



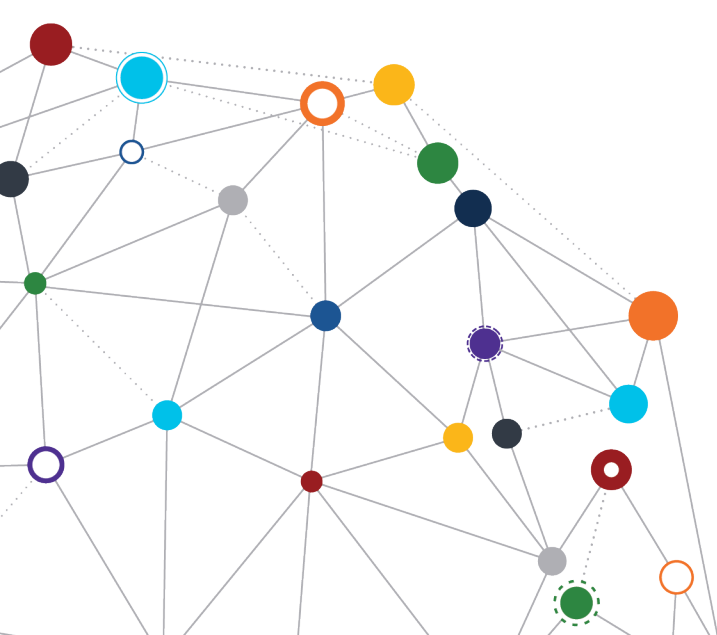
HealthShare Referral Manager Community Provider User Guide

*Community Care Referral and Authorization (CCRA)
Managed Services*

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FOR INTERNAL USE ONLY



VA



U.S. Department of Veterans Affairs
Office of Information and Technology
Development, Security, and Operations



Table of Contents

HealthShare Referral Manager.....	1
Community Provider User Guide.....	1
Table of Contents	2
Table of Figures	3
Table of Tables	4
1 Introduction.....	5
1.1 Project and Solution Overview	5
1.2 User Guide Overview	5
2 HSRM Lifecycle	6
3 Accessing HSRM.....	6
4 Working in HSRM.....	7
4.1 Locate a Referral.....	7
4.1.1 Column Heading Sort	7
4.1.2 Advanced Sort	8
4.1.3 Find Referrals	9
4.1.4 Find Referral by Patient.....	11
4.2 Manually Change the Status of a Referral	12
4.3 Access Standardized Episode of Care Information	14
4.4 Print the Offline Referral Form	15
4.4.1 Individual Referral	15
4.4.2 Multiple Referrals.....	16
4.5 Manage Documents.....	18
4.5.1 View and Download Documents	18
4.5.2 Add Documents.....	18
4.6 Record an Appointment.....	20
4.6.1 Locate a Provider Using the PPMS Provider Search	21
4.7 Cancel or Mark an Appointment as a No-Show.....	24
4.8 Record Contact	26
4.9 View Additional Referral Information.....	27
4.10 Working with Tasks	28
4.10.1 Create a Task	28
4.10.2 View or Edit a Task	29
4.10.3 Mark a Task Complete.....	32
4.11 Community Provider Precertification	33
4.11.1 Identify Referrals Requiring OHI Precertification	33
4.11.2 View Precertification Instructions	34
4.11.3 View Community Care Precertification Web Page	35
4.11.4 View SEOC Billing Codes for Precertification.....	36
4.11.5 Add a Precertification Notification Task.....	37
4.12 Canned Text	38
4.13 Generate Reports.....	38
4.14 Billing and Other Referral Information	40
5 Clinical Viewer	41
6 Additional Resources	43
Appendix A: Acronyms and Abbreviations	44
Appendix B: Revision History Table.....	45



Table of Figures

Figure 1: HSRM Referral Lifecycle	6
Figure 2: Referral List	8
Figure 3: Referral List – Advanced Sort	8
Figure 4: Sorting Options	9
Figure 5: Find Referrals	10
Figure 6: Referral Search Screen	10
Figure 7: Find Referral by Patient.....	11
Figure 8: Patient Search Screen.....	11
Figure 9: Patient List.....	12
Figure 10: Referral Details Screen	13
Figure 11: Referral Details – Status Field.....	13
Figure 12: Referral Details – SEOC Details.....	15
Figure 13: SEOC Details Screen	15
Figure 14: Component Menu – Offline Referral Form.....	16
Figure 15: Offline Referral Form.....	16
Figure 16: Referral List – Multiple Referrals.....	17
Figure 17: Component Menu – Selected Offline Referral Forms.....	17
Figure 18: Multiple Offline Referrals Form.....	18
Figure 19: Referral Details – Add Documents to a Referral.....	19
Figure 20: Add Document Screen.....	19
Figure 21: Referral Details – Record Appointment.....	20
Figure 22: Record Appointment Screen	21
Figure 23: Record Appointment Screen – PPMS Provider Search	22
Figure 24: PPMS Provider Search Screen – NPI Search	22
Figure 25: PPMS Provider Search Screen – NPI Search Results	23
Figure 26: Record Appointment Screen	23
Figure 27: Action Menu – Additional Referral Information	24
Figure 28: Additional Referral Information Screen.....	24
Figure 29: Appointment Change Status Screen.....	25
Figure 30: Additional Referral Information Screen.....	26
Figure 31: Action Menu – Record Contact	26
Figure 32: Record Contact – Record Contact Screen.....	27
Figure 33: Referral List – Additional Referral Information.....	27
Figure 34: Additional Referral Information	28
Figure 35: Action Menu – Add Task.....	29
Figure 36: Task Edit Screen	29
Figure 37: Menu – Task List.....	30
Figure 38: Task List Header Row	30
Figure 39: Task List Filters	30
Figure 40: Task List Screen	31



Figure 41: Task Edit Screen	31
Figure 42: Task List.....	32
Figure 43: Referral Details Screen	32
Figure 44: Menu – Task List.....	33
Figure 45: Task List Screen	33
Figure 46: Referral Screen – SEOC.....	34
Figure 47: Referral Details – Precertification Instructions.....	34
Figure 48: Community Care Precertification Requirements Web Page	35
Figure 49: Community Care End User Agreement Web Page – Accept	36
Figure 50: SEOC Precertification Excel Document	37
Figure 51: Action Menu – Add Task.....	37
Figure 52: Task Edit	38
Figure 53: Menu – Veteran Appointments Report	39
Figure 54: Veteran Appointments Report	40
Figure 55: Component Menu – Billing and Other Referral Information	40
Figure 56: Component Menu – Billing and Other Referral Information Sheet	41
Figure 57: Referral Details Screen	42
Figure 58: Clinical Viewer Access Menu	42
Figure 59: Clinical Viewer Home Screen.....	43

Table of Tables

Table 1: Report Types	39
Table 2: Acronyms and Abbreviations.....	44
Table 3: Revision History Table	45



1 Introduction

1.1 Project and Solution Overview

Community Care Referral and Authorization (CCRA) 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. The HealthShare Referral Manager (HSRM) application is an integral component of both the CCRA system and community care information technology (IT) architecture that allows Veterans to receive care from community providers.

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

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

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

1.2 User Guide Overview

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

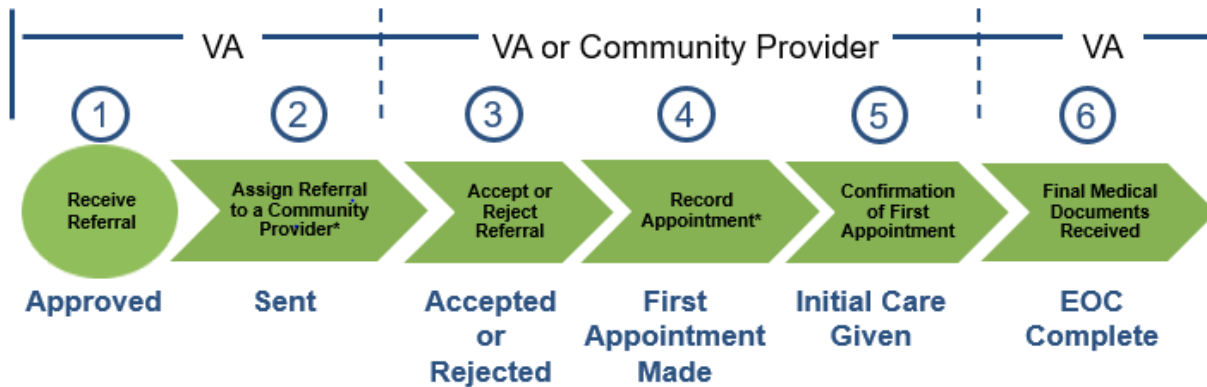
- » *Note: HSRM will be down for routine maintenance on the second Tuesday of every month from 10:00 p.m. to 4:00 a.m. Eastern Time. During this time, users will be unable to access the system.*



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.

The referral lifecycle model in **Figure 1** shows the steps occurring in the following order, with VA performing steps 1, 2, and 6, and VA or the community provider performing steps 3 through 5:

- » Step 1 is receiving the referral.
 - » Step 2 is assigning the referral to a community provider.
 - » Step 3 is accepting or rejecting the referral.
 - » Step 4 is recording the appointment.
 - » Step 5 is confirming the first appointment.
 - » Step 6 is receiving the final medical documents. This is performed by VA and completes the EOC.
- » *Note: A referral in any status will automatically update to EOC Complete 180 days after the referral expiration date.*

3 Accessing HSRM

Staff who typically process referrals, accept and reject referrals, record appointments, and share medical documentation with VA will need HSRM accounts.

To be eligible for HSRM, your facility must have an active Community Care Network (CCN) agreement with TriWest or Optum or have a Veterans Care Agreement (VCA) with VA.

Follow the steps below to sign up for HSRM.

- » *Note: Links to all documents are on the [Office of Community Care web page](#).*

1. Attend a training webinar on [Veterans Health Administration \(VHA\) Training Finder Real-time Affiliate Integrated Network](#) (TRAIN), complete the online community provider self-paced eLearning series on [VHA TRAIN](#) (11 modules), or refer to this guide to learn how to use HSRM.
2. Refer to the ID.me user guide to sign up for an ID.me account at the [ID.me website](#).
3. The facility point of contact from your organization fills out the End User Tracker (EUT) with information for staff requiring HSRM access, then submits the EUT to hsrmsupport@va.gov.
 - » *Note: Please ensure the email addresses entered in the EUT match those used for each respective user's ID.me account.*
4. The HSRM Help Desk provides the facility point of contact with confirmation that staff access has been granted.
5. All end users access HSRM via the CCRA website at <https://ccracommunity.va.gov>.
 - » *Note: Users must log in to HSRM at least once every 60 days to maintain their access. If your HSRM account is deactivated, email hsrmsupport@va.gov to request reactivation.*

Once these steps are complete, contact the VA medical center(s) you work with to let them know you have access to HSRM and to discuss your transition to using HSRM.

4 Working in HSRM

4.1 Locate a Referral



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

Users can locate referrals by sorting the **Referral List** or by using the **Find Referrals** or **Find Referral by Patient** features.

4.1.1 Column Heading Sort

Users can sort all lists in HSRM by column heading. Sorting the **Referral List** allows users to view the information in any column in ascending or descending order. The default view lists referrals by **Date Added** in descending order, making it easy to see the referrals most recently sent from VA.

To locate a referral by sorting column headings:

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



3. Select 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
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MRIMRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MRIMRA	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

4.1.2 Advanced Sort

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

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





1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers), then select the **Referral List** on the menu by using the up and down arrows or selecting it.
2. Select the hyperlink on the **Referral List** to display the **Advanced Sort** (screen readers call this “Referral List sorted **Date Added** descending, press enter to open sorting options”).

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
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MRIMRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MRIMRA	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

3. The available options appear. Users can select both primary and secondary sort criteria. Select **Ascending**  (referred to as the Ascending icon for screen readers) or **Descending**  (referred to as the Descending icon for screen readers) associated with the specific criterion for the sort. In the case shown below, Last Name and Date of Birth have been



selected in ascending order. The referrals are now sorted according to the sort criteria. Select the row of the relevant referral to view the **Referral Details** screen.

Figure 4: Sorting Options

The screenshot shows the 'Referral List' interface in HSRM - QA - MR7. The main table lists referrals with columns for Referring Facility, Last Name, First Name, Date of Birth, SSN, Service, Priority, Optional Task(s), Date Added, Referral Number, and Category of Care. A dropdown menu is open on the right side, showing various sorting options such as Date Added, Appt Date, Date of Birth, Community Provider / Facility, Category of Care, Last Name, First Name, SSN, Priority, Referring Facility, Service, Status, Referral Number, and Secondary Sort. The 'Referral List' title is visible at the top of the interface.

4.1.3 Find Referrals

In addition to sorting the Referral List, community providers can search for referrals in HSRM using the **Find Referrals** feature. Users can search by referral number, Unique Consult ID, network, treating specialty, provider name, service requested, category of care, date added from, date added to, priority, source of referral, status, and optional task(s).

