



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Release of Information Disclosure System (BRN)

User Manual

Version 2.0
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Information Technology Support Center
Division of Information Resources
Albuquerque, New Mexico

PREFACE

This manual is designed to assist the end-user in the use of the Release of Information (ROI) Disclosure program. This User manual is designed to be helpful to the end-user. This documentation will provide sufficient information for users to competently operate the national software package.

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1.0 Introduction

The Release of Information Disclosure system (ROI) is designed to assist you in the automatic recording, tracking, and maintenance of all requests for Patient Medical Information data from the IHS field facility.

Each disclosure entered into the system is automatically assigned a sequential disclosure number preceded by the ASUFAC number for that particular site. Multiple site parameters can be created under the Management Menu option for tracking individual field site requests.

The program tracks the following information:

1. Requesting Party
2. Disclosure Record Status (Open/Closed/Hold)
3. Type of Disclosure (Medical, Record, Other);
4. Purpose of the Disclosure (Further Medical Care, Insurance, Attorney, Personal, School, Tort, ROI, Subpoena, Other)
5. Detailed Description/Additional pertinent information/Medical Record Date Range
6. Request Priority (Non-Critical, Stat)
7. Field Staff Assignment
8. Congressional Requests
9. Receiving Parties

New disclosure request status are automatically tagged as *Open*. Upon complete dissemination of records to all receiving parties the request status is automatically tagged as *Closed*.

All disclosures are tagged with a request priority of *Non-Critical*. Selected records can, then, be tagged later as *Stat*, allowing quick and easy access to selected higher-level priority disclosures.

Each disclosure request can also be assigned to a specific field staff, allowing balanced staff workload distribution and tracking.

The ROI Reports module is designed to assist users with the management, control, and maintenance of all incoming/completed requests. A brief description and example of each report is provided within this User manual.

Utilizing a variety of reports, the user can quickly inquire to the status of a particular request, obtain a list of all disclosures for a selected patient or group of patients; Print a list of all 'open' disclosures; Print a list of staff workload (By the User who created) and for a particular timeframe; Print all disclosures by request priority; print closed disclosures, etc.

Note: At the time of install of the new version 2.0 Package, all data will convert from the old version 1.0 Files and Globals (AZXA Namespace) to the new BRN name spacing conventions.

2.0 ROI Main Menu

The ROI Main menu allows you to access three sub menus, ROI Edit menu, ROI Reports menu, and ROI Management menu.

```
*****
*          INDIAN HEALTH SERVICE          *
*    RELEASE OF INFORMATION SYSTEM        *
*    VERSION 2.0, Jan 20, 2003            *
*****

          PARKER HOSP
    RELEASE OF INFORMATION SYSTEM

DE    ROI EDIT MENU ...
RPT   ROI REPORTS MENU ...
MGT   ROI MANAGEMENT MENU ...

Select RELEASE OF INFORMATION SYSTEM Option:
```

Figure 2-1: ROI Main Menu

3.0 ROI Disclosure Edit Menu (DE)

This menu provides you with a choice of options that allow you to add/edit/enter ROI disclosures.

- To access the ROI Disclosure Edit menu, type DE at “Select Release of Information System Option:” prompt at the ROI Main menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*      RELEASE OF INFORMATION SYSTEM                    *
*      VERSION 2.0, Jan 20, 2003                        *
*****

                PARKER HOSP
                RELEASE OF INFORMATION SYSTEM

DE   ROI EDIT MENU ...
RPT  ROI REPORTS MENU ...
MGT  ROI MANAGEMENT MENU ...

Select RELEASE OF INFORMATION SYSTEM Option: DE

```

Figure 3-1: Using the main menu

- The ROI Disclosure Edit menu will be displayed (Figure 3-2). Sections 3.1 through 3.10 explain each of the options listed in this menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*      RELEASE OF INFORMATION SYSTEM                    *
*      VERSION 2.0, Jan 20, 2003                        *
*****

                PARKER HOSP
                ROI EDIT MENU

ADD  Add a New Disclosure Record
MOD  Edit Existing Disclosure Record
DIS  Enter Disclosure Documentation
DEL  Delete Open Disclosure Records
AREQ Enter Additional Request Receipt Dates (2nd/3rd)
DDL  PATIENT Detail Disclosure Log (Cummulative)
DSP  Inquire to a Specific ROI Disclosure Record
PTC  Listing Patient Cumulative Disclosures (SUSPEND)
STAT Edit Request Status
ADDR Enter Patient Address (If different from Pt Reg)
SUDT Enter or Edit Beg/End SUSPEND Dates

Select ROI EDIT MENU Option:

```

Figure 3-2: Accessing the ROI disclosure edit menu

3.1 Add a New Disclosure (ADD)

Use this option to add a new disclosure request.

