



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**

```

*****
*          INDIAN HEALTH SERVICE          *
*    REFERRED CARE INFORMATION SYSTEM    *
*          VERSION 4.0, Patch 7          *
*****
          DEMO INDIAN HOSPITAL
          MAIN MENU

DE      Data Entry ...
RPT     Print Reports ...
MGT     RCIS Management ...
    
```

```

SPEC   RCIS Special Print Menu ...
VEN    Provider/Vendor data

Select Referred Care Information System Option: VEN
    
```

Figure 1-1: The VEN option

2. Enter the name of the vendor to update.

```

PROVIDER/VENDOR UPDATE

*****
Enter Provider/Vendor: DEMO MD,VENDOR
    
```

Figure 1-2: Entering the vendor name

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

```

PROVIDER/VENDOR UPDATE

*****
1) DEMO MD,VENDOR                2) EIN No: 1488999513
3) Status: ACTIVE                4) Contracts: NONE
5) UPIN:                          6) Rate Quotation: NONE ACTIVE
7) Type of Business:            8) Agreement: NONE
9) Medicare Provider: No entry  10) BPA: NONE
11) E-Mail:                      12) DUNS:

**** MAILING/BILLING ADDRESS ****      **** PROVIDER LOCATION ADDRESS ****
13) Street: 123 STREET AVE            14) Street:
    City: ALBUQUERQUE                  City:
    State: NEW MEXICO      Zip: 87111    State:
    Phone:                  Fax:        Zip Code:
    Attn:

15) Vendor Type: PHYSICIAN            16) Fed/Non-Fed:
17) Specialty:                        18) Geographic Loc:
*****

Want to Edit? NO// YES

Change Which Item: (1-17): 11
E-MAIL ADDRESS: PROVIDER.DEMO@IHS.GOV
    
```

Figure 1-3: Entering the vendor's e-mail address

4. Enter **Y** and field number **13** to add or edit the vendor's fax number.

```

PROVIDER/VENDOR UPDATE

*****
1) DEMO MD,VENDOR                2) EIN No: 1488999513
3) Status: ACTIVE                4) Contracts: NONE
5) UPIN:                          6) Rate Quotation: NONE ACTIVE
7) Type of Business:            8) Agreement: NONE
    
```

```

9) Medicare Provider: No entry
11) E-Mail:
10) BPA: NONE
12) DUNS:

**** MAILING/BILLING ADDRESS ****      **** PROVIDER LOCATION ADDRESS ****
13) Street: 123 STREET AVE              14) Street:
    City: ALBUQUERQUE                    City:
    State: NEW MEXICO                     State:
    Phone:                               Zip: 87111
    Attn:                               Zip Code:
    Fax:
15) Vendor Type: PHYSICIAN              16) Fed/Non-Fed:
17) Specialty:                          18) Geographic Loc:
*****

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.)

```

RCIS GENERAL RETRIEVAL      Apr 05, 2011 09:13:49      Page: 2 of 3
REFERRAL Search Menu
Referrals can be selected based upon any of the following items. Select
as many as you wish, in any order or combination. An (*) asterisk indicates
items already selected. To bypass screens and select all referrals hit Q.
+
15) Closed By User          49) Alt Res Ltr Date      83) Alternate Resource-C
16) Date User Created       50) Alt Res Ltr Dissem   84) Alt Resource Date
17) Date Last Modified     51) Alt Res Ltr User     85) Alt Resource User
18) Type of Referral       52) Expected Begin DOS  86) 72-Hr Notification
19) Requesting Facility    53) Best Avail Begin DOS 87) 72-Hr Date
20) Requesting Provider    54) Actual Begin DOS    88) 72-Hr User
21) Status of Referral    55) Best Avail END DOS  89) W/I Medical Priority
22) Next Review Date      56) Actual END DOS      90) W/I Med Priority Use
23) Case Manager          57) Expected End DOS    91) W/I Med Priority Dt
24) Inpatient/Outpatient  58) Best Avail Inpt LOS  92) Sec. Prov Name
25) Primary Vendor        59) Actual Inpt LOS     93) Sec. Prov Appt Dt
26) IHS Facility Refer T  60) Best Avail DRG      94) Sec. Prov User Creat
27) Clinic Referred To    61) Final DRG          95) Sec. Prov Init Dt
28) To Specific Provider  62) Date Dsch Summary Re 96) Veteran
+
Enter ?? for more actions
S  Select Item(s)          +  Next Screen              Q  Quit Item Selection
R  Remove Item(s)         -  Previous Screen          E  Exit Report
Select Action: S//
    
