RESOURCE AND PATIENT MANAGEMENT SYSTEM

Referred Care Information System
(BMC)

Addendum to User Manual

Version 4.0 Patch 7
April 2011

Office of Information Technology (OIT)
Division of Information Resource Management
Albuquerque, New Mexico
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1.0 Introduction

1.1 Summary of Changes

- Addition of Referred Care (RCIS) component to Electronic Health Record (EHR) Application.
- Additional server side components and routines for the new RCIS–EHR Interface.
- New Report–Added report option to print the referrals that do not have a C32 printed.
- New Vendor Option–Addition of the vendor fax and e-mail address to the Edit Vendor option.
- New General Retrieval Options–Added ability to search by a patient’s veteran status

1.2 Patch 7 (RPMS Updates)

1.2.1 Edit Vendor Options–E-mail Address and Fax Number

Two additional fields were added under the VEN–Provider/Vendor data menu option. These can be used to enter and edit a vendor’s e-mail address and fax number.

The fax number will be available for display on a Contract Health Service (CHS) Purchase Order (refer to the ACHS version 3.0 patch 19 documentation for more information)

**Note:** Editing vendor records is a supervisory function in the MIS. Area Offices should assume and maintain the function of vendor updates for area-wide standardization.

1. Select VEN–Provider/Vendor data

*INFORMATION SYSTEM*
2. Enter the name of the vendor to update.

3. Enter Y and field number 11 to add or edit the vendor’s e-mail address.

4. Enter Y and field number 13 to add or edit the vendor’s fax number.
9) Medicare Provider: No entry
10) BPA: NONE
11) E-Mail: 
12) DUNS: 

**** MAILING/BILLING ADDRESS ****
13) Street: 123 STREET AVE
    City: ALBUQUERQUE
    State: NEW MEXICO
    Zip: 87111
    Phone: 
    Fax:
    Attn: 

**** PROVIDER LOCATION ADDRESS ****
14) Street: 
    City: 
    State: 
    Zip Code: 

Want to Edit? NO// YES

Change Which Item: (1-17): 13
MAILING ADDRESS-STREET: MED ARTS BLDG, 10TH & HORNE
Replace
MAILING ADDRESS-CITY: TOPEKA/
MAILING ADDRESS-STATE: KANSAS/
MAILING ADDRESS-ZIP: 66606/
MAILING ADDRESS-ATTENTION: 
MAILING ADDRESS-PHONE: 
MAILING ADDRESS-FAX: 505-888-8181

Figure 1-4: Entering the vendor’s fax number

1.2.2 General Retrieval Report–Veteran Option

The Veteran option has been added to the list of selection items to search, sort by, and print on a General Retrieval report. (Refer to Option 96 in Figure 1-5.)
1.2.3 New Report–Active Referrals without a Printed C32

This patch includes an additional report that provides a list of referral documents for which a C32 Summary of Care Record has not been printed. This was added to assist with a Stage 1 Meaningful Use requirement for eligible providers (EPs), eligible hospitals, and critical access hospitals (CAH) to provide a Summary of Care Record (C32 report) for patients referred outside of the issuing Indian Health Service (IHS) facility.

This requirement is one of 10 available menu set objectives as defined for EHR Certification. Please visit the official Web site for a complete list of these and other requirements (http://www.cms.gov/ehrincentiveprograms/).

1. The new Report is located under the RPT–Print Reports menu option.

2. Select ADM–Administrative Reports
3. Select **ARC – Active Referrals** without a Printed C32 from the menu options.

4. Select a beginning date range to view referrals without a printed C32 record.

This report prints out a list of Active referrals that a C32 has not been printed for.
Report will include Primary and Secondary Referrals.

Enter beginning Referral Date: 3/1/2010 (MAR 01, 2011)

Select one of the following:

P  PRINT Output
B  BROWSE Output on Screen

Do you wish to: P// RINT Output
DEVICE: HOME// VIRTUAL TERMINAL Right Margin: 80//

Figure 1-8: Selecting a beginning date range

5. The report will display the Referral document number, Patient Name, and the Date the referral was initiated.

Figure 1-9: Patient information displays (Page 1)

********** CONFIDENTIAL PATIENT INFORMATION **********
DEMO INDIAN HOSPITAL

Page 1
ACTIVE REFERRALS WHERE A C32 HAS NOT BEEN PRINTED
BEG DATE: MAR 01, 2011 END DATE: MAR 10, 2011

<table>
<thead>
<tr>
<th>REFERRAL #</th>
<th>PATIENT NAME</th>
<th>REFERRAL DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5059011100132</td>
<td>DEMO, PATIENT LADY</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100133</td>
<td>DEMO, PATIENT LADY</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100134</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100134A1</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100135</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100135A1</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100136</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
</tbody>
</table>

Press any key to continue:

Figure 1-9: Patient information displays (Page 1)

********** CONFIDENTIAL PATIENT INFORMATION **********
DEMO INDIAN HOSPITAL

Page 2
ACTIVE REFERRALS WHERE A C32 HAS NOT BEEN PRINTED
BEG DATE: MAR 01, 2011 END DATE: MAR 10, 2011

<table>
<thead>
<tr>
<th>REFERRAL #</th>
<th>PATIENT NAME</th>
<th>REFERRAL DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5059011100135A2</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
<tr>
<td>5059011100136A1</td>
<td>DEMO, PATIENT REFERRAL</td>
<td>3/1/11</td>
</tr>
</tbody>
</table>
1.3 Referred Care Component in EHR

1.3.1 Referral Tab–Patient Centric

The EHR–Referred Care component is for the clinical management of referred care to in-house services, other IHS facilities, and outside contract providers. This information is stored in the RPMS Referred Care Information System (RCIS) application and is also used by CHS. To access this tab, log into the EHR application and select a patient in the Patient Chart.