1. To add a new disclosure request, type **ADD** at the prompt in the ROI Disclosure Edit menu.
2. Type the patient's name or Health Record number at the "Select Patient Name:" prompt.
3. The system will automatically display the last one to four (1-4) requests (Figure 3-3).
4. Press the Return key at the "Do You Want to Continue with Adding a New Disclosure:" prompt.

```

Select PATIENT NAME: SMITH, ANITA

*****
**LAST 4 DISCLOSURES**
*****

04/11/00 290646      SMITH, ANITA      YOH MA MA
                    04/15/00      Purpose: OTHER
                    Status: CLOSED      Type: MEDICAL RECORD

04/07/00 290640      SMITH, ANITA      FALLON SCHOOL DISTRICT
                    UNKNOWN DISCLOSURE DATE      Purpose: ATTORNEY
                    Status: OPEN      Type: MEDICAL RECORD

04/07/00 290639      SMITH, ANITA      RENO DIAGNOSTICS
                    UNKNOWN DISCLOSURE DATE      Purpose: TORT
                    Status: OPEN      Type:

Do you want to continue with adding a new Disclosure? Y// [RET]

```

Figure 3-3: Adding a new disclosure (steps 1-4)

5. Type the desired date or press the Return key to accept the default entry at the "Date Request Initiated:" prompt.
6. The system will automatically assign a disclosure number at the "Disclosure Number:" prompt. There is no need for an entry. Press the Return key to accept the assigned number.
7. Select a type of disclosure by typing **MEDICAL RECORD** or **OTHER** at the "Type:" prompt.
8. If you selected *Other* as your disclosure type, then type a narrative description of the disclosure type at the "Other Type Description:" prompt.

```
DATE REQUEST INITIATED: TODAY// [RET]
```

DISCLOSURE NUMBER: 290647 [RET]

TYPE: **OTHER**

OTHER TYPE DESCRIPTION:

Figure 3-4: Adding a new disclosure (steps 5-8)

9. Type the name of the requesting party at the “Requesting Party:” prompt. If the requesting party is not already on list the name will be added to Site Specific Table file.
10. If you wish to add the address of the requesting party, type YES at the “Do you want to Enter Address Information on Requesting Party?” prompt. If you do not wish to enter this information, type NO at the “Do you want to Enter Address Information on Requesting Party?” prompt and skip to step 12.
11. Type the new or edited mnemonic (short cut to choose this Party) and address of the requesting party at the prompts.
12. Type the contact type at the “Select Contact Type:” prompt. You can choose from Home, Work, Cellular, Pager, Message, or No Phone.
13. Type YES at the “Are You Adding ‘Contact Type’ as a New Contact Type (the 1st for this ROI REQ REC Party)?” prompt.
14. Type the phone number information at the prompts.
15. Type another contact type or press the Return key if there are no other contacts to enter at the next “Select Contact Type:” prompt.
16. Type a purpose at the “Purpose:” prompt. You can select from:
 - Further Medical Care
 - Insurance
 - Attorney
 - Personal
 - School
 - Tort
 - FOIA
 - Subpoena
 - Other

REQUESTING PARTY: **FALLON SCHOOL DISTRICT**

**Do you want to Enter Address Information on Requesting Party? : YES

MNEMONIC: **FSD**

STREET/PO BOX: **1234 E. FILLMORE**

CITY: **PHOENIX**

STATE: **ARIZONA**

ZIP: **85004**

Select CONTACT TYPE: WORK
Are you adding 'WORK' as a new CONTACT TYPE (the 1ST for this ROI REQ REC PARTY)? No// Y (Yes)
PHONE NUMBERS: 224-5555
EXTENSION NUMBER: 223
Select CONTACT TYPE: [RET]
PURPOSE: FURTHER MEDICAL CARE

Figure 3-5: Adding a new disclosure (steps 9-16)

17. Type the request priority at the “Request Priority:” prompt. Choose either STAT or Non-Critical.
18. Type the name of the staff assigned to this disclosure at the “Staff Assignment:” prompt. This field is not mandatory, you may press the Return key or type @ to bypass.
19. Type YES or NO at the “Entire Record:” prompt. Type YES only if the entire record is sent.
20. If the disclosure includes a visit date range, type this range at the “Beginning Event Date:” and “Ending Event Date:” prompts. These fields are not mandatory.
21. Enter the specific record information at the “Specific Record Information:” prompt. Your answer must be 1-40 characters in length. Enter a detailed description only if you are sending specific information (i.e. you are sending only back injury related medical information).

REQUEST PRIORITY: NON-CRITICAL
STAFF ASSIGNMENT: SMITH, ADAM
ENTIRE RECORD:
BEGINNING EVENT DATE: 1-1-2000
ENDING EVENT DATE: 1-4-2000
SPECIFIC RECORD INFORMATION:

Figure 3-6: Adding a new disclosure (steps 17-21)

22. Enter any other additional useful information at the “Disclosure Notes:” prompt. This field is not required.
23. Type the name of the party to who is receiving this information at the “Select Receiving Party:” prompt. This party may or may not be the same party

requesting this information. This is a Site Specific Table file. If this is a new party, you will be prompted to confirm your selection.

24. Type the date the information was disclosed at the “Disclosure Date:” prompt.

25. Type the method of delivery at the “Record Dissemination:” prompt. Select from:

- H Hand Deliver
- I In Person
- MR Mail Regular
- MC Mail Certified
- F Fax
- O Other
- E Electronic

26. Type the next (if any) receiving party at the next “Select Receiving Party:” prompt. When you are finished entering receiving parties, press the Return key at a blank “Select Receiving Party:” prompt.

DISCLOSURE NOTES:

Select RECEIVING PARTY: **FALLON SCHOOL DISTRICT**
Are you adding 'FALLON SCHOOL DISTRICT' as
a new RECEIVING PARTY (the 1ST for this ROI DISCLOSURE)? No// **YES**

DISCLOSURE DATE: **4-15-00**

RECORD DISSEMINATION: **MAIL CERTIFIED**

Select RECEIVING PARTY: **[RET]**

Figure 3-7: Adding a new disclosure (steps 22-26)

3.2 Edit Existing Disclosure Record (MOD)

Use this option to modify an existing disclosure record. You may select the existing record by entering either the date disclosure was initiated, the disclosure number, the patient's name, or the patient's Health Record number. Once the desired record is selected, you can change any of the existing field values (which are displayed with current value and two forward slashes (/)).