```

Figure 1-5: General Retrieval Report Options

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**

```

*****
*          INDIAN HEALTH SERVICE          *
*    REFERRED CARE INFORMATION SYSTEM    *
*          VERSION 4.0, Patch 7          *
*****
          DEMO INDIAN HOSPITAL
          Print Reports
    
```

```

ADM  Administrative Reports ...
CM   Case Management Reports ...
UTIL Utilization Reports ...
GEN  RCIS General Retrieval
DGR  Delete General Retrieval Report Definition

Select Print Reports Option: ADM  Administrative Reports
    
```

Figure 1-6: The ADM option

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

```

*****
*          INDIAN HEALTH SERVICE          *
*    REFERRED CARE INFORMATION SYSTEM    *
*          VERSION 4.0, Patch 7          *
*****
          DEMO INDIAN HOSPITAL
          Administrative Reports

ARD  Active Referrals by Date
ARR  Active Referrals by Referred To
ARP  Active Referrals by Requesting Provider
CHPD  CHS Paid
ARC  Active Referrals without a Printed C32
CHSR  CHS Status Report for Referrals
INHC  Tally of In-House Referrals by Clinic
INHP  Tally of In-House Referrals by Requesting Provider
INHR  In-House Report for Active Referrals
OUT  Referrals at an Outside Facility (Call In's)
RRR  Referral Review Report - By Time Period
RRRF  Referral Review Report - By Facility/Time Period
SRR  Secondary Referral Report

Select Administrative Reports Option: ARC  Active Referrals without a
Printed C32
    
```

Figure 1-7: The ARC option

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

```

*****
*          INDIAN HEALTH SERVICE          *
*    REFERRED CARE INFORMATION SYSTEM    *
*          VERSION 4.0, Patch 7          *
*****
          DEMO INDIAN HOSPITAL
          Active Referrals without a Printed C32

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.

```

***** 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

REFERRAL #      PATIENT NAME                      REFERRAL DATE
-----
5059011100132   DEMO,PATIENT LADY                               3/1/11
5059011100133   DEMO,PATIENT LADY                               3/1/11
5059011100134   DEMO,PATIENT REFERRAL                          3/1/11
5059011100134A1 DEMO,PATIENT REFERRAL                          3/1/11
5059011100135A1 DEMO,PATIENT REFERRAL                          3/1/11
5059011100136   DEMO,PATIENT REFERRAL                          3/1/11

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

REFERRAL #      PATIENT NAME                      REFERRAL DATE
-----
5059011100135A2 DEMO,PATIENT REFERRAL                          3/1/11
5059011100136A1 DEMO,PATIENT REFERRAL                          3/1/11
    
```

5059011100140	DEMO,PATIENT REFERRAL	3/1/11
5059011100141	DEMO,PATIENT REFERRAL	3/1/11
5059011100142	DEMO,PATIENT REFERRAL	3/1/11
5059011100143	DEMO,PATIENT REFERRAL	3/1/11

Press any key to continue:

Figure 1-10: Patient information displays (Page 2)

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.