» *Note: The Status field is mandatory and has multiple statuses selected by default. Users can choose from Accepted, First Appointment Made, Initial Care Given, Rejected, and Sent by removing those that are not desired.*

To find referrals:

1. Select the **Menu** icon (also called link menu for screen readers) from any screen to view the Main Menu.
2. Select **Find Referrals** to navigate to the **Referral Search** screen.



Figure 5: Find Referrals

Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MRI/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MRI/MRA	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

3. Enter information in any field within the **Referral Search** screen.

Figure 6: Referral Search Screen

Referral Search

Referral Number:

Unique Consult ID:

Network:

Treating Specialty:

Provider Name:

Service Requested:

Category of Care:

Community Provider/Facility:

Multiple Community Providers / Facilities:

Associated Care Provider(s):

Date Added From:

Date Added To:

Priority:

Source Of Referral:

* Status:

Accepted First Appointment Made Initial Care Given

Sent

Optional Task(s):

Multiple Optional Task(s):

HealthShare Referral Manager

Find

4. Select the **Find** button. The resulting **Referral List** screen lists referrals that match the search criteria.

» **Notes:**

- When the 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 not case sensitive (e.g., there is no difference between Smith, smith, and SMITH).
- The search looks for numbers matching, or starting with, the values entered (e.g., entering 325 will return 325 – 000 but not 000 – 325).



4.1.4 Find Referral by Patient

Community providers can search for a referral using the **Find Referral by Patient** feature. Users will have the patient’s last name, first name, and date of birth as required fields but can also refine their search using the patient’s middle name, gender, Social Security Number (SSN), Integration Control Number (ICN), or Electronic Data Interchange Personal Identifier (EDIPI).

To access the Find Referral by Patient feature:


1. Access the menu by selecting the Menu  icon.
2. Select Find Referral by Patient.

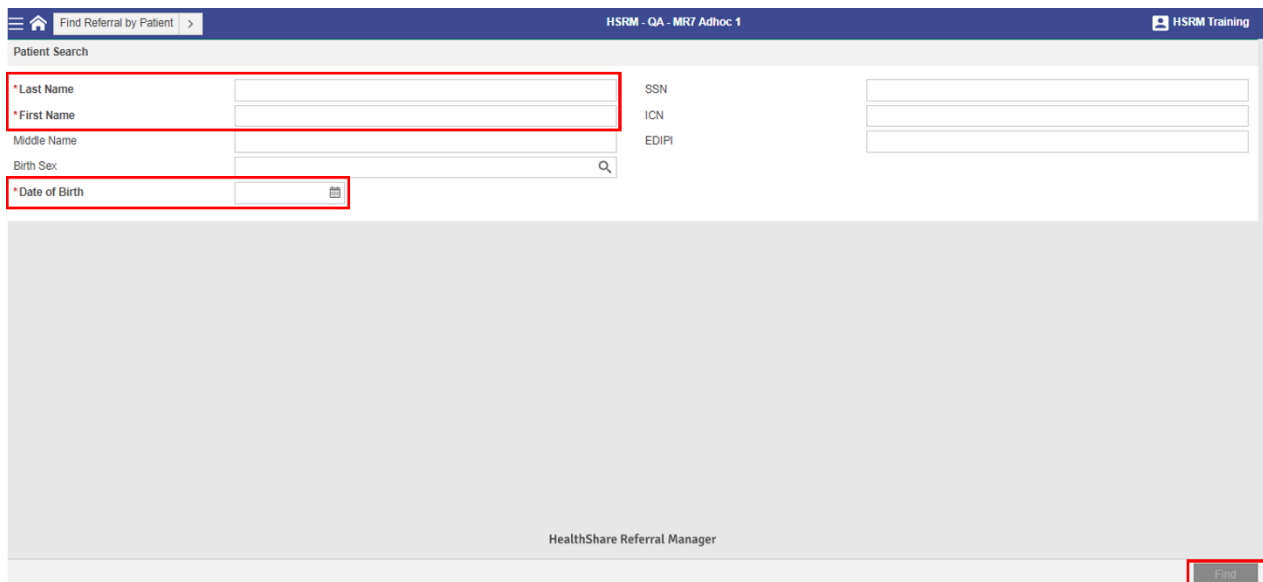
Figure 7: Find Referral by Patient



Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MRI/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MRI/MRA	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

3. Populate the required fields (i.e., Last Name, First Name, and Date of Birth) as well as any other optional fields (if known). Select the Find button to generate the search.

Figure 8: Patient Search Screen



Find Referral by Patient | HSRM - QA - MR7 Adhoc 1 | HSRM Training

Patient Search

*Last Name

*First Name

Middle Name

Birth Sex

*Date of Birth

SSN

ICN

EDIPI

HealthShare Referral Manager

Find



4. The resulting **Patient List** will show patients that match the search criteria. Select the row of the patient to view a Referral List for that specific patient.

Figure 9: Patient List

Last Name	First Name	Middle Name	Gender	Date of Birth	Age	Address	City	State	ZIP Code
ONE	Veteran		Male	01/01/1900	122 Yrs				

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 have access to all statuses except EOC Complete.

To manually update the status of a referral:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.

Figure 10: Referral Details Screen

The screenshot shows the 'Referral Details' screen for a veteran. At the top, it displays 'ONE, Veteran', 'DOB: 01/01/1900', and 'Age: 122 Yrs'. The 'Referral Details' section includes fields for 'Referring Facility' (Bath VA Medical Center), 'Provisional Diagnosis' (R519 Headache, unspecified), 'Referral Date' (09/01/2022), 'Referral Category' (Inpatient), and 'Priority' (Routine). The 'Service/s Requested' section shows 'Category of Care' as 'CARDIOLOGY' and 'Service Requested' as 'Cardiology Cath - PCI SEOC 1.1.10 PRCT REV'. There is also a 'SEOC Details' link. At the bottom, the 'Authority' section shows 'Program Authority' as 'Authorized/Pre-authorized VA Referral (not otherwise specified) - 1703' and 'Estimated Cost of Care' as '1,682.85'. Buttons for 'Apply' and 'Update' are visible at the bottom right.



3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen. Select the **Status** field and select the new status. Community providers can change the referral status to Accepted, Rejected, First Appointment Made (the status automatically changes to First Appointment Made when an initial appointment is recorded), or Initial Care Given, depending on where the referral is in its lifecycle.

» *Note: If a user selects the Rejected status, the Referral Return Reason field will be mandatory. Additionally, the Referral Return Reason field is only editable when the user updates the status to Rejected.*

Figure 11: Referral Details – Status Field

The screenshot shows the 'Referral Processing Information' section of the 'Referral Details' screen. The 'Status' field is highlighted with a red box, and a dropdown menu is open showing options: 'Accepted' (highlighted in yellow), 'Rejected', 'First Appointment Made', 'Initial Care Given', and 'Sent'. The 'Referral Return Reason' field is also highlighted with a red box. The 'Referral Number' is 'VA000005064' and the 'Source of Referral' is 'Interfaced from VA'. The 'Date Added' is '06/14/2021'. The 'Update Date' is '06/07/2022'. The 'Update Time' is '10:54'. The 'Update User' is 'QA Team Account'. The 'Update Facility' is 'Togus VA Medical Center'. The 'Ordering Officer' is 'QA Team Account'. The 'Assigned Workgroup' is 'Veteran Communication Preference'. The 'Veteran Communication Preference' is 'CG Referral'. The 'Initial Community Provider/Facility Information' section shows 'Treating Specialty' as 'General Acute Care Hospital', 'Community Provider / Facility' as 'COMMUNITY MEDICAL CENTER', 'Provider Location' as 'COMMUNITY MEDICAL CENTER-99 ROUT', and 'Provider Name' as 'Community Medical Center Inc.'. Buttons for 'Apply' and 'Update' are visible at the bottom right.



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

» *Note: The C6 Referral checkbox under the Referral Processing Information section pertains to referrals assigned to the Community Care Clinical Coordination Contact Center (C6). These user groups include C6 Supervisor, C6 Administrator, and C6 Clinical Staff. If the box is checked, the users in the C6 groups will be able to view and manage these referrals.*

4.3 Access Standardized Episode of Care Information

A Standardized Episode of Care (SEOC) is a bundle of services authorized under a single referral. A SEOC includes all clinically related services for one patient for a discrete diagnostic condition within a specific period across a continuum of care. 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 (refer to the [Locate a Referral](#) section of this guide).
2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Navigate to the **Service/s Requested** section on the **Referral Details** screen and select the **SEOC Details** link.

» *Note: VA is required by law to obtain precertification and bill third-party payers (TPPs) for care that is not related to a Veteran's service or to obtain special authority for Veterans who have other health insurance (OHI). Users can find precertification information and instructions under the SEOC Details link and in the Offline Referral Form.*



Figure 12: Referral Details – SEOC Details

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

Figure 13: SEOC Details Screen

SEOC Service	Quantity Limit
1. Initial outpatient evaluation and treatment for the referred condition on the consult order	999
2. Diagnostic imaging relevant to the referred condition on the consult order	999
3. Diagnostic studies relevant to the referred condition on the consult order	999
4. Labs and pathology relevant to the referred condition on the consult order	999
5. One cardiac catheterization with PCI interventions and overnight observation if required	1
6. Pre-procedure medical and basic cardiac clearance, as indicated (including H+P/labs, EKG, CXR, echo)**Note: cardiac testing or evaluation outside of the above CXR, EKG and echo will require an RFS for a cardiology referral	999
7. Anesthesia consultation related to the procedure	999
8. Procedures performed by a cardiologist including but not limited to: ablations, implantation of cardiac devices, etc. Request for Service (RFS) is required for other non-emergent cardiac related services or specialties to include but not limited to electrophysiology, cardiothoracic surgery, etc.	999
9. Inpatient or observation admission for surgery and/or procedure and related procedure and/or surgery complications AND for emergent complications related to cardiac catheterization or other cardiac procedures performed under #8 to include emergent surgical intervention such as: cardiac bypass, TAVR, VAD, angioplasty. **Note: Notify the referring VA of admission status to initiate and facilitate care coordination and discharge planning.	999
10. Follow-up visits for this episode of care	999
11. Outpatient cardiac rehabilitation, up to 36 visits, no more than 3x per week	36

HealthShare Referral Manager

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:




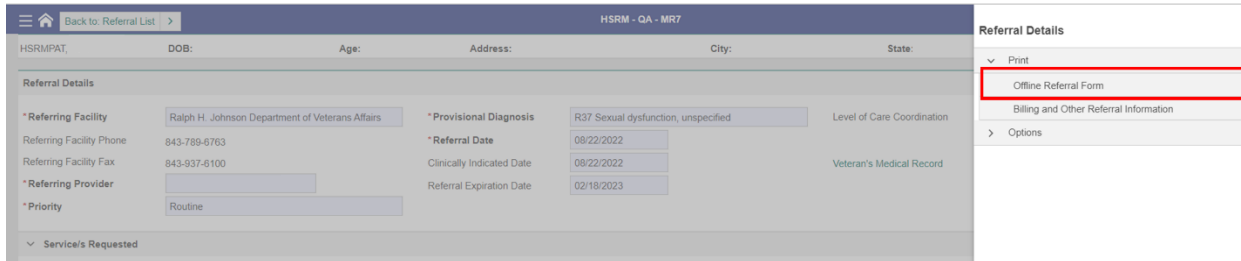
1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Select the **Component Menu** icon  (also called the Referral List component menu button by screen readers) from the Referral Details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

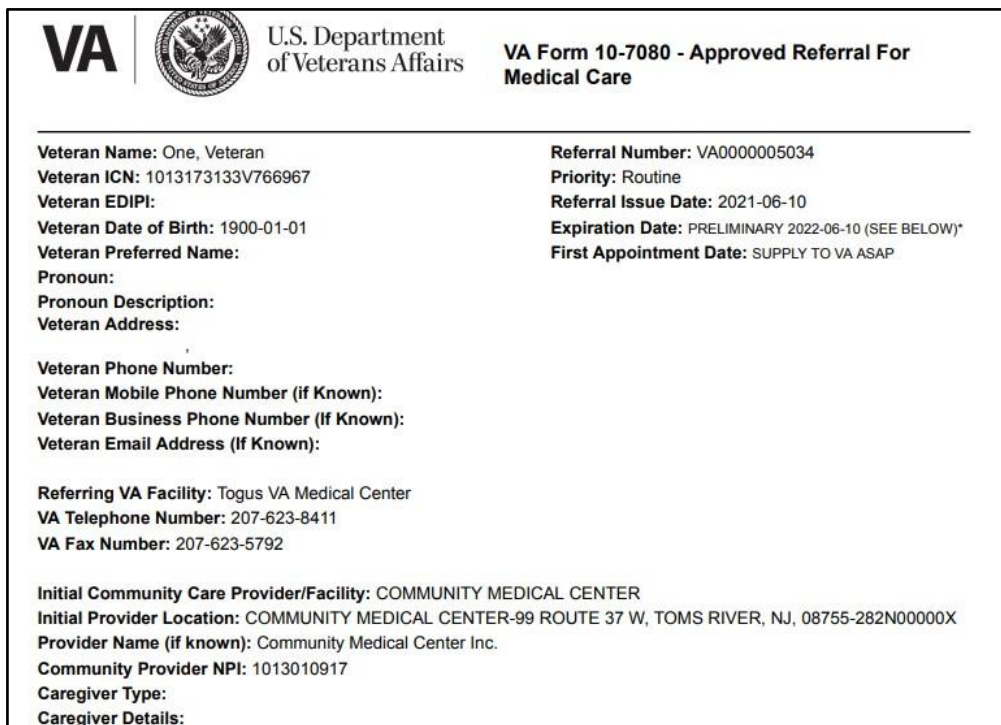
Figure 14: Component Menu – Offline Referral Form



The screenshot shows the 'Referral Details' screen for a referral with ID HSRM - QA - MR7. The 'Referral Details' section contains fields for Referring Facility (Ralph H. Johnson Department of Veterans Affairs), Referring Facility Phone (843-789-8763), Referring Facility Fax (843-937-6100), Referring Provider, Priority (Routine), Provisional Diagnosis (R37 Sexual dysfunction, unspecified), Referral Date (09/22/2022), Clinically Indicated Date (09/22/2022), Referral Expiration Date (02/18/2023), and Level of Care Coordination (Veteran's Medical Record). On the right side, a 'Referral Details' sidebar is visible with a 'Print' dropdown menu. The 'Offline Referral Form' option is highlighted with a red box.