1. To edit an existing disclosure record, type MOD at the prompt in the ROI Disclosure Edit menu.
2. To select an existing record, type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the “Select ROI Disclosure Date Request Initiated:” prompt. The system will then bring up the disclosure.

3. To edit a given field, type the new information after the two forward slashes (/). If no editing is needed press the Return key to view the next field.

```

Select ROI DISCLOSURE DATE REQUEST INITIATED: 4-13-2000      290647
SMITH,ANITA      FALLON SCHOOL DISTRICT

      DISCLOSURE NUMBER: 290647// (No Editing)
      PATIENT: SMITH,ANITA// (No Editing)
TYPE: MEDICAL// [RET]
OTHER TYPE DESCRIPTION: [RET]
REQUESTING PARTY: FALLON SCHOOL DISTRICT// [RET]

***Do you want to enter Requesting Party Information?: [RET]

PURPOSE: FOIA//[RET]
REQUEST PRIORITY: NON-CRITICAL// STAT
STAFF ASSIGNMENT: ADAM,ADAM//[RET]
ENTIRE RECORD: [RET]
BEGINNING EVENT DATE: JAN 1,2000//[RET]
ENDING EVENT DATE: APR 13,2000//[RET]
SPECIFIC RECORD INFORMATION: [RET]
DISCLOSURE NOTES: [RET]
      No existing text
      Edit? NO//[RET]
Select RECEIVING PARTY: FALLON SCHOOL DISTRICT//[RET]

Select RECEIVING PARTY: [RET]

```

Figure 3-8: Editing an existing disclosure

3.3 Enter Disclosure Documentation (DIS)

Use this option to document who, when, and how the documentation was provided for this disclosure request. You can select the existing record by either entering the date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number.

You can also change any of the existing field values (which are displayed with current Value and two forward slashes (/)).

1. To select an existing record, type DIS at the prompt in the ROI Disclosure Edit menu.
2. Type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the receiving party's name (either from the existing list or add a new receiving party name to the existing list) or press the Return key to keep the current entry.
4. Type the date of disclosure at the "Disclosure Date:" prompt.

5. Type how the disclosure was completed (i.e., hand deliver, in person, mail regular, mail certified, relative pickup, other) at the “Record Dissemination:” prompt.
6. Type the next receiving party at the next “Select Receiving Party:” prompt. When you are finished entering receiving parties, press the Return key at a blank “Select Receiving Party:” prompt.
7. Type the number of individual pages to be copied at the “Number of Pages:” prompt.
8. Type the cost of each copy at the “Cost per Page:” prompt.

```

Select ROI DISCLOSURE DATE REQUEST INITIATED: 4-13-2000      290647
SMITH,ANITA      FALLON SCHOOL DISTRICT

Select RECEIVING PARTY: FALLON SCHOOL DISTRICT// [RET]
DISCLOSURE DATE: T  4-17-2000
RECORD DISSEMINATION:
    Choose from:
        H      HAND DELIVER
        I      IN PERSON
        MR     MAIL REGULAR
        MC     MAIL CERTIFIED
        F      FAX
        O      OTHER
RECORD DISSEMINATION: MC  MAIL CERTIFIED

Select RECEIVING PARTY: PATIENT

    Are you adding 'PATIENT' as a new RECEIVING PARTY (the 2ND) No// YES
DISCLOSURE DATE: T  4-17-2000
RECORD DISSEMINATION: MC  MAIL CERTIFIED
NUMBER OF PAGES:      50
COST PER PAGE:      .10

Select RECEIVING PARTY:

```

Figure 3-9: Entering disclosure documentation

3.4 Delete Open Disclosure Records (DEL)

Use this Option to DELETE an *Open* Disclosure. Closed disclosures cannot be deleted. You can select the desired disclosure by entering either the disclosure number, patient name, or Patient Health Record number. The disclosure and verification message are displayed to insure that you selected the correct disclosure.

1. To delete an open disclosure, type DEL at the prompt in the ROI Disclosure Edit menu.

2. Type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the "Select Disclosure by Patient or by Disclosure Date or Disclosure #:" prompt.
3. To confirm deletion, type YES at the "Sure you want to delete?" prompt.
4. The message Disclosure Record Deleted will be displayed.

```

Select DISCLOSURE by Patient or by Disclosure Date or Disclosure #:    4-7-
2000          290637          HALL, B.J.
May 25, 2000 15:42:45

**DISCLOSURE RECORD IS DISPLAYED IN BROWSER MODE PRIOR TO DELETION DECISION**

Page:      1 of      3
User:    ADAM, ADAM
*****
Patient Name:          HALL, B.J.
Chart #:              78910
Date of Birth:        MAR 01, 1949
Sex:                  F
===== DISCLOSURE RECORD =====
DATE REQUEST INITIATED:  APR 07, 2000
DISCLOSURE NUMBER:      290637
PATIENT:                HALL, B.J.
TYPE:                   MEDICAL RECORD
OTHER TYPE DESCRIPTION: This Back Injury Specific
REQUESTING PARTY:       FALLON TRIBAL HLTH CLINIC
PURPOSE:                FURTHER MEDICAL CARE
REQUEST STATUS:         OPEN
REQUEST PRIORITY:       STAT
STAFF ASSIGNMENT:       STANLEY, BRIAN R
USER INITIATED:         ADAM, ADAM
USER COMPLETED:        ADAM, ADAM
ENTIRE RECORD:          NO
BEGINNING EVENT DATE:   JAN 01, 2000
ENDING EVENT DATE:      MAY 25, 2000
SPECIFIC RECORD INFORMATI: Back Injury
DATE DISCLOSURE CLOSED: MAY 25, 2000

PURPOSE OF DISCLOSURE:  FURTHER MEDICAL CARE

DISCLOSURE NOTES:

Original request was from the Patient (Self); then the Fall Tribal Health
Clinic requested the identical information.  This resulted in 2 Receiving
Parties for same request.

ROI RECEIVING PARTIES:

RECEIVING PARTY:        SELF
DISCLOSURE DATE:        MAY 25, 2000
RECORD DISSEMINATION:   MAIL CERTIFIED
NUMBER OF DAYS OLD:     48