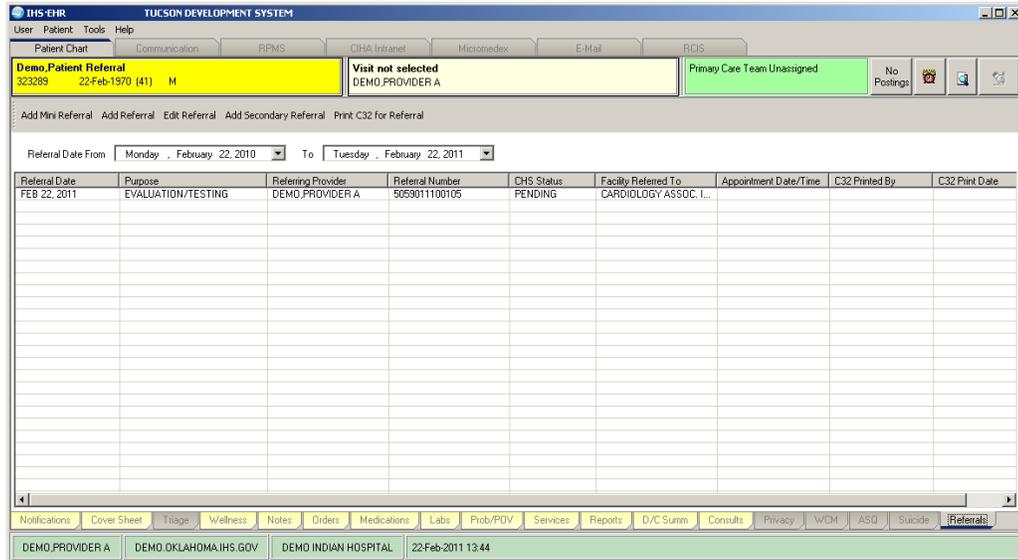


Figure 1-11: Referral Tab in Patient Chart

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.

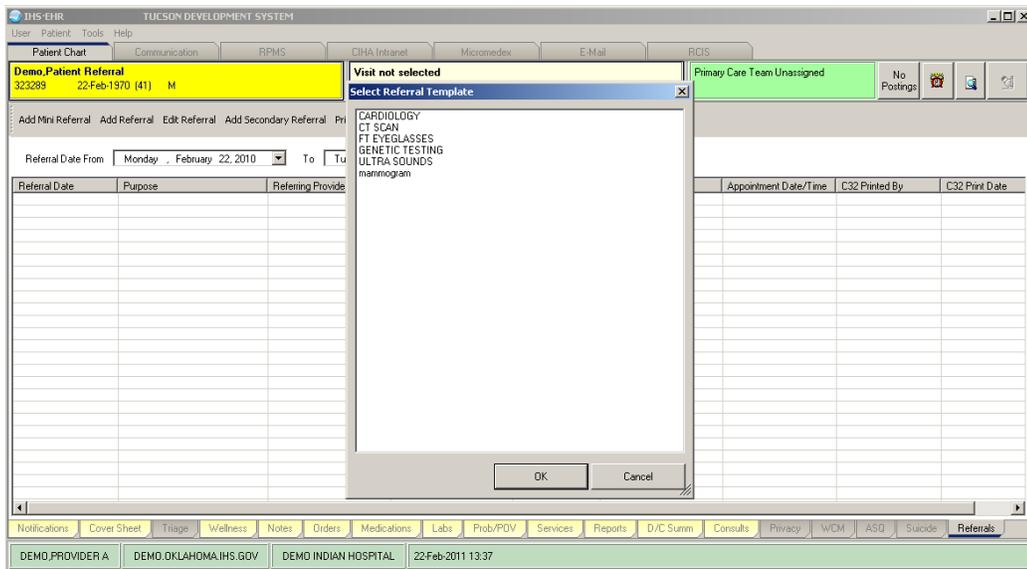


Figure 1-12: Referral Template selection window

4. Click **Add Referral** to enter information on a blank form.

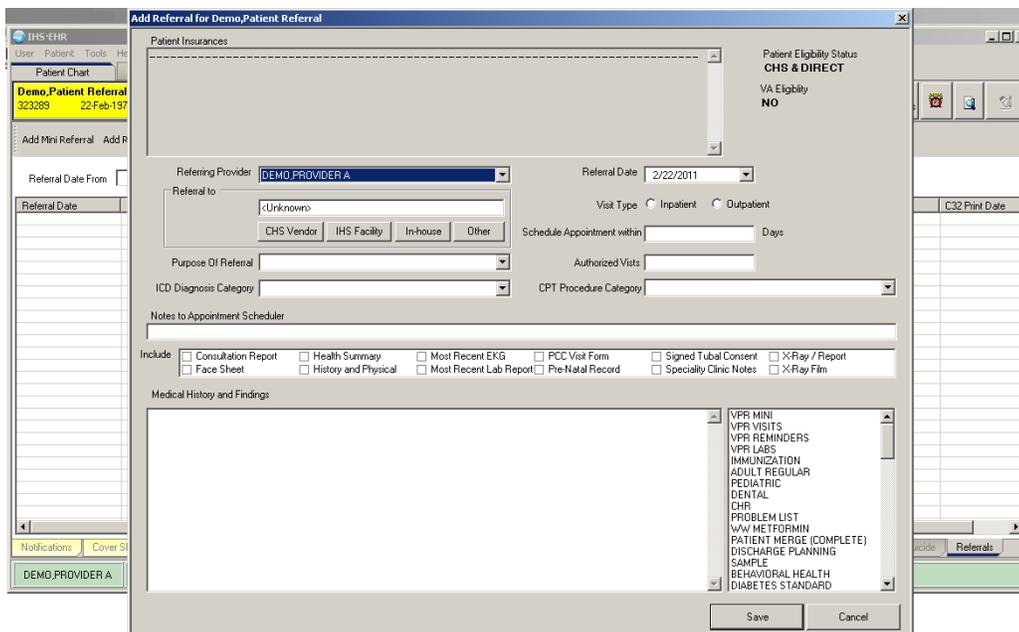


Figure 1-13: Blank Referral Form for Data Entry

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.)