4. The **Offline Referral Form** appears in a new browser tab and users can print, download, and save the form.

Figure 15: Offline Referral Form



The screenshot shows the 'VA Form 10-7080 - Approved Referral For Medical Care' form. The form is titled 'U.S. Department of Veterans Affairs' and includes the following information:

- Veteran Name:** One, Veteran
- Veteran ICN:** 1013173133V766967
- Veteran EDIP:**
- Veteran Date of Birth:** 1900-01-01
- Veteran Preferred Name:**
- Pronoun:**
- Pronoun Description:**
- Veteran Address:**
- Veteran Phone Number:**
- Veteran Mobile Phone Number (if Known):**
- Veteran Business Phone Number (if Known):**
- Veteran Email Address (if Known):**
- Referring VA Facility:** Togus VA Medical Center
- VA Telephone Number:** 207-623-8411
- VA Fax Number:** 207-623-5792
- Initial Community Care Provider/Facility:** COMMUNITY MEDICAL CENTER
- Initial Provider Location:** COMMUNITY MEDICAL CENTER-99 ROUTE 37 W, TOMS RIVER, NJ, 08755-282N0000X
- Provider Name (if known):** Community Medical Center Inc.
- Community Provider NPI:** 1013010917
- Caregiver Type:**
- Caregiver Details:**

Additional information on the right side of the form includes:

- Referral Number:** VA0000005034
- Priority:** Routine
- Referral Issue Date:** 2021-06-10
- Expiration Date:** PRELIMINARY 2022-06-10 (SEE BELOW)*
- First Appointment Date:** SUPPLY TO VA ASAP

4.4.2 Multiple Referrals

To generate an Offline Referral Form for multiple referrals:





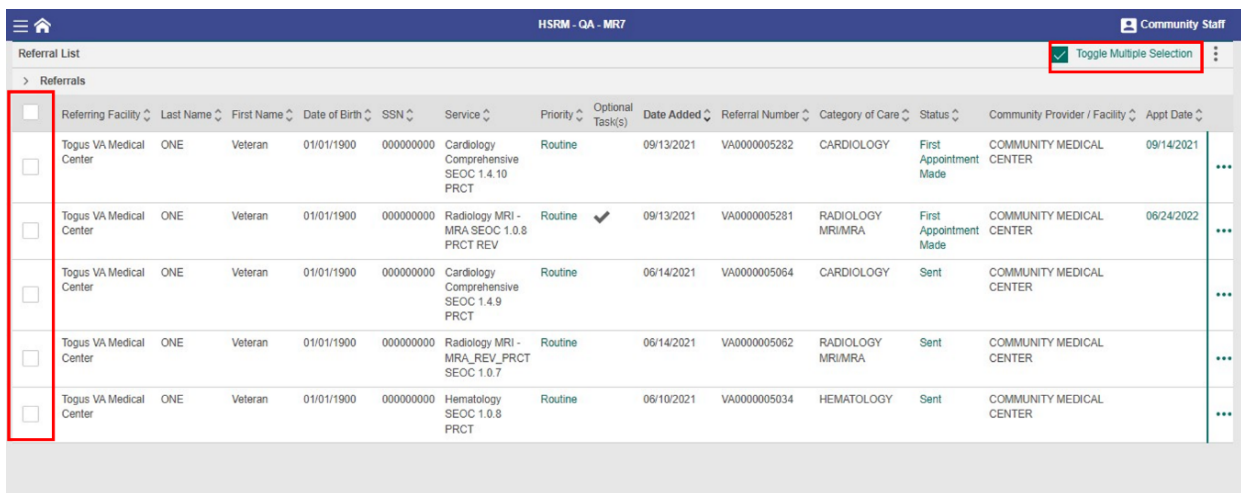
1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers), then selecting **Referral List** on the menu by using the up and down arrows or selecting it.
 - » *Note: Users may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

Figure 16: Referral List – Multiple Referrals



HSRPM - QA - MR7														Community Staff	
Referral List															
<input checked="" type="checkbox"/> Toggle Multiple Selection															
Referrals															
<input type="checkbox"/>	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"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021	...
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	<input checked="" type="checkbox"/>	09/13/2021	VA0000005281	RADIOLOGY MR/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022	...
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER		...
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MR/MRA	Sent	COMMUNITY MEDICAL CENTER		...
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER		...


3. Select the **Component Menu** icon  (also called Referral List component menu button by screen readers) and select **Selected Offline Referral Forms** from the **Email** drop-down menu.

Figure 17: Component Menu – Selected Offline Referral Forms



HealthShare Referral Manager - Demo - R12.0.4.1														Referral List	
Referrals															
<input type="checkbox"/> Email															
Selected Offline Referral Forms															
<input type="checkbox"/>	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"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.0.6 PRCT REV	Routine		08/14/2020	VA0000000681	CARDIOLOGY TESTS, PROCEDURES, STUDIES				
<input checked="" type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Neurology SEOC 1.0.6 PRCT	Routine		08/14/2020	VA0000000682	NEUROLOGY				
<input checked="" type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		12/11/2019	VA0000000237	ALLERGY AND IMMUNOLOGY				
<input checked="" type="checkbox"/>	Batavia VA Medical Center	ONE	Veteran	01/01/1900	000000000	Acupuncture-Chronic Care Management SEOC 1.2.4	Routine		01/03/2020	VA0000000264	ACUPUNCTURE				
<input type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.1.7 PRCT REV	Routine		11/11/2020	VA0000000753	CARDIOLOGY				
<input type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.1.7 PRCT REV	Routine		11/11/2020	VA0000000754	CARDIOLOGY				

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



Figure 18: Multiple Offline Referrals 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	VA0000000237	2019-12-11	Lebanon VA Medical Center	ALLERGY AND IMMUNOLOGY	
One, Veteran	VA0000000264	2020-01-03	Batavia VA Medical Center	ACUPUNCTURE	
One, Veteran	VA0000000681	2020-08-14	Lebanon VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	
One, Veteran	VA0000000682	2020-08-14	Lebanon VA Medical Center	NEUROLOGY	

» *Note: Users can download and save the Offline Referral Form. Compiled Offline Referral Forms will contain a cover page.*

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 are displayed 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 (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.
3. Select **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen. Here, users can view all documents that have been added to the referral.

» *Note: Users may also view and download documents by accessing Documents from the Additional Referral Information screen. These instructions are in the View Additional Referral Information section of this guide.*

4.5.2 Add Documents

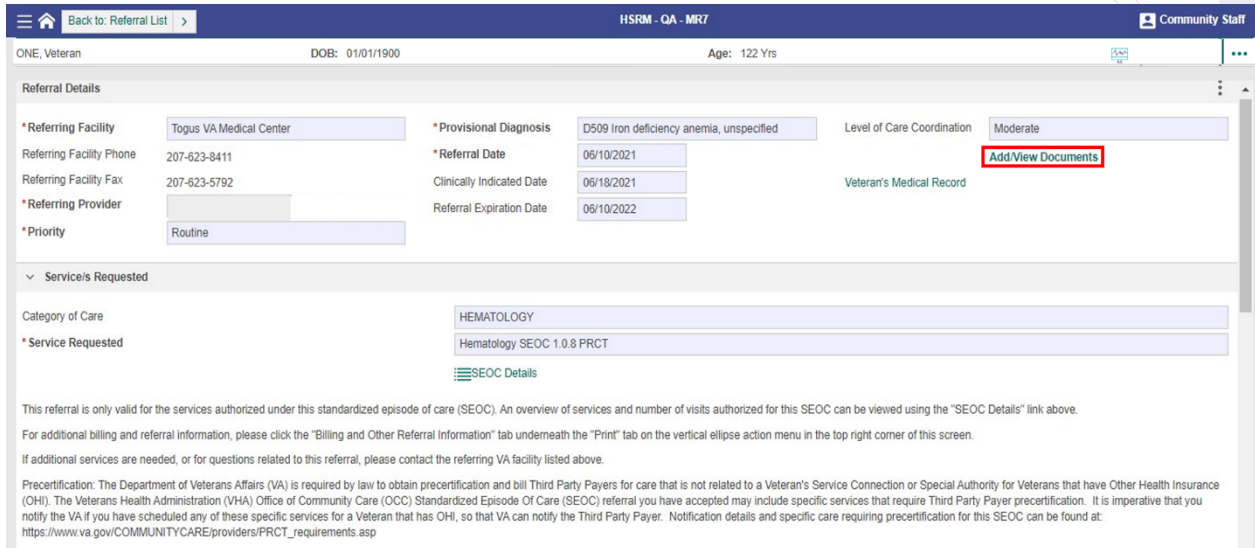
To add documents to a referral:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.



3. Select **Add/View Documents** on the **Referral Details** screen to open the Documents screen.

Figure 19: Referral Details – Add Documents to a Referral



Referral Details

*Referring Facility: Togus VA Medical Center
Referring Facility Phone: 207-623-8411
Referring Facility Fax: 207-623-5792
*Referring Provider: [Redacted]
*Priority: Routine

*Provisional Diagnosis: D509 Iron deficiency anemia, unspecified
*Referral Date: 06/10/2021
Clinically Indicated Date: 06/18/2021
Referral Expiration Date: 06/10/2022

Level of Care Coordination: Moderate
Veteran's Medical Record

Add/View Documents

Service/s Requested

Category of Care: HEMATOLOGY
*Service Requested: Hematology SEOC 1.0.8 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.

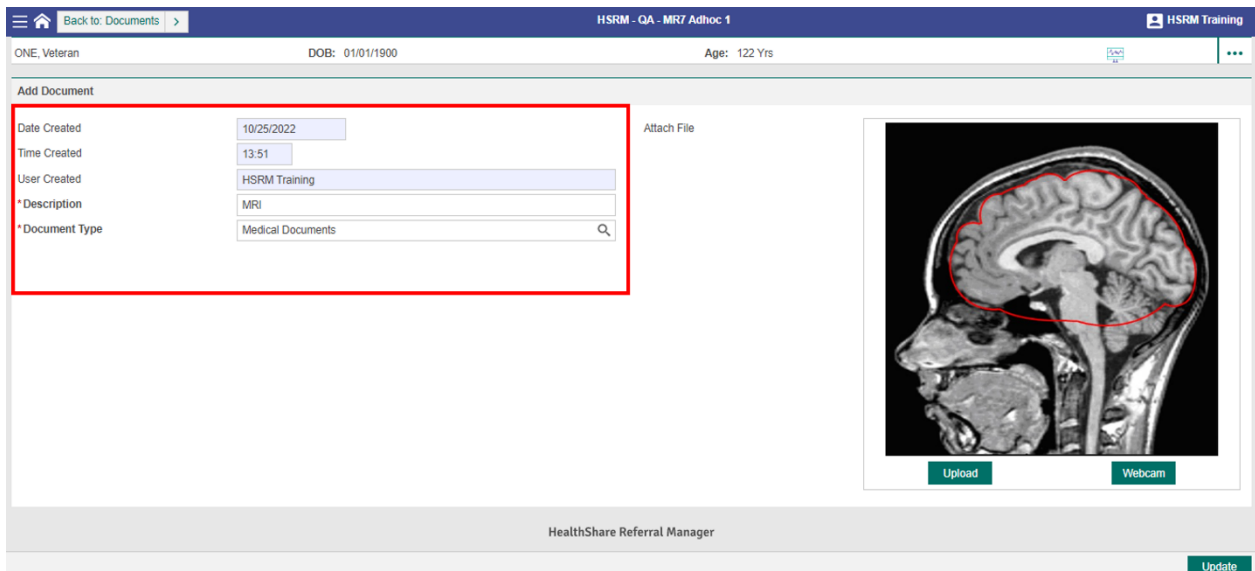
Pre-certification: The Department of Veterans Affairs (VA) is required by law to obtain pre-certification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration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

4. Select the **New** button  on the **Documents** screen. The **Add Document** screen appears.

5. Enter data in the corresponding fields on the **Add Document** screen.

» *Note: The Date Created, Time Created, and User Created fields populate automatically and are read-only.*


Figure 20: Add Document Screen



Add Document

Date Created: 10/25/2022
Time Created: 13:51
User Created: HSRM Training
*Description: MRI
*Document Type: Medical Documents

Attach File




Upload Webcam


HealthShare Referral Manager

Update

6. Select the **Upload** button  and select the file from the computer's hard drive.

7. To identify the type of document, select the **Magnifying Glass** icon  (also called document type lookup graphic by screen readers) in the **Document Type** field and choose

the appropriate type (e.g., **Medical Documents** or **Request for Services/SAR**). This will trigger an automatic task for VA to review the document.