```

RECEIVING PARTY:	FALLON TRIBAL HLTH CLINIC
DISCLOSURE DATE:	MAY 01, 2000
RECORD DISSEMINATION:	MAIL CERTIFIED
NUMBER OF DAYS OLD:	24

THE ABOVE DISCLOSURE AND RELATED ENTRIES WILL BE REMOVED FOREVER !!!
 Sure you want to delete? No// **YES**

Disclosure Record Deleted - 290637

Figure 3-10: Deleting an open disclosure

3.5 Enter Additional Request Receipt Dates (2nd/3rd) (AREQ)

The purpose of this function is to allow you to document second and/or third requests for medical information. You select the desired disclosure and populate the Date Received field. Once a second request date is entered, you cannot edit the value. The next edit will take you automatically to the third request date. See all reports for second and/third requests disclosures.

1. To enter additional request receipt dates, type **AREQ** at the prompt in the ROI Disclosure Edit menu.
2. Type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the second request date at the "2nd Request Date:" prompt.
4. Type the third request date at the "3rd Request Date:" prompt.

Select ROI DISCLOSURE DATE REQUEST INITIATED:	29062	3-6-2000	29062
TENNAR, LOWELL			
SHROEDER, RICKY ATTORNEY			
2ND REQUEST DATE:	5-1-00	(MAY 01, 2000)	
3RD REQUEST DATE:			

Figure 3-11: Entering additional request dates

3.6 Patient Detailed Disclosure Log (Cumulative) (DDL)

This report will print a cumulative list of one individual patient's disclosure requests. You simply enter the name of the desired patient. This report is useful for placing in the individual patient chart and serves as a total historical listing of all requests for information for this particular patient. Once a new request is received, this report should be generated again for this particular patient for documenting all disclosure request.

1. To print a Patient Detailed Disclosure log, type DDL at the prompt in the ROI Disclosure Edit menu.
2. Type the patient's name at the "Enter a Patient Name:" prompt.
3. Type the name of a print device at the "Device:" prompt.

Enter a Patient Name: HALL, B. J.		F 03-01-1949 450844584		PAH 78910	
DEVICE:					
CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT CUMMULATIVE PATIENT RECORD OCT 30, 2001 PAGE 1 HALL, B. J. 78910					

03/16/00	290626	TENN P. I. M. C.	FURTHER MEDI	MEDICAL RE	
04/07/00	290637	SELF FALLON TRIBAL H	FURTHER MEDI	MEDICAL RE	05/25/00
04/07/00	290641	FALLON SCHOOL D	OTHER	MEDICAL	
04/10/00	290642	FALLON SCHOOL D	SUBPOENA	OTHER	04/10/00
07/07/00	290657	PATIENT	SUBPOENA	MEDICAL RE	07/21/00
12/05/00	290660	RENO DIAGNOSTIC	INSURANCE	OTHER	

Figure 3-12: Printing a Patient Detailed Disclosure log

3.7 Inquire to a Specific ROI Disclosure Record (DSP)

This report allows you to quickly display or print a specific disclosure record. You will be asked to select the desired record. You may enter either the disclosure number or date of disclosure or patient's name or Health Record number. The report will list all current data recorded for this selected disclosure record.

1. To inquire to a specific ROI record, type DSP at the prompt in the ROI Disclosure Edit menu.
2. Type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the name of a print device at the "Device:" prompt.

Select ROI DISCLOSURE DATE REQUEST INITIATED: SMITH, ANITA
DEVICE:

ROI DISCLOSURE LIST		APR
13,2000	11:38	PAGE 1

DATE REQUEST INITIATED: MAR 07, 2000		
PATIENT: SMITH, ANITA		DISCLOSURE NUMBER: 290639
REQUESTING PARTY: FT. PECK TRIBE		TYPE: MEDICAL
REQUEST STATUS: HOLD		PURPOSE: SUBPOENA
CRITICAL		REQUEST PRIORITY: NON-
USER INITIATED: ADAM, ADAM		BEGINNING EVENT DATE:
JAN 01, 2000		
ENDING EVENT DATE: JAN 01, 2000		
SPECIFIC RECORD INFORMATION: MENTAL HEALTH ONLY		
DISCLOSURE NOTES: THIS IS THE DISCLOSURE NOTES		
RECEIVING PARTY: FT. PECK TRIBE	DISCLOSURE DATE: MAR 07, 2000	
RECORD DISSEMINATION: HAND DELIVER		
RECEIVING PARTY: BROWN, JAMES ATTORNEY	DISCLOSURE DATE: MAR 07, 2000	
RECORD DISSEMINATION: MAIL CERTIFIED		

Figure 3-13: Inquiring to a specific ROI record

3.8 Listing of Patient Cumulative Disclosures (PTC)

This option provides a quick onscreen display of only all disclosure records for a selected patient. The report prints the number of disclosures for this patient, the disclosure number, date received, requesting party, type of disclosure and the disclosure status.