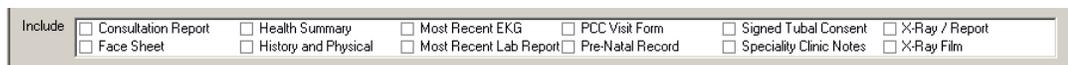


Figure 1-14: **Include** field used to select additional documents

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).

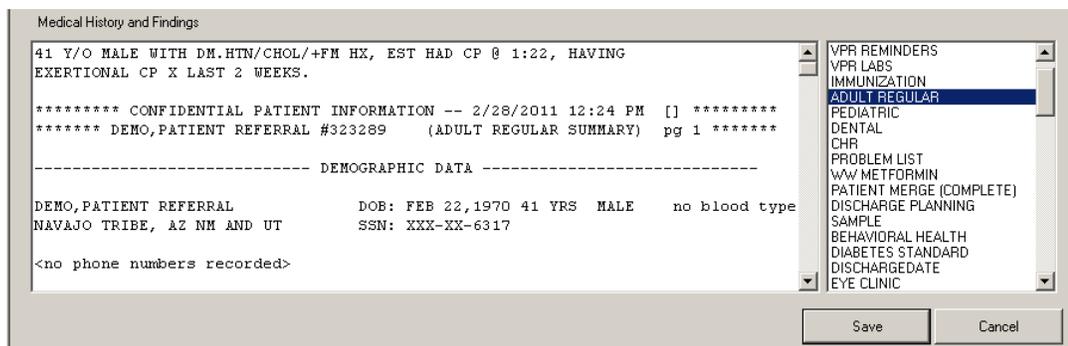


Figure 1-15: **Medical History and Findings** field

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.

The screenshot shows a software window titled "Add Secondary Referral for DEMO,PATIENT REFERRAL". The window contains several sections:

- Patient Insurances:** A large empty text area.
- Patient Eligibility Status:** PENDING
- VA Eligibility:** NO
- Referring Provider:** DEMO_PROVIDER A
- Referral Date:** 8/22/2011
- Referral to CHS Vendor:** CARDIOLOGY ASSOC. INC. (with buttons for CHS Vendor, IHS Facility, In-house, and Other)
- Visit Type:** Radio buttons for Inpatient and Outpatient (selected).
- Schedule Appointment within:** 7 Days
- Purpose Of Referral:** EVALUATION/TESTING
- Authorized Visits:** 1
- Call In Referral:** Unchecked checkbox.
- ICD Diagnosis Category:** CARDIOVASCULAR DISORDERS
- CPT Procedure Category:** EVALUATION AND/OR MANAGEMENT
- Notes to Appointment Scheduler:** A text area.
- Include:** A grid of checkboxes for various medical reports:

<input type="checkbox"/> Consultation Report	<input checked="" type="checkbox"/> Health Summary	<input checked="" type="checkbox"/> Most Recent EKG	<input type="checkbox"/> PCC Visit Form	<input type="checkbox"/> Signed Tubal Consent	<input type="checkbox"/> X-Ray / Report
<input type="checkbox"/> Face Sheet	<input type="checkbox"/> History and Physical	<input checked="" type="checkbox"/> Most Recent Lab Report	<input type="checkbox"/> Pre-Natal Record	<input type="checkbox"/> Speciality Clinic Notes	<input type="checkbox"/> X-Ray Film
- Medical History and Findings:** A large text area with an "Append Medical History" button.
- Buttons:** Save and Cancel at the bottom right.

Figure 1-16: Example of Secondary Referral form for Data Entry

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.)