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

4.6 Record an Appointment

Recording appointments in HSRM makes this information available to VA without having to phone, email, or fax, thus reducing the administrative burden for both VA and community providers. Users can record an appointment in the system from the **Referral Details** screen. Users must record a first appointment for every referral they accept. Recording any subsequent appointments in HSRM is optional.

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

To record an appointment:


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

Figure 21: Referral Details – Record Appointment



ONE_Veteran		DOB: 01/01/1900		Age: 122 Yrs	
Referral Details					
* Referring Facility	Togus VA Medical Center	* Provisional Diagnosis	D509 Iron deficiency anemia, unspecified	Level of C	
Referring Facility Phone	207-623-8411	* Referral Date	06/19/2021	Veteran's	
Referring Facility Fax	207-623-5792	Clinically Indicated Date	06/18/2021		

- Print
- Outline Referral Form
- Billing and Other Referral Information
- Options
- Record Appointment

5. Enter the appropriate information (e.g., **Service Requested**, **Appointment for**, **Date**, and **Time**). Additionally, if the referral is with a provider in CCNs 1 – 5, HSRM requires users to indicate whether the Veteran self-scheduled the appointment or requested the specific appointment time. The mandatory question asks, “Did the Veteran self-schedule their appointment or independently request this specific appointment date?”

» *Notes:*

- *HSRM marks mandatory fields with an asterisk (screen readers identify these fields as **Star and Required**).*
- *The appointment date cannot be earlier than the referral date.*

Figure 22: Record Appointment Screen

ONE, Veteran DOB: 01/01/1900 Age: 122 Yrs

Record Appointment

* Service Requested: Cardiology Cath - PCI SEOC 1.1.11 PRCT REV

* Appointment for: 1. Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order-CARDIOLOGY-1.1.11

Scheduling Method

* Date: 10/28/2022 * Time: 09:00 (EST) America/New_York

* Did the Veteran self-schedule their appointment or independently request this specific appointment date?

* Treating Specialty: Dentist

* Community Provider/Facility: VACCN TEST Facility

* Appointment Location: VACCN TEST Facility-156 WILLIAM ST ; FL 4, New York, NY, 10038-12230000X

Provider Name: VACCN TEST Facility

Affiliation: CCN1

Appointment Type

Appointment Duration

Appointment Reason

Notes

Update

6. If the name of the specific facility caregiver is unknown or the appointment is with a facility caregiver other than the initial community provider, users may search for a community provider using the **Provider Profile Management System (PPMS) Provider Search**. This search component is described in the following section.

4.6.1 Locate a Provider Using the PPMS Provider Search

Users can find a list of providers and their details using the PPMS Provider Search feature. The PPMS Provider Search allows users to search by a provider's National Provider Identifier (NPI), state, zip code, and affiliation.

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



Figure 23: Record Appointment Screen – PPMS Provider Search

The screenshot shows the 'Record Appointment' screen for a veteran. The 'PPMS Provider Search' section is highlighted with a red box. The search results list the following information:

Field	Value
Service Requested	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV
Appointment for	1. Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order-CARDIOLOGY-1.1.11
Scheduling Method	
Date	10/26/2022
Time	09:00 (EST) America/New_York
Did the Veteran self-schedule their appointment or independently request this specific appointment date?	
Treating Specialty	Dentist
Community Provider/Facility	PPMS Provider Search
Appointment Location	VACCN TEST Facility
Provider Name	VACCN TEST Facility-156 WILLIAM ST ; FL 4, New York, NY, 10038-12230000X
Affiliation	VACCN TEST Facility
Drive Time	CCN1
Appointment Type	
Appointment Duration	
Appointment Reason	
Notes	

2. Enter the provider’s NPI in the **NPI** field. The **State**, **Zip Code**, and **Affiliation** fields may also be used to narrow the search results. When a zip code is entered into the **Zip Code** field, the **State** field will automatically populate.
3. Select the **Find** button to connect directly to **PPMS** to find the provider with the designated NPI.

Figure 24: PPMS Provider Search Screen – NPI Search

The screenshot shows the 'PPMS Provider Search' screen. The 'NPI' field is highlighted with a red box and contains the value '1093818106'. The 'Find' button is also highlighted with a red box. The search criteria are as follows:

Field	Value
NPI	1093818106
State	
Zip Code	
Affiliation	

The search results table is empty, with the following headers:

Specialty	Care Provider	Affiliation	Phone	Care Site	Address
-----------	---------------	-------------	-------	-----------	---------

HealthShare Referral Manager

4. **Select** the appropriate provider.



Figure 25: PPMS Provider Search Screen – NPI Search Results

The screenshot shows the 'PPMS Provider Search' interface. At the top, there is a navigation bar with 'Back to: Record Appointment', 'HSRM - QA - MR7', and 'Community Staff'. Below this, patient information is displayed: 'ONE, Veteran', 'DOB: 01/01/1900', and 'Age: 122 Yrs'. The search criteria are: NPI: 1093818106, State: [blank], Zip Code: [blank], and Affiliation: [blank]. A message states 'Records found: 1 (1s)'. Below this is a table with the following data:

Specialty	Care Provider	Affiliation	Phone	Care Site	Address	Provider NPI	High Performing Provider	At Home Service
Pharmacy - Community/Retail Pharmacy	B & B PHARMACY	CCN1				1093818106	Unknown	No

At the bottom of the screen, there is a 'Find' button and the text 'HealthShare Referral Manager'.


Figure 26: Record Appointment Screen

The screenshot shows the 'Record Appointment' screen. The fields are filled with the following information:

- * Service Requested:** Biofeedback SEOC 1.6.3 PRCT
- * Appointment for:** Initial medical or psychotherapy evaluation (1). Psychological testing is not covered in this SEOC.-ACUPUNCTURE-1.6.3
- Scheduling Method:** [blank]
- * Date:** 09/15/2021, *Time: 09:00 (EST), America/New_York
- * Did the Veteran self-schedule their appointment or independently request this specific appointment date?:** Yes
- * Treating Specialty:** Pharmacy - Community/Retail Pharmacy
- * Community Provider/Facility:** B & B PHARMACY
- * Appointment Location:** B & B PHARMACY-
- Provider Name:** B & B PHARMACY
- Affiliation:** CCN1
- Drive Time:** [blank]
- Appointment Type:** [blank]
- Appointment Duration:** [blank]
- Appointment Reason:** [blank]

An 'Update' button is located at the bottom right of the form.

» *Note: Scheduling Method, Appointment Type, Appointment Duration, Appointment Reason, and Notes fields are optional. However, entering information in these fields is a best practice, as it ensures that VA and the community provider have access to all relevant appointment information in a central location.*

5. Select the **Update** button  on the **Record Appointment** screen to save the appointment information. The **Referral Details** screen appears, and the status of the referral will automatically change to **First Appointment Made**.

» *Note: If there is an appointment 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 their facility's task list that will allow them to work with the referral.*



» *Note: The first appointment made in the SEOC will be on the Referral List for the duration of the referral, regardless of subsequent appointments that are scheduled and occur. The date of the first appointment made also displays in the Appointment Date field in the Initial Community Provider/Facility Information section on the Referral Details screen.*

4.7 Cancel or Mark an Appointment as a No-Show

To cancel an appointment:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon **...** (also called link Referral List action menu by screen readers) next to the corresponding referral row and select Additional Referral Information.

» *Note: The Action Menu icon **...** is also available from the Referral Details screen in the Patient Banner.*

Figure 27: Action Menu – Additional Referral Information

The screenshot shows a web interface for a referral. At the top, there's a navigation bar with 'Back to: Referral List' and 'HSRM - QA - MR7'. Below that, patient information is displayed: 'ONE, Veteran', 'DOB: 01/01/1900', and 'Age: 122 Yrs'. The main section is titled 'Referral Details' and contains several fields:

- * Referring Facility: Togus VA Medical Center
- * Referring Facility Phone: 207-623-8411
- * Referring Facility Fax: 207-623-5792
- * Referring Provider: [Empty]
- * Priority: Routine
- * Provisional Diagnosis: D509 Iron deficiency anemia, unspecified
- * Referral Date: 05/10/2021
- Clinically Indicated Date: 09/18/2021
- Referral Expiration Date: 05/10/2022
- Category of Care: HEMATOLOGY
- * Service Requested: Hematology SEOC 1.0.8 PRCT

 On the right side, there is an 'Action Menu' with options: 'Add Task', 'Patient Details', 'Additional Referral Information' (highlighted with a red box), and 'Record Contact'.

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

Figure 28: Additional Referral Information Screen

The screenshot shows the 'Appointments' section of the referral details. It features a table with the following columns: 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, and Reason for Cancellation. The first row is highlighted, and its 'Status' is 'Booked', which is enclosed in a red box. The other rows show 'Cancelled' status.

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
VA000005792		05/18/2022	10:10	3. Diagnostic studies relevant to the referred condition on the consult order-CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Booked		
VA000005799		05/18/2022	10:54	1. Initial outpatient evaluation and treatment for the referred condition on the consult order-CARDIOLOGY-1.0.7	Skilled Nursing Facility				CCN2	Outpatient		Cancelled		Cancelled by Community Provider
VA000005792		05/17/2022	13:03	1. Initial outpatient evaluation and treatment for the referred condition on the consult order-CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Cancelled		Cancelled by Community Provider
VA000005792		05/17/2022	13:30	11. Outpatient cardiac rehabilitation, up to 36 visits, no more than 3x per week.CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Cancelled		Cancelled by Community Provider





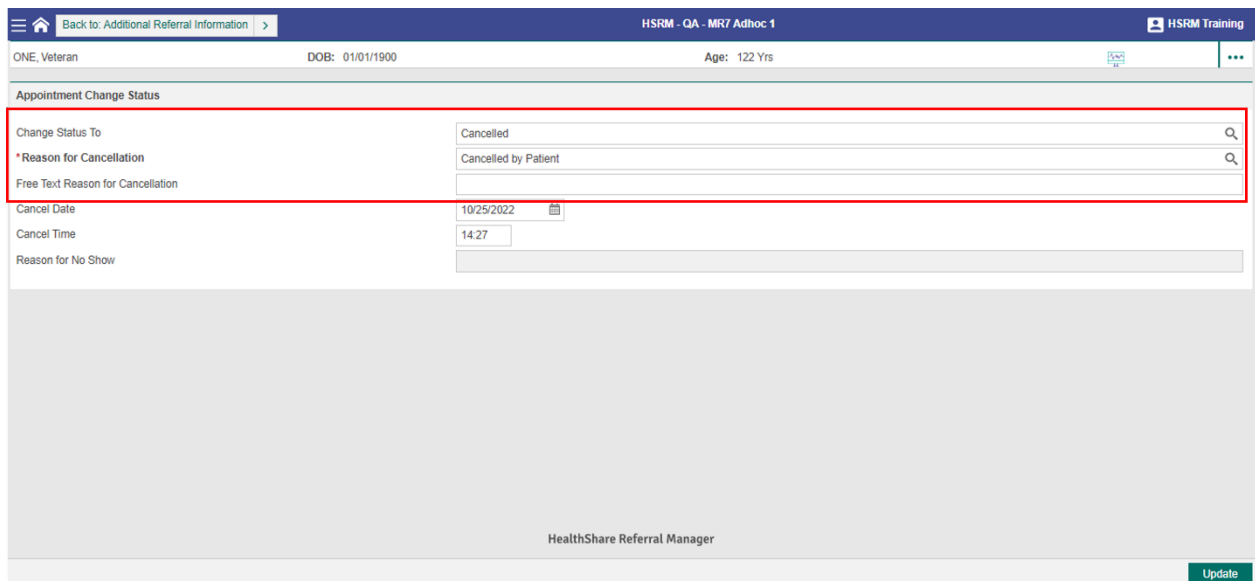
- » *Note: Users can also access the Change Status screen by selecting the Appointment For link located on the referral row and then selecting Change Status, located beneath the Appointment Status field.*
- 4. The **Change Status To** field automatically populates as **Cancelled**. If selecting a different status, select the **Magnifying Glass** icon  (also called change status to lookup graphic by screen readers) in the **Change Status To** field and select a status from the drop-down list.
 - » *Note: If a user selects No Show, they must also populate the Reason for No Show field.*
- 5. Select the **Magnifying Glass** icon  (also called 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: Users can also use the Free Text for Cancellation field for additional details regarding the appointment (e.g., spoke to Veteran’s family member to cancel the appointment).*

Figure 29: Appointment Change Status Screen



The screenshot displays the 'Appointment Change Status' screen. At the top, there is a navigation bar with 'Back to: Additional Referral Information' and 'HSRM - QA - MR7 Adhoc 1'. Below this, patient information is shown: 'ONE, Veteran', 'DOB: 01/01/1900', and 'Age: 122 Yrs'. The main section is titled 'Appointment Change Status' and contains several input fields. A red box highlights the 'Change Status To' field (set to 'Cancelled'), the '* Reason for Cancellation' field (set to 'Cancelled by Patient'), and the 'Free Text Reason for Cancellation' field. Below these are 'Cancel Date' (10/25/2022), 'Cancel Time' (14:27), and 'Reason for No Show'. An 'Update' button is located at the bottom right of the form area.