1. To display a brief listing, type PTC at the prompt in the ROI Disclosure Edit menu.
2. Type the patient's name, or HRN at the "Select Patient Name:" prompt.
3. Press the Return key at the "Do you Wish to Print Suspended Disclosures?" prompt. By selecting **NO**, all disclosures (tagged with a beginning and ending suspend date) will not print, providing that the suspend dates fall within today's date (the date the report is printed). If you type **YES**, all disclosures will print for the selected patient (whether or not the suspend date exists).
4. Type the name of a print device at the "Device:" prompt.

Select PATIENT NAME: SMITH, ANITA				
Do You Wish to print SUSPENDED Disclosures? NO// [RET]				
DEVICE:				
CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT				
CUMMULATIVE DISCLOSURE RECORDS FOR: SMITH, ANITA				
HEALTH RECORD #: PAH 1905				
DISPLAY DATE: Apr 17, 2000				
Number	DISC #	DT REC'D	REQUESTING PARTY	TYPE
				STATUS

1)	29064	3/7/00	FT. PECK TRIBE	P	H
2)	290625	3/15/0	RENO DIAGNOSTICS	O	O
3)	290635	4/7/00	YOH MA MA	M	C
4)	290638	4/7/00	P.I.M.C.	P	O
5)	290639	4/7/00	RENO DIAGNOSTICS	P	O
6)	290640	4/7/00	FALLON SCHOOL DISTRICT	M	O
7)	290646	4/11/00	YOH MA MA	M	O
8)	290647	4/13/00	FALLON SCHOOL DISTRICT	P	C

Figure 3-14: Displaying a brief listing

3.9 Edit Request Status (STAT)

This Option allows you to quickly tag disclosures with a request status.

1. To edit a request status, type STAT at the prompt in the ROI Disclosure Edit menu.
2. Type date Disclosure was initiated, the Disclosure number, the patient's name, or the Patient's Health Record number at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type a Request Status option at the "Request Status:" prompt. Your options are:
 - O (OPEN)
 - H (HOLD)
 - C (CLOSED)
 - D (DENIED)
 - S (SUSPEND)

Select ROI DISCLOSURE DATE REQUEST INITIATED: **290621**

REQUEST STATUS: **OPEN**

Figure 3-15: Editing a request status

3.10 Enter or Edit Beg/End Suspend Dates (SUDT)

This data entry option allows you to tag specified disclosures with a suspend date range. You are prompted for a starting date and then an ending date. The purpose of the suspend dates are to prevent the printing of this disclosure when printing the PTC (Listing of Patient Cumulative Disclosures (Suspend)) report. This report allows you to not print any disclosures if those suspend dates fall within the date the report is printed.

1. To enter or edit beg/end suspend dates, type SUDT at the prompt in the ROI Disclosure Edit menu.

2. Type date disclosure was initiated, the disclosure number, the patient's name, or the Patient's Health Record number at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the start of the suspend date at the "Suspend Start DT:" prompt.
4. Type the end of the suspend date at the "Suspend Stop DT:" prompt.

Select ROI DISCLOSURE DATE REQUEST INITIATED: **290621**

SUSPEND START DT:: **T** (JAN 13, 2003)

SUSPEND STOP DT: **T+30** (FEB 12, 2003)

Figure 3-16: Entering suspend dates

4.0 ROI Reports Menu (RPT)

This menu allows you to print several reports specific to the ROI disclosure system.

- To access the ROI Reports menu, type RPT at “Select Release of Information System Option:” prompt at the ROI Main menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*          RELEASE OF INFORMATION SYSTEM                *
*          VERSION 2.0, Jan 20, 2003                    *
*****
                PARKER HOSP
                RELEASE OF INFORMATION SYSTEM

DE      ROI EDIT MENU ...
RPT     ROI REPORTS MENU ...
MGT     ROI MANAGEMENT MENU ...

Select RELEASE OF INFORMATION SYSTEM Option: RPT

```

Figure 4-1: Accessing the report menu

- The ROI Reports menu will be displayed (Figure 4-2). Sections 4.1 through 4.15 explain each of the options listed in this menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*          RELEASE OF INFORMATION SYSTEM                *
*          VERSION 2.0, Jan 20, 2003                    *
*****
                PARKER HOSP
                ROI REPORTS MENU

2ND     Print All Disclosures W/2nd and/or 3rd Requests
AGE     Print AGING Report - By Request Status
AGER    Print AGING Report - By a Selected Age Range
CNT     Count Closed Disclosures By Purpose/Date Range
DDL     PATIENT Detail Disclosure Log (Cummulative)
DIS     Print CLOSED Disclosure Records
FOIA    Print Total Number First Party Requests
IQ      Inquire to a Specific ROI Disclosure Record
ML      Print Master Log (By Date Range)
OP      Print OPEN Disclosures Only
PAGE    Print Reproduction Page Costs (By Date Range)
REQ     Priority Request Report (By STATUS)
RPW     Print Requesting Party Workload by Date Range
SUSP    Print SUSPEND Disclosures Only (For Date Range)
WK      Print User Workload by Date Range

Select ROI REPORTS MENU Option:

```

Figure 4-2: Using the ROI reports menu

4.1 Print All Disclosures W/2nd and/or 3rd Requests (2ND)

The purpose of this report is to print a listing of all disclosures during a specified date range for which there was either a second and/or third request for the same patient medical information.

