from the drop-down menu to expand the **Tools** list and select **User Setup**. The **User Setup** screen appears.
27.2. Search for Users

1. Navigate to the User Setup screen.
2. Click the Magnifying Glass icon within each User Setup field to view available options.
3. Enter the search criteria in the User Setup fields.
4. Click the Find button at the bottom right of the screen.
5. Results appear in the table list.

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

1. Navigate to the User Setup screen.

2. Click the New button at the bottom right of the screen.

3. Enter the logon details in the mandatory fields, which are denoted by a red asterisk.

4. Click the Magnifying Glass icon within each Logon Details field to view available options and select the appropriate option.

5. Click the Apply button at the bottom right of the screen.
27.4. Manage User Access and Security Profiles

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

3. Select the **Security Group** and **Access Profile**.
4. Click the **Apply** button.
27.5. Add Logon Locations

1. **Search for the user.**
2. Check the **Allow Change of Location at Logon** box.

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

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

How to open a ticket with Enterprise Service Desk (ESD)
- By phone at 1-855-673-4357 (TTY: 1-844-224-6186)
- Or, by utilizing self-service at https://yourit@va.gov

Some things to keep in mind
- The ESD sets priorities for tickets
- Password resets cannot be achieved via self-service; users must contact the service desk by phone
Appendix A: Acronyms and Abbreviations

Table 5: Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Acronym or Abbreviation</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCRA</td>
<td>Community Care Referral and Authorization</td>
</tr>
<tr>
<td>CPRS</td>
<td>Computerized Patient Records System</td>
</tr>
<tr>
<td>HSRM</td>
<td>HealthShare Referral Manager</td>
</tr>
<tr>
<td>OHI</td>
<td>Other Health Insurance</td>
</tr>
<tr>
<td>OS</td>
<td>Operating System</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
<tr>
<td>RUR</td>
<td>Revenue Utilization Review</td>
</tr>
<tr>
<td>SAR</td>
<td>Secondary Authorization Request</td>
</tr>
<tr>
<td>SEOC</td>
<td>Standardized Episode of Care</td>
</tr>
<tr>
<td>VA</td>
<td>U.S. Department of Veterans Affairs</td>
</tr>
</tbody>
</table>
## Appendix B: Document Type Definitions

### Table 6: Document Type Definitions

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