7. Select the **Update** button  to save changes.
8. The appointment status now displays as **Cancelled**.

Figure 30: Additional Referral Information Screen

Referral Number	Community Provider / Facility	Date	Time	Appointment for	Treating Specialty	Appointment Location	Provider Name or Location	Drive Time	Affiliation	Appointment Type	Scheduling Method	Status	Notes	Reason for Cancellation
VA000005792		05/18/2022	10:10	3. Diagnostic studies relevant to the referred condition on the consult order-CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Cancelled		
VA000005799		05/18/2022	10:54	1. Initial outpatient evaluation and treatment for the referred condition on the consult order-CARDIOLOGY-1.0.7	Skilled Nursing Facility				CCN2	Outpatient		Cancelled		Cancelled by Community Provider
VA000005792		05/17/2022	13:03	1. Initial outpatient evaluation and treatment for the referred condition on the consult order-CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Cancelled		Cancelled by Community Provider
VA000005792		05/17/2022	13:30	11. Outpatient cardiac rehabilitation, up to 35 visits, no more than 3x per week-CARDIOLOGY-1.4.12	Home Health				Veteran's Care Agreement (VCA)	Outpatient		Cancelled		Cancelled by Community Provider

4.8 Record Contact

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

» *Note: The Veteran's preferred method of communication appears in a read-only field in the Referral Processing Information section of the Referral Details screen. When reaching out to a Veteran, community providers should view this field first.*

To record contact about a referral:

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

Figure 31: Action Menu – Record Contact

Referring Facility	Referring Facility Phone	Referring Facility Fax	Referring Provider	* Priority	* Provisional Diagnosis	* Referral Date	Clinically Indicated Date	Referral Expiration Date	Service's Requested
Togus VA Medical Center	207-623-8411	207-623-5792		Routine	D509 Iron deficiency anemia, unspecified	06/10/2021	06/18/2021	06/10/2022	HEMATOLOGY Hematology SEOC 1.0.8 PRCT




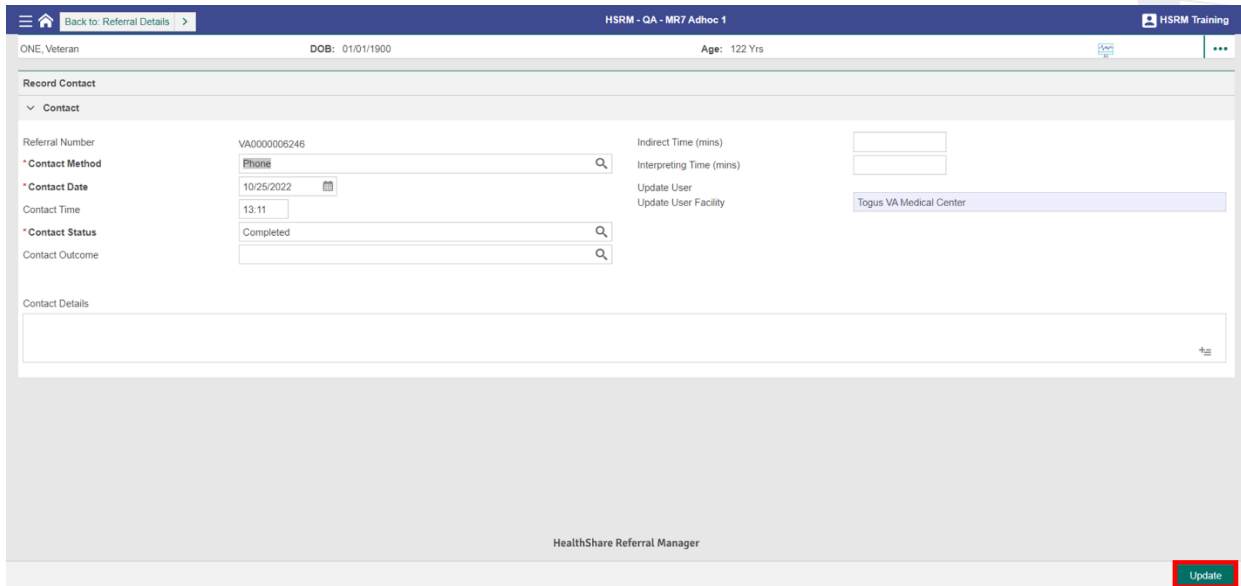
5. Enter the relevant information regarding the contact and select the **Update** button  to save changes.


Figure 32: 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 (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon  (also called link Referral List action menu by screen readers) next to the corresponding referral row and select Additional Referral Information.


» *Note: The Action Menu icon  (also called link Referral List action menu by screen readers) is also available from the Referral Details screen in the Patient Banner.*

Figure 33: Referral List – Additional Referral Information



3. The **Additional Referral Information** screen appears, showing contacts, appointments, referral documents, care coordination documents, referral notes, and patient letters related to the referral. Select each to view the corresponding information.

Figure 34: Additional Referral Information

ONE, Veteran											
DOB: 01/01/1900		Age: 122 Yrs		HSRM Training							
<ul style="list-style-type: none"> Contacts ↕ Contact Date, Contact Time <table border="1"> <thead> <tr> <th>Referral Number</th> <th>Contact Date</th> <th>Contact Method</th> <th>Contact Outcome</th> <th colspan="2">Contact Details</th> </tr> </thead> </table>						Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details	
Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details							
<ul style="list-style-type: none"> Appointments ↕ Date, Treating Specialty 											
<ul style="list-style-type: none"> Referral Documents <table border="1"> <thead> <tr> <th>Document Type</th> <th>Description</th> <th>Date Created</th> <th>Time Created</th> <th>Last Update User</th> <th>Last Update Facility</th> </tr> </thead> </table>						Document Type	Description	Date Created	Time Created	Last Update User	Last Update Facility
Document Type	Description	Date Created	Time Created	Last Update User	Last Update Facility						
<ul style="list-style-type: none"> Care Coordination Documents ↕ Date Created <table border="1"> <thead> <tr> <th>Description</th> <th>Document Type</th> <th>Date Created</th> <th>Time Created</th> </tr> </thead> </table>						Description	Document Type	Date Created	Time Created		
Description	Document Type	Date Created	Time Created								
<ul style="list-style-type: none"> Referral Consult Factors 											
<ul style="list-style-type: none"> Referrals: Notes ↕ Date, Time 											
<ul style="list-style-type: none"> Letters: Patient 											

» *Note: Users can sort each list using the column header and advanced sorting methods.*

4.10 Working with Tasks

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

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

4.10.1 Create a Task

To manually create a task:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon **⋮** (also called link Referral List action menu by screen readers) next to the corresponding referral row, then select **Add Task**.

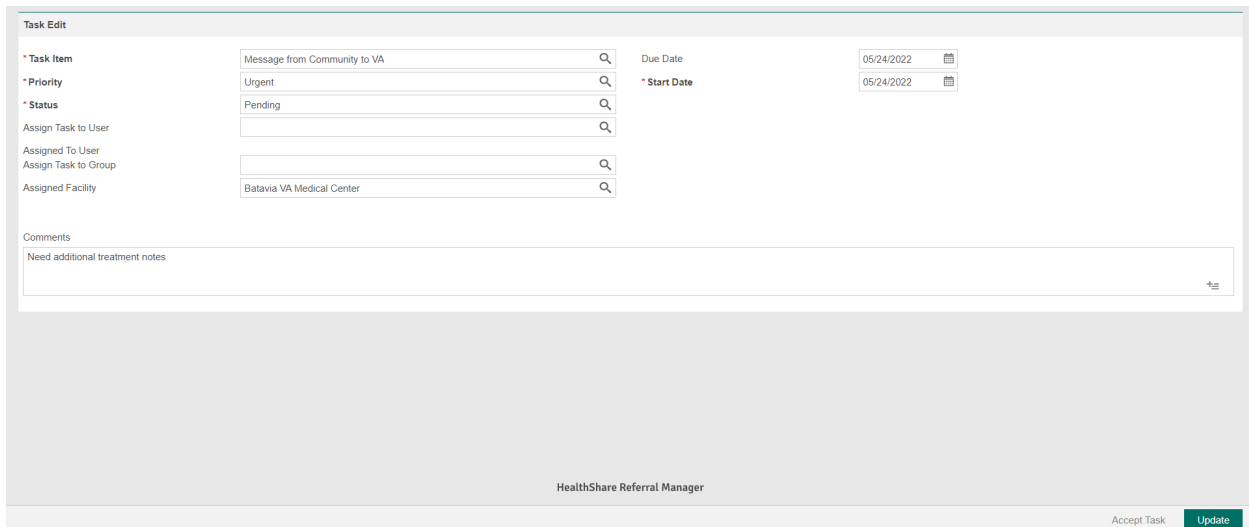
» *Note: The Action Menu icon **⋮** (also called link Referral List action menu by screen readers) is also available from the Referral Details screen in the Patient Banner.*



Figure 35: Action Menu – Add Task



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

Figure 36: Task Edit Screen



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

4.10.2 View or Edit a Task

The **Task List** displays all task items for the facility. From the **Task List**, users can review and edit an item.

To view the Task List:




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

Figure 37: Menu – Task List



Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MRI/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MRI/MRA	Sent	COMMUNITY MEDICAL CENTER	
01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

2. Locate the task on the **Task List**. Users can sort the Task List in the same way that they would sort the Referral List, by selecting the column headings or by sorting tasks with the Advanced Sort hyperlink.

Users can also filter their Task List to locate specific tasks. There are several filtering criteria, including Task Item, Date To/From, Last Name Start/End, Category of Care, Assigned User, Assigned Group, Assigned Facility, and more.

To filter the **Task List**:


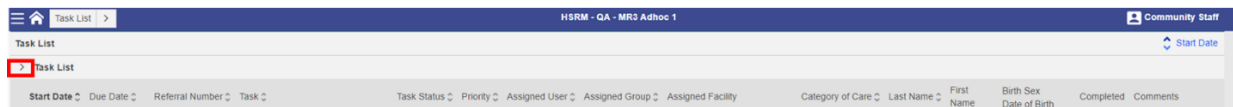
1. Select the arrow icon  at the top of the **Task List** to open the filtering options.