1. To print all disclosures with a second and/or third request, type 2nd at the ROI Reports menu.
2. Type the beginning of the date range at the “Enter Beginning ROI Initiated Date:” prompt.
3. Type the ending of the date range at the “Enter Ending ROI Initiated Date:” prompt.
4. Type the name of a print device at the “Device:” prompt.

Enter beginning ROI Initiated Date: 1-1-00 (JAN 01, 2000)					
Enter ending ROI Initiation Date: (1/1/00 - 99/99/99): TODAY (OCT 30, 2001)					
DEVICE:					
CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT					
ROI DISCLOSURE LIST		OCT 30, 2001 14:27		PAGE 1	
DT	DISCLOSURE NUMBER	REQUESTING PARTY	REQUEST STATUS	2ND RQST DT	3RD RQST DT

02/29/00	29061	FT. PECK TRIBE	CLOSED	10/04/01	10/04/01
03/06/00	29062	SHROEDER, RICKY ATTORNEY	HOLD	05/01/00	
10/04/01	290663	PATIENT	CLOSED	10/04/01	
10/19/01	290665	PAT GOWAN & ASSOCIATES	CLOSED	10/19/01	

Figure 4-3: Printing all disclosures

4.2 Print Aging Report - By Request Status (AGE)

Use this report to print a listing of the disclosure by status (i.e., open, closed, hold, denied).

This report prints the disclosure number, disclosure status, date received, receiving party(s), the date disclosed (if any), the request priority, and purpose. The number of days old is calculated at the time the report is printed (using today's date).

1. To print an aging report by request status, type AGE at the ROI Reports menu.
2. Type YES or NO at the “Would You Like to Include Only a Particular ROI Disclosure Status in this Report?” prompt.

3. Type the type status you are interested in at the “Enter the Status:” prompt.
4. Type the name of a print device at the “Device:” prompt.

```

Would you like to INCLUDE ONLY a particular ROI Disclosure Status in this
report? NO// YES

Enter the Status: HOLD

DEVICE:

AGING REPORT          **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                        JUL  5,2000  16:23      PAGE 1

```

DISC #	ST	DT REC'D	RECEIVING PARTY	AGE	DISC DT	P	PURPOSE
29062	H	03/06/00	SHROEDER, RIC	1	03/07/00	N	ATTORNEY
29064	H	03/07/00	FT. PECK TRI	0	03/07/00		
			BROWN, JAMES	0	03/07/00	N	SUBPOENA
29068	H	03/01/00	ROBERT SMITH	126		N	ATTORNEY
290610	H	01/15/97	DEWEY CHEATU	1267		N	ATTORNEY

Figure 4-4: Printing aging report by status

4.3 Print Aging Report - By a Selected Age Range (AGER)

Use this report to print a listing of the disclosure by a selected age range (i.e., 30 days +, 60 days +, 90 days +, 120 days +).

The report prints the disclosure number, disclosure status, date received, receiving party(s) the date disclosed (if any), the request priority, and purpose. The days old is calculated at the time the report is printed (using today's date).

1. To print an aging report by selected age range, type **AGER** at the ROI Reports menu.
2. Type **YES** or **NO** at the “Would You Like to Include a Particular Aging Starting Range?” prompt.
3. Type the number of days you would like to start at the “Enter the Number Starting Point:” prompt.
4. Type the name of a print device at the “Device:” prompt.

```

Would you like to include a particular Aging Starting Range? ? NO// YES

Select one of the following:

      30      30 DAYS +
      60      60 DAYS +
      90      90 DAYS +

```

120		120 DAYS +					
Enter the Number Starting Point: 120 DAYS +							
DEVICE:							
AGING REPORT		**CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**					
		JUL 5, 2000 16:30				PAGE 1	
		RECEIVING					
DISC #	ST	DT REC'D	PARTY	AGE	DISC DT	P	PURPOSE

29066	O	03/05/00	NIKE CORPORA	122		N	PERSONAL
29068	H	03/01/00	ROBERT SMITH	126		N	ATTORNEY
29061	C	02/29/00	ROBERT SMITH	127		N	FURTHER MEDICAL C
290615	O	01/15/00	SALT RIVER C	172		N	FURTHER MEDICAL C
29065	O	12/30/99	DEWEY CHEATU	188		N	FURTHER MEDICAL C
29069	O	02/25/99	P.I.M.C.	376			
		03/07/00	N SCHOOL				
290616	O	05/26/99	PATIENT	406		N	SCHOOL
290611	C	03/26/98	TENNAR, GREG	712			
		03/07/00	N PERSONAL				
290611	C	03/26/98	TENNAR	832		N	PERSONAL

Figure 4-5: Printing an aging report by a selected date range

4.4 Count Closed Disclosures by Purpose/Date Range (CNT)

Use this report to count and print a summary listing of closed disclosures (for a specified date range). This count is then sub-totaled by purpose of disclosure.

1. To print a count of closed disclosures, type CNT at the ROI Reports menu.
2. Type the beginning date of the date range at the "Enter beginning ROI initiated Date:" prompt.
3. Type the ending date of the date range at the "Enter ending ROI Initiation Date:" prompt.
4. Type the name of a print device at the "Device:" prompt.