The screenshot shows the 'Edit Referral for DEMO,PATIENT REFERRAL' window. The 'Approval Status' field is highlighted in red and contains the text 'PENDING'. The 'Append Medical History' button is also highlighted in red. The form includes the following fields and options:

- Patient Insurances:** (Empty list)
- Patient Eligibility Status:** CHS & DIRECT
- VA Eligibility:** NO
- Approval Status:** PENDING (highlighted in red)
- Referring Provider:** DEMO_PROVIDER A
- Referral Date:** 2/28/2011
- Referral to CHS Vendor:** CARDIOLOGY ASSOC. INC.
- Visit Type:** Inpatient Outpatient
- Schedule Appointment within:** 2 Days
- Purpose Of Referral:** EVALUATION/TESTING
- Authorized Visits:** 1
- ICD Diagnosis Category:** CARDIOVASCULAR DISORDERS
- CPT Procedure Category:** EVALUATION AND/OR MANAGEMENT
- Notes to Appointment Scheduler:** (Empty text area)
- Include:**
 - Consultation Report
 - Health Summary
 - Most Recent EKG
 - PCC Visit Form
 - Signed Tubal Consent
 - X-Ray / Report
 - Face Sheet
 - History and Physical
 - Most Recent Lab Report
 - Pre-Natal Record
 - Speciality Clinic Notes
 - X-Ray Film
- Medical History and Findings (Type in and/or append as many health summaries as required):**
 - DEMO_PROVIDER A FEB 28, 2011
 - 41 Y/O MALE WITH DM.HTN/CHOL/+FM HX, EST HAD CP @ 1:22, HAVING EXERTIONAL CP X LAST 2 WEEKS.
 - DEMO_PROVIDER A FEB 28, 2011
 - ***** CONFIDENTIAL PATIENT INFORMATION -- 2/28/2011 12:22 PM [] *****
 - ***** DEMO,PATIENT REFERRAL #323289 (ADULT REGULAR SUMMARY) pg 1 *****
 - DEMOGRAPHIC DATA -----
 - DEMO,PATIENT REFERRAL DOB: FEB 22,1970 41 YRS MALE no blood type
 - NAVAJO TRIBE, AZ NM AND UT SSN: XXX-XX-6317
- Append Medical History:** (button highlighted in red)
- Buttons:** Save, Cancel

Figure 1-17: Edit Referral Form Screen

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)