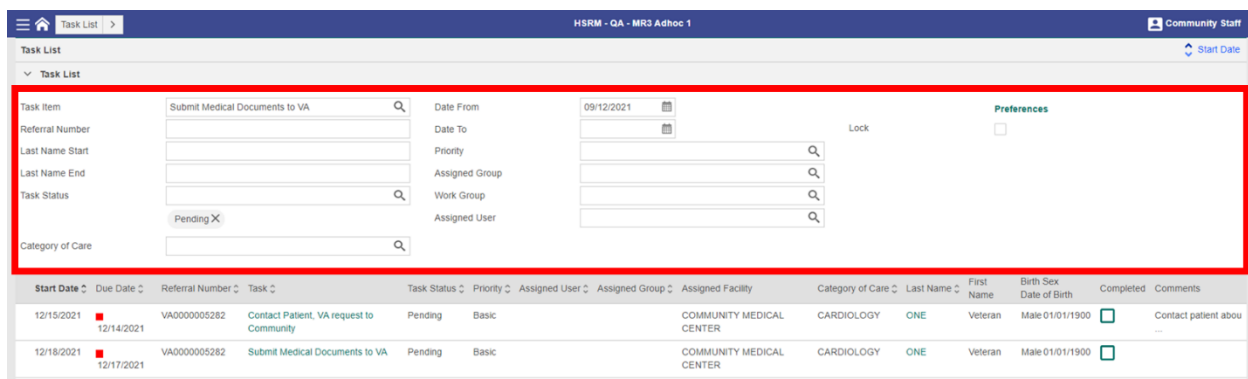
Figure 38: Task List Header Row



Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
------------	----------	-----------------	------	-------------	----------	---------------	----------------	-------------------	------------------	-----------	------------	-----------	---------------	-----------	----------

2. Enter the desired filtering criteria.

Figure 39: Task List Filters



Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
12/15/2021	12/14/2021	VA0000005282	Contact Patient, VA request to Community	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Contact patient about...
12/18/2021	12/17/2021	VA0000005282	Submit Medical Documents to VA	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	



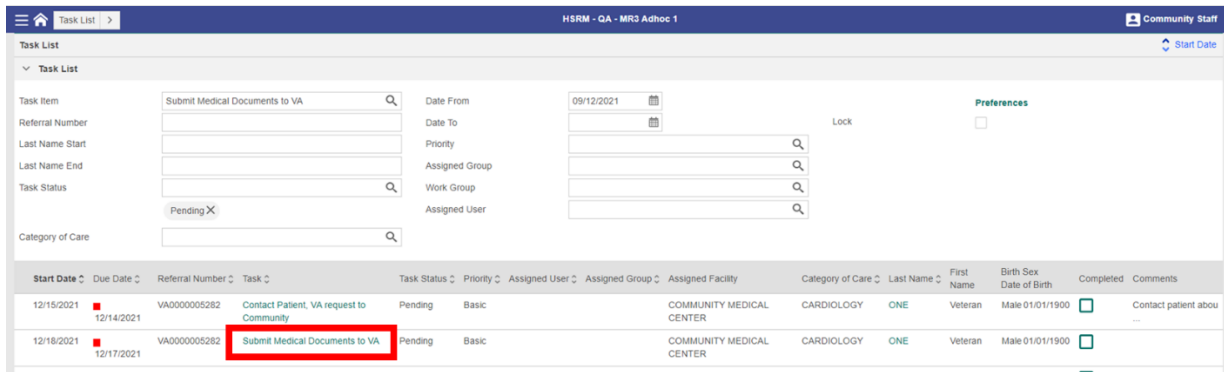
3. Select the **Find** button  to filter the Task List by the chosen criteria.

To view and edit a task:

1. Select the task title in the **Task** column to navigate to the **Task Edit** screen (data in the **Task** and **Last Name** columns are displayed as hyperlinks). The **Task Edit** screen appears.

» *Note: Overdue tasks have a red indicator in the Due Date column (screen readers read the date to indicate overdue tasks).*

Figure 40: Task List Screen




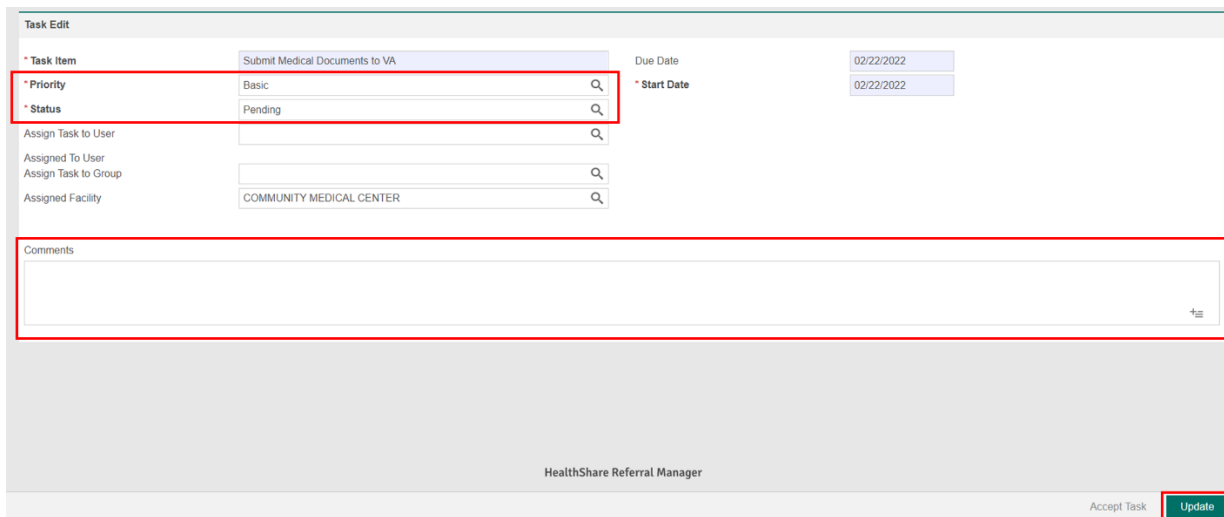
2. Review the task, including any comments.
3. Edit the **Priority** and **Status** fields as needed. To do this, select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) within each field and select the appropriate option.
4. Edit the **Comments** field.

Figure 41: Task Edit Screen




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



Figure 42: Task List

The screenshot shows the 'Task List' interface. At the top, there are search filters for 'Task Item', 'Referral Number', 'Last Name Start', 'Last Name End', 'Task Status', and 'Category of Care'. There are also date filters for 'Date From' and 'Date To', and a 'Priority' filter. A 'Pending X' button is visible. Below the filters is a table with columns: Start Date, Due Date, Referral Number, Task, Task Status, Priority, Assigned User, Assigned Group, Assigned Facility, Category of Care, Last Name, First Name, Birth Sex, Date of Birth, Completed, and Comments. The second row is highlighted with a red border.

Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
12/15/2021	12/14/2021	VA0000005282	Contact Patient, VA request to Community	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Contact patient about
12/18/2021	12/17/2021	VA0000005282	Submit Medical Documents to VA	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	
12/21/2021	12/21/2021	VA0000005282	Submit Medical Documents to VA	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	
12/21/2021	12/21/2021	VA0000005282	Review Medical Documents from VA	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	
12/22/2021	12/21/2021	VA0000005282	Submit Medical Documents to VA	Pending	Basic			COMMUNITY MEDICAL CENTER	CARDIOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	

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

Figure 43: Referral Details Screen

The screenshot shows the 'Referral Details' screen for a patient named 'ONE, Veteran' with DOB: 01/01/1900 and Age: 122 Yrs. The screen is divided into several sections:

- Referring Facility:** Bath VA Medical Center, Referring Facility Phone: 607-664-4000, Referring Facility Fax: 607-664-4861.
- Provisional Diagnosis:** R519 Headache, unspecified.
- Referral Date:** 09/01/2022.
- Referral Category:** Inpatient.
- Level of Care Coordination:** Moderate.
- Referral Expiration Date:** 02/28/2023.
- Service's Requested:** Category of Care: CARDIOLOGY; Service Requested: Cardiology Cath - PCI SEOC 1.1.10 PRCT REV.
- Authority:** Program Authority: Authorized/Pre-authorized VA Referral (not otherwise specified) - 1703; Estimated Cost of Care: 1,682.85.

7. When users update a task, they can mark the task as complete.

4.10.3 Mark a Task Complete

From the **Task List**, users can mark an item as complete.

To mark a task as complete:


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



Figure 44: Menu – Task List

The screenshot shows the U.S. Department of Veterans Affairs interface. On the left is a navigation menu with options: 'Find Referral by Patient', 'Find Referrals', 'Referral List', 'Task List' (highlighted with a red box), 'Reports', and 'Tools'. The main area displays a table of tasks with columns: Date of Birth, SSN, Service, Priority, Optional Task(s), Date Added, Referral Number, Category of Care, Status, Community Provider / Facility, and Appt Date. The table contains several rows of task data.

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

Figure 45: Task List Screen

The screenshot shows the 'Task List' screen. At the top, there are search filters for 'Task Item', 'Referral Number', 'Last Name Start', 'Last Name End', 'Task Status', and 'Category of Care'. Below the filters is a table with columns: Start Date, Due Date, Referral Number, Task, Task Status, Priority, Assigned User, Assigned Group, Assigned Facility, Category of Care, Last Name, First Name, Birth Sex, Date of Birth, Completed, and Comments. The 'Completed' column contains checkboxes. One checkbox is highlighted with a red box.

4.11 Community Provider Precertification

There may be occasions when a referral requires VA to call TPPs for precertification for patients who are VHA beneficiaries with other billable health insurance (OHI).

4.11.1 Identify Referrals Requiring OHI Precertification

If a referral requires OHI precertification, it will have either **PRCT REV** or **PRCT** listed in the SEOC name.

1. To view precertification details, select the row of the referral.



Figure 46: Referral Screen – SEOC

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
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA SEOC 1.0.8 PRCT REV	Routine	✓	09/13/2021	VA0000005281	RADIOLOGY MR/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SEOC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SEOC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MR/MRA	Sent	COMMUNITY MEDICAL CENTER	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	

4.11.2 View Precertification Instructions

Once on the **Referral Details** screen, community providers can view the precertification information on:

- » The **Service/s Requested** section, titled Precertification.
- » The **Offline Referral Form** under the Precertification section. Select the **Component Menu** (vertical ellipsis located top right of the screen), and, under **Print**, select **Offline Referral Form**.
- » The **Billing and Other Referral** Information sheet under the Precertification section. Select the **Component Menu**, then select **Billing and Other Referral Information** under **Print**.

Figure 47: Referral Details – Precertification Instructions

ONE, Veteran DOB: 01/01/1900 Age: 122 Yrs

Referral Details

*Referring Facility: Bath VA Medical Center *Provisional Diagnosis: R519 Headache, unspecified Referral Category: Inpatient

Referring Facility Phone: 607-664-4000 *Referral Date: 09/01/2022 Level of Care Coordination: Moderate

Referring Facility Fax: 607-664-4861 Clinically Indicated Date: 09/01/2022 Add/View Documents

*Referring Provider: Referral Expiration Date: 02/28/2023 Veteran's Medical Record

*Priority: Routine

Service/s Requested

Category of Care: CARDIOLOGY

*Service Requested: Cardiology Cath - PCI SEOC 1.1.10 PRCT REV

SEOC Details

This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above.

For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipsis action menu in the top right corner of this screen.

If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.

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/PRCT_requirements.asp

Please refer to the Billing and Other Referral information tab for details on the precertification requirements related to this approved referral and Veteran.

Authority

*Program Authority: Authorized/Pre-authorized VA Referral (not otherwise specified) - 1703 Estimated Cost of Care: 1,682.85

Apply Update

- » **Note:** The Precertification section instructs community providers to navigate to the Community Care website (https://www.va.gov/COMMUNITYCARE/providers/PRCT_requirements.asp) for further notification details. You can either copy and paste the text link into your web browser, or, if available, directly select the link to open the page.

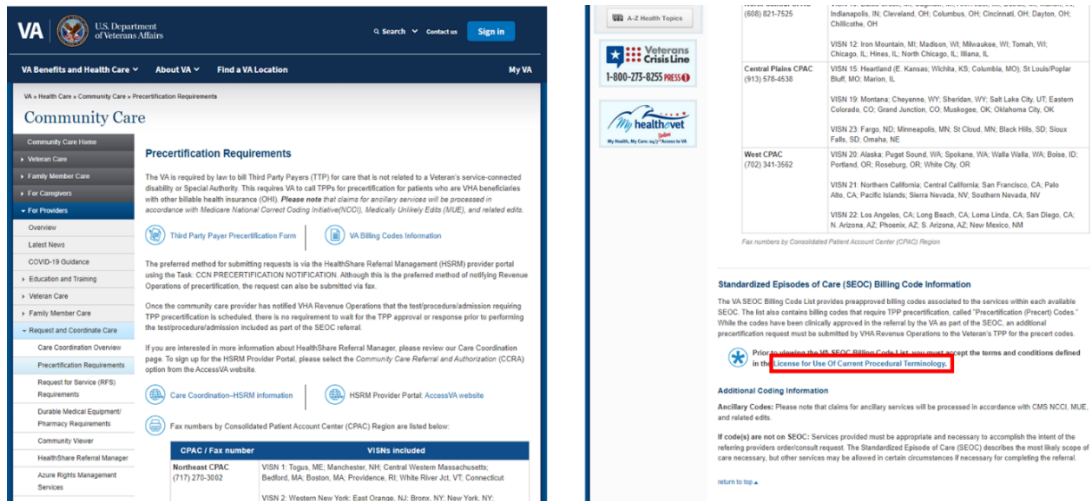


4.11.3 View Community Care Precertification Web Page

Once on the Community Care precertification web page, please read the precertification notification instructions.

1. To identify if a specific service requires precertification, scroll down to Standardized Episodes of Care (SEOC) Billing Code Information, and select the link titled **License for Use of Current Procedural Terminology**.