Enter beginning ROI Initiated Date: 1-1-00 (JAN 01, 2000)			
Enter ending ROI Initiation Date: (1/1/00 - 99/99/99): TODAY (OCT 30, 2001)			
DEVICE:			
ROI DISCLOSURE STATISTICS		OCT 30,2001	14:36
PURPOSE		PAGE 1	

PURPOSE: FURTHER MEDICAL CARE			
SUBCOUNT	5		

SUBCOUNT	4	PURPOSE: ATTORNEY
SUBCOUNT	1	PURPOSE: PERSONAL
SUBCOUNT	5	PURPOSE: SCHOOL
SUBCOUNT	1	PURPOSE: TORT
SUBCOUNT	3	PURPOSE: FOIA
SUBCOUNT	3	PURPOSE: SUBPOENA
SUBCOUNT	1	PURPOSE: OTHER
COUNT	23	

Figure 4-6: Printing a count of closed disclosures

4.5 Patient Detail Disclosure Log (Cumulative) (DDL)

Use this report to print a cumulative list of one individual patient's disclosure requests. This report is useful for placing in the individual patient chart and serves as a total historical listing of all requests for information for this particular patient. Once a new request is received, this report should be generated again for this particular patient for documenting all disclosure requests. This report can also be printed under the Data Entry Menu option.

1. To print a detailed patient disclosure log, type DLL at the ROI Reports menu.
2. Type the patient's name at the "Enter a Patient Name:" prompt.
3. Type the name of a print device at the "Device:" prompt.

Enter a Patient Name: HALL, B. J.		F 03-01-1949 450844584		PAH 78910
DEVICE:				
CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT				
CUMMULATIVE PATIENT RECORD		JAN 23, 2002	PAGE	1
HALL, B. J. -HR#: 78910	RECORD INFORMATION	REC PTY	DT	DISC

12/26/01	290626	FU	Info from Immunization Series received	TENNAR, GREGORY P.I.M.C.

04/07/00	290637	FU	Lower Back Injury related to car accident which occurred on 1-1-00 FALLON TRIBAL H	SELF	05/25/00
04/07/00	290641	OT	Only sending more back injury visit related records	FALLON SCHOOL	
04/10/00	290642	SU		FALLON SCHOOL D	04/10/00
07/07/00	290657	SU		PATIENT	01/04/02
12/05/00	290660	IN		RENO DIAGNOSTIC	
01/08/02	290680	SC		PATIENT	01/08/02
07/17/01	2906124	FU	All Dental Visit data	NAVAL AIR STATI	01/08/02

Figure 4-7: Printing a detailed patient disclosure log

4.6 Print Closed Disclosure Records (DIS)

This report will print all closed disclosures for any given time frame. The report displays the disclosure number, date the disclosure initiated, the requesting party, the staff who entered the disclosure, the user who completed the disclosure, the receiving party(s), and the date disclosed.

1. To print a closed disclosure record, type DIS at the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type the name of a print device at the "Device:" prompt.

Enter beginning ROI Initiated Date: 1-1-2000					
Enter ending ROI Initiation Date: (1/1/00 - 99/99/99): 6-10-00					
DEVICE:					
CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT					
ROI DISCLOSURE LIST					
APR 13, 2000 13:48 PAGE 1					
DISCLOSURE NUMBER	REQUESTING PARTY	USER INITIATED	USER COMPLETED	RECEIVING PARTY	DISCLOSURE DATE

29067	FT. PECK TRIB	ADAM, ADAM	ADAM, ADAM	BROWN, JAMES A	08/27/98
290619	P. I. M. C.	ADAM, ADAM	ADAM, ADAM	P. I. M. C.	11/26/99
290618	NIKE CORPORAT	ADAM, ADAM	ADAM, ADAM	NIKE CORPORAT	01/02/00
290618	NIKE CORPORAT	ADAM, ADAM	ADAM, ADAM	DRINKING WATE	01/03/00
290612	DRINKING WATE	MGR, TWO	ADAM, ADAM	DRINKING WATE	02/24/00
				NIKE CORPORAT	02/24/00
29061	FT. PECK TRIB	ADAM, ADAM	ADAM, ADAM	FT. PECK TRIB	03/05/00
29063	FALLON TRIBAL	BARTLETT, J	ADAM, ADAM	RENO DIAGNOST	03/07/00

290611	TENNAR, GREGO	MGR, FOURTE	ADAM, ADAM	TENNAR, GREGO	03/07/00
290632	SALT RIVER CL	ADAM, ADAM	ADAM, ADAM	SALT RIVER CL	03/17/00
290633	YOH MA MA	ADAM, ADAM	ADAM, ADAM	YOH MA MA	03/22/00
290635	YOH MA MA	ADAM, ADAM	ADAM, ADAM	YOH MA MA	04/07/00
				PATIENT	04/07/00
290642	FALLON SCHOOL	ADAM, ADAM	ADAM, ADAM	FALLON SCHOOL	04/10/00
290645	ROBERT SMITH,	ADAM, ADAM	ADAM, ADAM	ROBERT SMITH,	04/10/00

Figure 4-8: Printing a closed disclosure record

4.7 Print Total Number First Party Requests (FOIA)

Use this report to count and print a summary listing of disclosures (for a specified date range). This count is sub-totaled by purpose of disclosure.

Beginning October 2, 2001, the Freedom of Information Act (IHS Headquarters) requires monthly/quarterly reporting of all “First Party” requests for medical records (access requests).

This report is designed to respond to these newly mandated reporting requirements.

FOIA First Party Requests		JAN 14, 2002	14:10	PAGE 1
PURPOSE				

		PURPOSE: FURTHER MEDICAL CARE		
SUBCOUNT	2			
		PURPOSE: INSURANCE		
SUBCOUNT	6			
		PURPOSE: PERSONAL		
SUBCOUNT	1			
		PURPOSE: SCHOOL		
SUBCOUNT	7			
		PURPOSE: TORT		
SUBCOUNT	1			
		PURPOSE: OTHER		
SUBCOUNT	1			
COUNT	18			

Figure 4-9: Printing total number of first party requests

4.8 Inquire to a Specific ROI Disclosure Record (IQ)

Use this report to quickly display or print a specific disclosure record. You will be asked to select the desired record. The report will list ALL current data recorded for the selected disclosure record.