1.3.1.1 Add New Referral

The following steps show you how to create a new referral. A patient must be selected to begin this process. There are two options available for creating a new referral:

- Add New Referral–Information is entered on a blank form.
- Add Mini Referral–Form fields are prepopulated based on the selected referral template.

1. Open the Referral tab within the Patient Chart area.
2. To use an RCIS referral template, click Add Mini Referral located below the patient information (yellow box). A list of referral templates from the RCIS application will be displayed in a dialog box.

3. Select a referral template and click OK to continue to the data entry form.

4. Click Add Referral to enter information on a blank form.
5. Enter patient information or edit the prepopulated fields as needed.

6. Select additional documents that will be sent with the patient by selecting the boxes in the **Include** field. (Refer to Figure 1-13.)

![Include field used to select additional documents](image)

7. The **Medical History and Findings** field is a free text field. The user can type in their notes (i.e., diagnosis and other pertinent medical information) and/or make multiple selections from the health summary list on the right to enter additional medical information (refer to Figure 1-14).

![Medical History and Findings field](image)
8. Click **Save** when complete. This will create a new referral number.

9. Click **Cancel** to exit without saving.

**1.3.1.2 Add Secondary Referral**

1. Open the **RCIS** tab within the **Patient Chart** area.

2. Select an existing referral from the Table List view. Select a primary referral in order to add a secondary referral. A primary referral is identified by referral numbers without a suffix (i.e. A1, A2, etc.).

3. Click **Add Secondary Referral**. The referral form will display with the available information from the primary referral.

4. Enter new information or edit the prepopulated fields as needed.

5. You can also create a Call-In referral in this screen if the patient was sent for other services to another provider outside the designation of the original referral.

6. Click **Save** when complete. This will create a suffix at the end of the existing referral number (i.e. #  - A1).
7. Click **Cancel** to exit without saving.

### 1.3.1.3 View or Edit Existing Referrals by Patient

Make sure that a patient has been selected.

1. Open the **RCIS** tab within the **Patient Chart** area.

2. A list of the referral documents for the selected patient will display in a table format.

3. Click on the column headers to sort by each column.

4. To view or edit an existing referral, select a referral document from the table view.

5. You can either double-click the selection or click **Edit Referral** above the table view to open the highlighted referral document.

6. Enter new information or edit the prepopulated fields as needed.

The referral status displays as seen below (highlighted in red) with the status of the referral (i.e., Approved, Denied, Pending, etc.) (Refer to Figure 1-16.)

![Edit Referral Form Screen](image-url)
7. Click **Append Medical History** to add additional Health Summaries and/or comments. You can make multiple selections from the menu on the right and they will appear in ascending order in the **Free Text** field. Comments can be added before or after the Health Summaries selected. (Refer to Figure 1-15)

Figure 1-18: **Append Medical History and Findings** window

8. Click **Save** when complete.

9. Click **Cancel** to exit without saving.

### 1.3.2 RCIS Tab–Provider Centric

The **RCIS–Provider Centric** tab provides the EHR user with access to all referrals you created within a selected date span. All referrals created by the current user as the Referring Provider can be viewed and edited from this area.

1. Select the **RCIS** tab located at the top of the screen with the **Patient Chart** tab.
2. A list of referrals created for the current user will display in a table view.

3. Referral document can be viewed and edited in the same way as the Patient Chart Referral tab.

4. An Edit Referral and Add Secondary Referral button have been provided with the same functions as in the Patient Chart Referral tab.

5. A default date range is provided to view referrals created within a specified date range. You can choose to edit the date range.

6. Click on the column headers to sort by each column.

1.4 C32 Reporting Requirement

In the Patient Chart–Referrals tab and the Provider Centric–RCIS tab, a Print C32 for referral button is provided above the table view. This was added to assist with a Stage 1 Meaningful Use requirement for eligible providers (EPs), eligible hospitals and critical access hospitals (CAHs) to provide a Summary of Care Record (C32 report) for patients referred outside of the issuing IHS facility.

This requirement is one of 10 available menu set objectives as defined for EHR Certification. Please visit the official Web site for a complete list of these and other requirements (http://www.cms.gov/ehrincentiveprograms/).

To complete the printing of a Summary of Care Report:

1. Select an existing referral from the Referrals tab.
2. Click Print C32 for Referral to view a pop-up window of the report (refer to Figure 1-19).

3. Click Print to complete the requirement. Once complete, the referral document is marked as having a C32 report printed.

Figure 1-20: Sample C32 Report
Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

**Phone:** (505) 248-4371 or (888) 830-7280 (toll free)
**Fax:** (505) 248-4363
**Web:** [http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm](http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm)
**E-mail:** support@ihs.gov