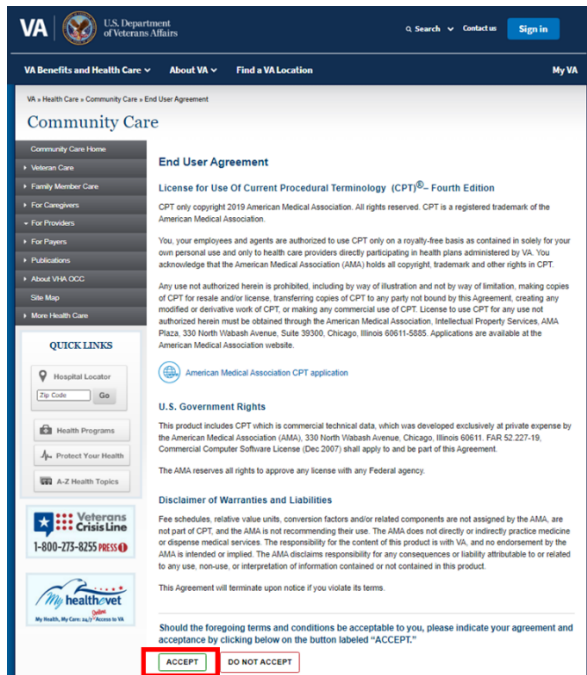
Figure 48: Community Care Precertification Requirements Web Page



2. Select **Accept** on the bottom of the **Community Care End User Agreement Web Page**. Selecting **Accept** will download the SEOC precertification code list to your computer.



Figure 49: Community Care End User Agreement Web Page – Accept



4.11.4 View SEOC Billing Codes for Precertification

Once you open the file titled “SEOC-PRCT_Code_List.xlsx” from your downloads, you will be able to identify which billing codes require precertification. Any billing codes in the **PRCT Billing Codes** column in red require precertification.

To locate a specific SEOC or billing code:

1. Use the CTRL+F keyboard shortcut to pull up the search option in Excel.
2. Enter either the specific SEOC name or billing code to locate it in the document.

» *Note: If a service requires precertification, you will need to create a manual task in HSRM for the Revenue team.*





3. Add comments to specify for which service and billing code number you are requesting the precertification, appointment date, diagnosis, and associated NPI number.
4. Save the changes. Remember, selecting **Update** saves the data and will only be available when all mandatory fields are complete.
5. Select **Update**.
6. VA Revenue staff members can now view the task. You may proceed with the service. There is no requirement to wait for VA or TPP approval or response prior to performing the test, procedure, or admission included as part of the SEOC referral.

Figure 52: Task Edit

The screenshot shows the 'Task Edit' interface. It features several input fields: 'Task Item' with 'Provider Precert Notification', 'Priority' with 'Basic', 'Status' with 'Pending', 'Due Date' with '01/06/2022', and 'Start Date' with '01/06/2022'. Below these are fields for 'Assign Task to User' (empty), 'Assigned To User' (RUR Nurse), 'Assign Task to Group' (empty), and 'Assigned Facility' (Togus VA Medical Center). A 'Comments' section contains the text: 'Requesting precertification of dialysis treatment (CPT 90935) schedule for January 5, 2022 to treat a diagnosis of chronic kidney disease- DX code N16.6, NPI: 0000000000'. At the bottom right, there are 'Accept Task' and 'Update' buttons. The footer of the form reads 'HealthShare Referral Manager'.

4.12 Canned Text

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

To create canned text:

1. Locate the referral (refer to 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 then select the Plus icon. This will take you to the Canned Text screen.
3. On the Canned Text screen, enter a code to assign to the text. Select the Update button at the bottom right to save the canned text.

4.13 Generate Reports

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

Table 1: Report Types

Report Type	Description
Download Request for Services (RFS) Form	This paper RFS form may be uploaded into HSRM.
HSRM Reports Reference Guide	This report provides VA staff and community providers with the definitions and uses of all reports that they have access to.
Veteran Appointments Report	This report displays all the appointments at a specified VA or community provider facility. It allows VA staff, VA supervisors, and community providers to review the recent and upcoming Veteran appointments that are scheduled in HSRM. Report fields include Appointment Date, Appointment Status, Level of Care Coordination, and Referral Details.

To run a report:


1. Select the **Menu** icon  (also called link menu for screen readers), select **Reports**, and choose **Veteran Appointments Report**.

Figure 53: Menu – Veteran Appointments Report



» *Note: The HSRM Reports Reference Guide option, located in Reports, provides directions and detailed information about the report.*

2. Select the criteria needed to run the desired report from the fields available and select the **Preview** icon (also called “link graphic link opens Excel in a new window graphic preview” by screen readers) to run the report.



Figure 54: Veteran Appointments Report

3. Navigate to the report. Reports may be generated in PDF format or as Excel documents, and users can print and save them.

4.14 Billing and Other Referral Information

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

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



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

Figure 55: Component Menu – Billing and Other Referral Information

3. The **Billing and Other Referral Information** sheet appears in a new browser tab and users can print, download, and save it as a PDF.




Figure 56: Component Menu – Billing and Other Referral Information Sheet

Billing and Other Referral Information	VA0000002306	Page 1 of 1
Billing and Other Referral Information	VA 	U.S. Department of Veterans Affairs
Referral Number: VA0000002306 Referring VA Facility: Batavia VA Medical Center		
Submitting Claims <u>ANY CLAIMS RELATED TO THIS EPISODE OF CARE MUST BE SUBMITTED TO OPTUM UNITEDHEALTH CARE AND INCLUDE THE APPROVED REFERRAL NUMBER.</u>		
Methods to submit claims: Electronic Data Interchange (EDI): Payer ID for Medical and Dental – VACCN		
More information on how to submit claims can be found by visiting https://www.va.gov/COMMUNITYCARE/revenue_ops/Veteran_Care_Claims.asp .		
Precertification The Standardized Episode of Care (SEOC) referral you have accepted includes certain services that require Third PartyPayer (TPP) precertification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has Other Health Insurance (OHI), so that VA can notify the TPP. VHA is required by law to bill the TPP for care that is not for a Service Connection or Special Authority eligibility.		

5 Clinical Viewer

The **Clinical Viewer** portal offers users a comprehensive view of a Veteran’s medical documentation history in HSRM. Categories of information available in Clinical Viewer include a clinical summary of the patient’s history, allergies, immunizations, any medications, lab results, procedures, and more. Clinical Viewer gives HSRM users a secure, centralized source of medical history and patient details for a Veteran in HSRM.

Clinical Viewer is accessible from the **Referral Details** screen for any Veteran that has relevant data in the system. To access Clinical Viewer from the **Referral Details** screen, users can either select the **Clinical Viewer** icon  on the **Patient Banner** or follow the **Veteran’s Medical Record** link in the **Referral Details** section.

To access Clinical Viewer:


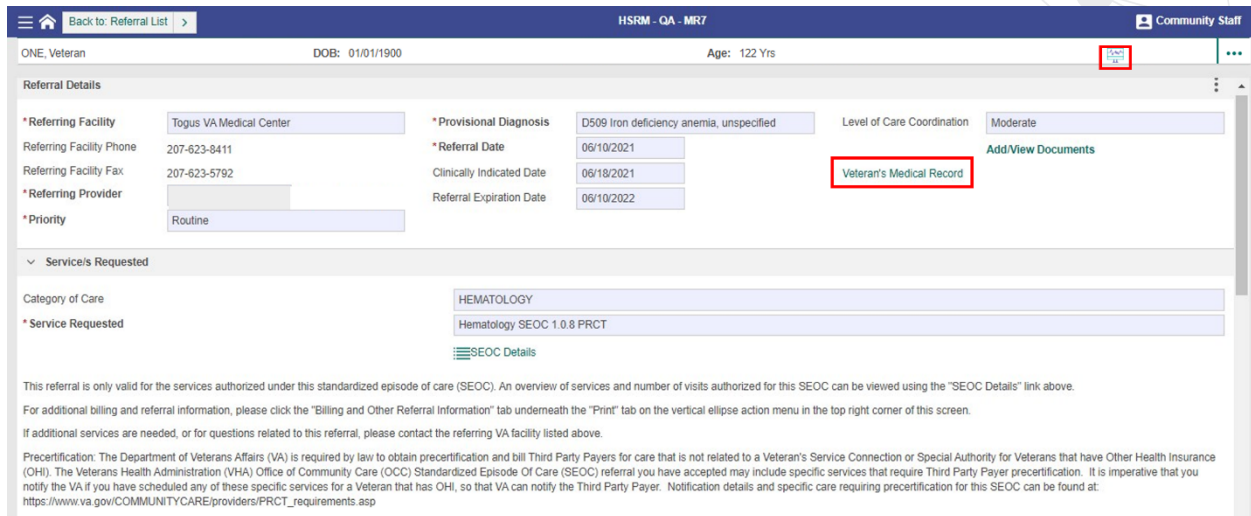
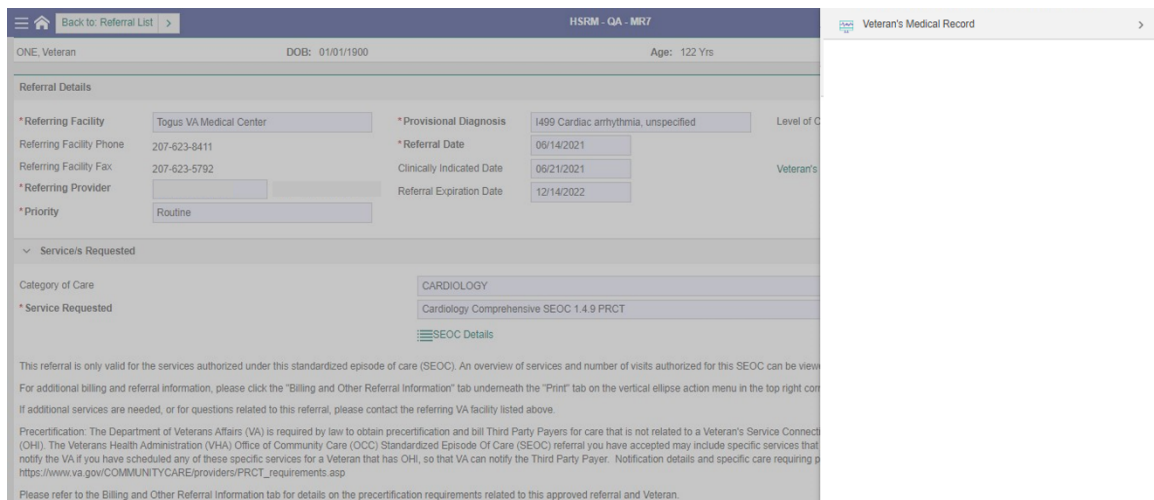
1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Clinical Viewer** icon  on the **Patient Banner** or the **Veteran’s Medical Record** link on the **Referral Details** screen.

Figure 57: Referral Details Screen



- If the user selects the **Clinical Viewer** icon, a menu will open. Select the **Veteran's Medical Record** option. Alternatively, if the user selects the **Veteran's Medical Record** link in the Referral Details portion of the screen, it will bypass the menu and take them directly to Clinical Viewer.

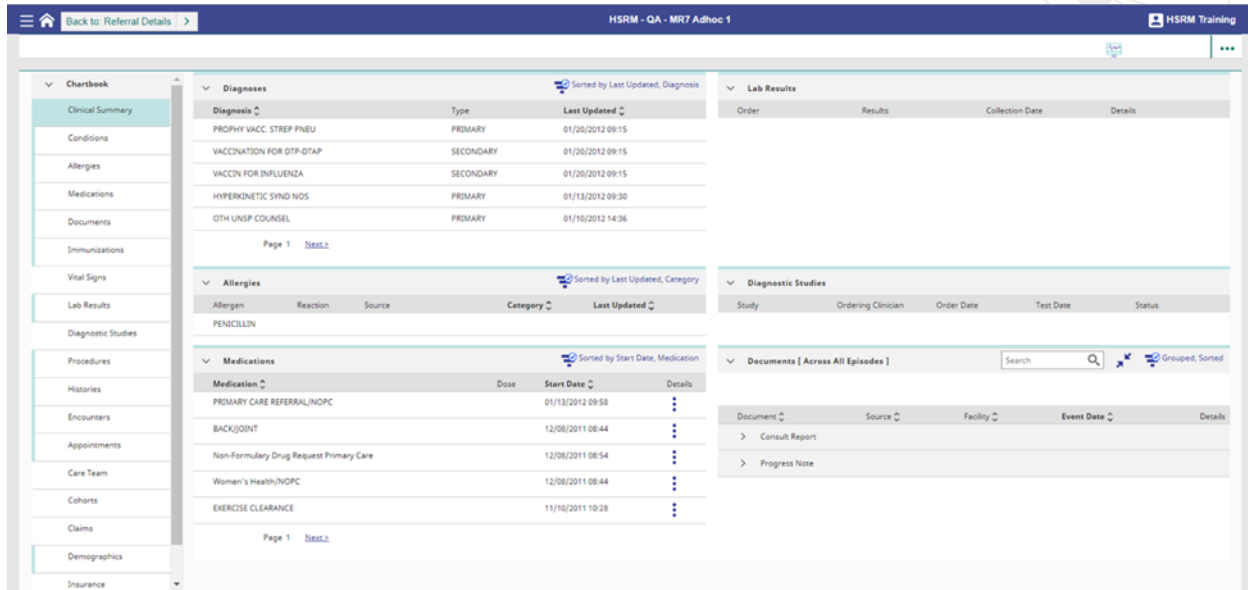
Figure 58: Clinical Viewer Access Menu



- The Clinical Viewer page will open, displaying patient medical history in HSRM. The categories of information available for viewing are in a list called the **Chartbook**. Select one of the categories in the Chartbook to view it.