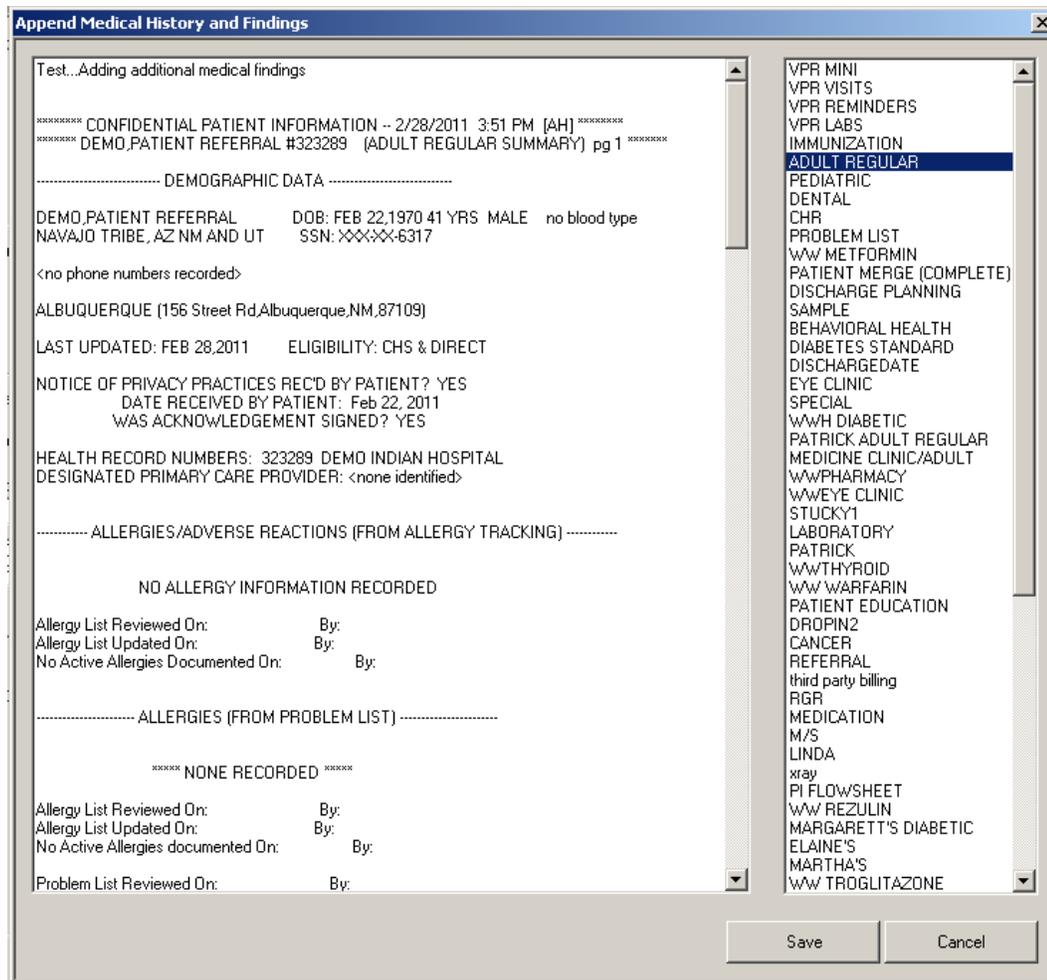


Figure 1-18: **Append Medical History and Findings** window

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.

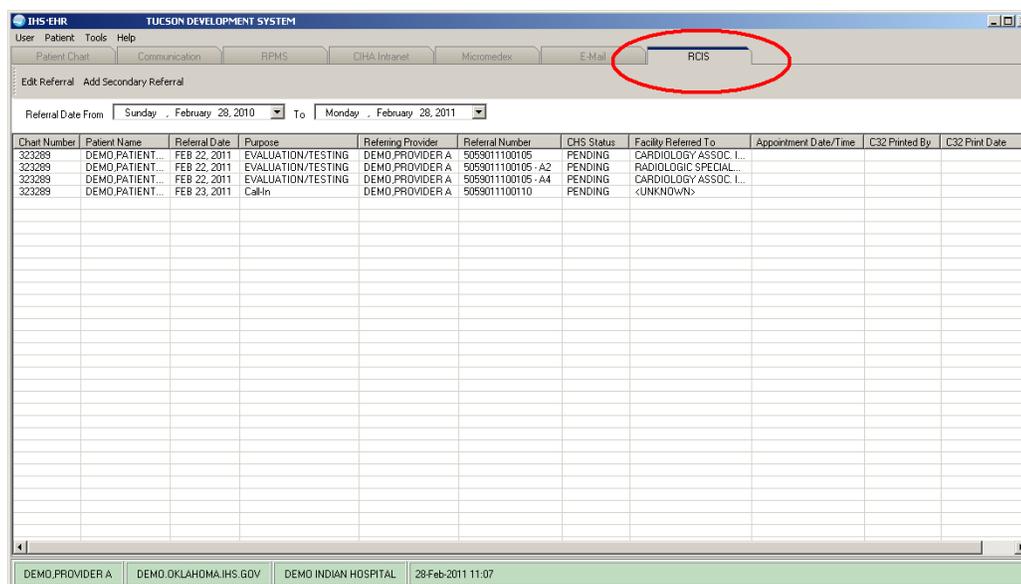


Figure 1-19: RCIS tab for provider-centric view

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.

Clinical Document

Continuity of Care Document - CCD for GENERATELIST PATIENT ONE at DEMO IHS CLINIC

Created On: March 11, 2011

Patient: GENERATELIST PATIENT ONE **MRN:** 8995_P49.: 20046

Birthdate: March 15, 1970 **Sex:** Female

Guardian: **Next of Kin:**

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- [Medications](#)
- [Results](#)
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Conditions or Problems

Date	Name	Status	ICD-9
01/19/2011	Coronary Atherosclerosis Of Unspecified Type Of Vessel,native Or Graft	Active	414.00
08/04/2010	Exercise Induced Bronchospasm		493.81

Allergies and Adverse Reactions

No Allergy Information for the report generation criteria. However, some allergy information may come from the problem list and may be included in the Condition module

Encounters

Date/Time	Location	Clinic	Description
02/10/2011 16:52:00	DEMO IHS CLINIC	GENERAL	Service Category: AMBULATORY
02/09/2011 10:31:00	DEMO IHS CLINIC	GENERAL	Service Category: DAY SURGERY
01/19/2011 19:14:00	DEMO IHS CLINIC	GENERAL	Service Category: AMBULATORY
01/19/2011 12:00:00	DEMO IHS CLINIC	PHARMACY	Service Category: AMBULATORY

Print Close

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>

E-mail: support@ihs.gov