Figure 59: Clinical Viewer Home Screen



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

6 Additional Resources

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

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

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



Appendix A: Acronyms and Abbreviations

Table 2: Acronyms and Abbreviations

Acronym or Abbreviation	Definition
Admin	Administrator
C6	Community Care Clinical Coordination Contact Center
CBOC	Community-Based Outpatient Clinic
CCN	Community Care Network
EDIPI	Electronic Data Interchange Personal Identifier
EOC	Episode of Care
HIE	Health Information Exchange
HSRM	HealthShare Referral Manager
ICN	Integration Control Number
IT	Information Technology
NPI	National Provider Identifier
OHI	Other Health Insurance
OS	Operating System
PDF	Portable Document Format
PII	Personally Identifiable Information
PPMS	Provider Profile Management System
RFS	Request for Services
RUR	Revenue Utilization Review
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
TPA	Third-Party Administrator
TPP	Third-Party Payer
TRAIN	Training Finder Real-time Affiliate Integrated Network
VA	U.S. Department of Veterans Affairs
VAMC	Veterans Affairs Medical Center
VHA	Veterans Health Administration
VISN	Veterans Integrated Service Network

Appendix B: Revision History Table

Table 3: Revision History Table

Version	Date	Author	Description
0.1	Nov. 2018	CCRA Training Team	Initial Draft
0.2	Nov. 2018	Sam Weaver	QC Review
0.3	Nov. 2018	Jennifer Cote	JPM/PQAL Review
0.4	Nov. 2018	Susan Burke	PM Review
0.5	01/14/2019	Sam Weaver	Template Update
0.6	01/14/2019	Jennifer Cote	JPM/PQAL Review
1.0	01/14/2019	Susan Burke	PM Review
1.1	03/25/2019	Allyson Newman	<p>Updates from 4.0</p> <ul style="list-style-type: none"> » New screenshots throughout » Alt Text added » Updated TOC » Updated Table of Figures » Updated Table of Tables » Text updates throughout » Added Section 3.1.2: Billing and Other Referral Information » Added screenshot of Component Menu with Billing and Other Referral Information option highlighted » Added screenshot of Billing and Other Information Sheet » Updated HSRM Help Desk phone number and TTY number
1.2	03/27/2019	Kathryn Hooker	<p>QC Review</p> <ul style="list-style-type: none"> » Title page: Changed date to April 2019 and Version to 2.0; removed HSRM acronym » Footer: Changed to Arial font » Intro: Updated to mandatory version » Appendix A: Added acronyms » Throughout doc: <ul style="list-style-type: none"> • Edited alt text for brevity • Made minor changes to grammar and punctuation
1.3	05/08/2019	Jennifer Cote	JPM/PQAL Review

Version	Date	Author	Description
1.4	06/13/2019	Allyson Newman	<p>Updates for Build 6.0</p> <ul style="list-style-type: none"> » New screenshots throughout » Expanded Requests for Services section with screenshots » Updated TOC » Update Table of Figures » Updated Table of Tables » Text updates throughout » Minor punctuation » Added a report
1.5	06/17/2019	Rachael Levine	Training Team Lead Review
1.6	06/17/2019	Allyson Newman	<ul style="list-style-type: none"> » Updates to screenshots, text. » Added Alt text
1.7	06/17/2019	Jennifer Cote	JPM/PQAL Review
2.0	06/17/2019	Susan Burke	Program Manager Review
2.1	06/21/2019	Allyson Newman	Added PPMS Provider Search
2.2	06/24/2019	Kathryn Hooker	QC review of updates
2.3	06/24/2019	Jennifer Cote	JPM/PQAL Review
3.0	08/13/2019	Allyson Newman	<p>Updates for Build 7.0</p> <ul style="list-style-type: none"> » New screenshots throughout » Text updates throughout » Updated TOC » Updated Table of Figures » Updated Table of Tables » Updated Resource links » Updated footer with date » Updated Getting Access to HSRM section » Updated alt text
3.1	08/22/2019	Staci Shelley	QC Review
4.0	03/02/2020	Allyson Newman	<p>Updates for Build 7.5</p> <ul style="list-style-type: none"> » Updated footer » Spelling and grammar revisions » Removed Provider Search and Additional Details section » Updated alt text » Updated screenshots » Updated Table of Contents » Updated Table of figures



Version	Date	Author	Description
4.1	04/28/2020	Janay Hurley	Updates for Build 8.0 » Updated Figure 5 » Updated alt text for figure 5 » Updated footer
4.2	04/29/2020	Jennifer Defreitas	Manager Review
4.3	04/29/2020	Kathryn Hooker	QC Review » Updated intro text and Appendix A » Verified links and alt text throughout
4.4	04/30/2020	Jennifer Cote	JPM/PQAL Review
5.0	05/01/2020	Susan Burke	Program Manager Review
5.1	05/26/2020	Sara Zarny	Updates for Release 9.0 » Updated Figure 32 » Updated alt text for Figure 32 » Updated Figure 34 » Updated alt text for Figure 34 » Updated Figure 37 » Updated alt text for Figure 37 » Updated footer
5.2	05/29/2020	Janay Hurley	Training Team Lead Review
5.3	06/03/2020	Kathryn Hooker	QC review of updates
5.4	06/05/2020	Jennifer Cote	JPM/PQAL Review
6.0	06/07/2020	Susan Burke	Program Manager Review
6.1	07/30/2020	Allyson Newman	Updates for Release 10.0 » Updated version number and date » Updated footer » Updated Figure 5 » Updated Figure 9 » Updated Figure 16 » Updated Figure 17 » Updated Figure 20 » Updated Figure 32 » Updated Figure 33 » Updated Figure 35 » Updated Figure 37 » Updated Figure 39 » Updated alt text throughout » Updated Table of Contents » Updated Table of Figures » Updated Table of Tables
6.2	08/11/2020	Rammy Sbeitan	Final QA Review



Version	Date	Author	Description
6.3	08/17/2020	Allyson Newman	<ul style="list-style-type: none"> » Updated Figure 9 » Updated Figure 6 » Updated Figure 12 » Updated Figure 19 » Updated Figure 22 » Updated Figure 24
6.4	08/17/2020	Sara Zarny	Training QA Review
6.5	08/17/2020	Janay Hurley	Training Team Lead Review
6.6	08/17/2020	Kathryn Hooker	QC Review
6.7	08/20/2020	Jennifer Defreitas	Training Manager Review
6.8	08/21/2020	Jennifer Cote	JPM/PQAL Review
8.0	09/09/2020	Susan Burke	Program Manager Review
8.1	10/26/2020	Allyson Newman	Updates for Release 11.0 <ul style="list-style-type: none"> » Replaced Figure 18 and added alt text » Replaced Figure 19 and added alt text » Updated text throughout » Updated Table of Contents » Updated Table of Figures » Updated Table of Tables
8.2	11/04/2020	Kathryn Hooker	QC review of updates
8.3	11/16/2020	Jennifer Defreitas	Manager Review
8.4	11/17/2020	Jennifer Cote	JPM/PQAL Review
9.0	11/18/2020	Susan Burke	Program Manager Review
9.1	01/22/2021	Connor Reed	Technical Writer Review <ul style="list-style-type: none"> » Updated title page to reflect Release 12.0 with no changes » Updated footer to reflect version review and review date
9.2	03/10/2021	Jennifer Cote	JPM/PQAL Review
10.0	03/12/2021	Susan Burke	Program Manager Review
10.1	05/25/2021	Allyson Newman	Updates for Release 13.0 <ul style="list-style-type: none"> » Updated text throughout » Updated Figure 2 » Updated Figure 3 » Updated Figure 4 » Updated Figure 5 » Updated Figure 12 » Updated Figure 38 » Updated Figure 41 » Updated Table 1



Version	Date	Author	Description
10.2	06/09/2021	Connor Reed	QA Review for Release 13 Updates » Reviewed and updated all screenshots for PII/Privacy » Updated Figure 10 » Updated Figure 21 » Updated Figure 22 » Updated Figure 24 » Updated language throughout » Included note about C6 referrals » Added Section 6: Clinical Viewer » QA of updates » 508 Compliance review
10.3	07/07/2021	Yasir Hashmi	Manager Review
10.4	07/12/2021	Kathryn Hooker	QC Review
10.5	07/16/2021	Jennifer Cote	JPM/PQAL Review
11.0	07/27/2021	Susan Burke	Program Director Review
11.1	08/02/2021	Connor Reed	Updated Clinical Viewer Figures 42, 43, 44
11.2	08/02/2021	Kathryn Hooker	QC Review
11.3	08/02/2021	Jennifer Cote	JPM/PQAL Review
12.0	08/02/2021	Susan Burke	Program Director Review
12.1	09/10/2021	Allyson Newman	Updates for Release 14.0 » Updated text throughout » Updated Figures 16, 17, 18, 19, 20, 31, 36, and 38 and updated alt text
12.2	09/13/2021	Connor Reed	QA of Release 14.0 Updates » Inserted Figures 5 and 6 » Updated Veteran Appointment Preference Language » Inserted Section 4.1.3 » Updated TOC and TOE
12.3	09/16/2021	Yasir Hashmi	Manager Review
12.4	09/20/2021	Lorelei Cox	Project Manager Review
12.5	09/20/2021	Kathryn Hooker	QC Review
12.6	09/23/2021	Jennifer Cote	JPM/PQAL Review
12.7	09/24/2021	Jennifer Parker	DPM Review
13.0	10/08/2021	Susan Burke	Program Director Review
13.1	12/08/2021	Allyson Newman	Initial review of updates needed for 15.0 » Updated text and added comments



Version	Date	Author	Description
13.2	12/13/2021	Allyson Newman	Updates for Release 15.0 » Updated Figures 2, 3, 20, and 21 » Updated text throughout
13.3	12/16/2021	Connor Reed Allyson Newman	Updates for Release 15.0 » Added section 13 about precertification process » Updated Figure 4 » Updated text
13.4	12/22/2021	Yasir Hashmi	Manager Review
13.5	12/27/2021	Lorelei Cox	Project Manager Review
13.6	12/28/2021	Kathryn Hooker	QC Review
13.7	12/29/2021	Jennifer Cote	JPM/PQAL Review
14.0	01/17/2022	Susan Burke	Program Director Review
14.1	03/03/2022	Allyson Newman	Initial review of updates for 16.0
14.2	03/03/2022	Allyson Newman	Updates for Release 16.0 » Updated Figures 7 and 11
14.3	03/07/2022	Connor Reed	Updates for Release 16.0 » Added the Find Referral by Patient Section
14.4	03/21/2022	Lorelei Cox	Project Manager Review
14.5	03/23/2022	Kathryn Hooker	QC review of updates
14.6	03/25/2022	Jennifer Cote	Project Manager – PMO Review
15.0	04/05/2022	Susan Burke	Program Director Review
15.1	05/13/2022	Allyson Newman	Initial review of updates for 17.0
15.2	05/16/2022	Allyson Newman	Updates for Release 17.0 » Updated date and Release no. » Updated Figures 14, 23, 24 » Updated text throughout
15.3	05/27/2022	Connor Reed	QC of Release 17.0 updates, privacy edits, and 508 compliance validation
15.4	05/27/2022	Yasir Hashmi	Manager Review
15.5	05/31/2022	Lorelei Cox	Project Manager Review
15.6	06/02/2022	Kathryn Hooker	QC review of updates
15.7	06/03/2022	Jennifer Cote	Project Manager – PMO Review
16.0	06/22/2022	Susan Burke	Sr. Program Director Review
16.1	09/08/2022	Allyson Newman	Updates for Release 19.0 » Updated text throughout » Updated Figures 2-7, 10, 11, 13, 14, 18, 20, 23, 24, 26, 30, 32, 34, 36, 40, 41, 43, 44, 48, 50, 52, 54, and 56



Version	Date	Author	Description
16.2	09/12/2022	Connor Reed	Review of updates for Release 19.0
16.3	10/03/2022	Lorelei Cox	Project
16.4	10/05/2022	Kathryn Hooker	QC review of updates
16.5	10/25/2022	Allyson Newman	Updated screenshots with new CV icon throughout
16.6	10/26/2022	Connor Reed	Review of updates
16.7	11/14/2022	Kathryn Hooker	QC Review
16.8	11/15/2022	Jennifer Cote	PMO Project Manager Review
17.0	11/17/2022	Susan Burke	Sr. Program Director Review