1. To inquire about a specific ROI disclosure record, type the Disclosure number, date of Disclosure, patient's name, or Health Record number at the “Select ROI Disclosure Date Request Initiated:” prompt.
2. Type the name of a print device at the “Device:” prompt.

```

Select ROI DISCLOSURE DATE REQUEST INITIATED: 290639

DEVICE:

ROI DISCLOSURE LIST                                APR 13, 2000  11:38  PAGE 1
-----
DATE REQUEST INITIATED: MAR 07, 2000      DISCLOSURE NUMBER: 290639
PATIENT: SMITH, ANITA                      TYPE: MEDICAL
REQUESTING PARTY: FT. PECK TRIBE           PURPOSE: SUBPOENA
REQUEST STATUS: HOLD                      REQUEST PRIORITY: NON-CRITICAL
USER INITIATED: ADAM, ADAM                BEGINNING EVENT DATE: JAN 01, 2000
ENDING EVENT DATE: JAN 01, 2000
SPECIFIC RECORD INFORMATION: MENTAL HEALTH ONLY
DISCLOSURE NOTES: THIS IS THE DISCLOSURE NOTES
RECEIVING PARTY: FT. PECK TRIBE           DISCLOSURE DATE: MAR 07, 2000
RECORD DISSEMINATION: HAND DELIVER
RECEIVING PARTY: BROWN, JAMES ATTORNEY    DISCLOSURE DATE: MAR 07, 2000
RECORD DISSEMINATION: MAIL CERTIFIED

```

Figure 4-10: Inquiring about a specific ROI Disclosure record

4.9 Print Master Log (By Date Range) (ML)

This report prints a master log of all disclosure requests for a given date range entered by the user. The report prints the name/address of the requesting party, The patient/health record, date request received, date request closed/completed, and the purpose of the request. This report serves as a replacement to the currently maintained hand-written master log.

1. To print a master log, type ML at the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type the name of a print device at the "Device:" prompt.

```

Enter beginning ROI Initiated Date: 1-1-00

Enter ending ROI Initiation Date: (1/1/00 - 99/99/99): 3-30-00

DEVICE:

MASTER CONTROL LOG -CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY AGE
                                JAN 13, 2003                                PAGE 1
DT REC'D      REQ PTY/ADDRESS      PATIENT/HR #      DESCRIPTION
                                PURPOSE      DT DISCLOSED
-----
01/01/00      HHHI                AGUILAR, ERICKA    DIABETES INFO
                P O BOX 1234      HR# 9190           08/23/02

```

2906152	TUCSON, ARIZONA 85746	OTHER	DISCLOSURE #:
01/15/00	SALT RIVER CLINIC 123 GOLD STREET PHOENIX, ARIZONA 85004	ELCEYDE, BEVERLY SCHOOL IMMUNIZATION HR# 7593 FURTHER MEDICAL	DISCLOSURE #:
290615			
02/02/00	DEWEY CHEATUM AND HO 40 S. CENTRAL PHOENIX, ARIZONA 85004	ADDI, DARLA HR# 13598 INSURANCE	HYSTORECOMY DATA DISCLOSURE #:
290614			
02/22/00	DRINKING WATER 567 THIRSTY DR FOUNTAIN, MONTANA 97852	BAASUN, CHANCE L HR# 5773 PERSONAL	RELATED TO WATER 06/13/02 DISCLOSURE #:
290612			
03/01/00	P.I.M.C. BACK INJURY PHOENIX, ARIZONA 85004	WALSH, DIANA HR# 5995 ATTORNEY	ONLY INFO. ON DISCLOSURE #:
29068			
03/03/00	YO MAMMA PO BOX 546 GALLUP, NEW MEXICO 87306	ADDI YYY, RICKEY ORTHOPEDIC REPORTS HR# 10716 FOIA	06/13/02 DISCLOSURE #:
290633			
03/07/00	SHROEDER, RICKY ATTOR RECORDS ,	TENNAR, LOWELL HR# 111112 ATTORNEY	BACK INJURY 01/03/03 DISCLOSURE #:
29062			
03/07/00	FALLON TRIBAL HLTH C (RIGHT) ,	ADDI, ANDERSON HR# 10023 FURTHER MEDICAL	BROKEN LEG 06/13/02 DISCLOSURE #:
29063			

Figure 4-11: Printing the Master Log

4.10 Print Open Disclosures Only (OP)

This report will print ALL open disclosure records. The report will list ALL current data recorded for each disclosure record.

1. To print open disclosures, type OP at the ROI Reports menu.
2. Type the name of a print device at the "Device:" prompt.

DEVICE:

CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT

ROI DISCLOSURE LIST

APR 13, 2000

12:12 PAGE 1

REQUEST STATUS: OPEN

DATE REQUEST INITIATED: DEC 30, 1999 DISCLOSURE NUMBER: 29065
 PATIENT: SULYZ, SOPHIA TYPE: MEDICAL RECORD
 REQUESTING PARTY: ROBERT SMITH, ATTORNEY
 PURPOSE: FURTHER MEDICAL CARE REQUEST STATUS: OPEN
 REQUEST PRIORITY: NON-CRITICAL STAFF ASSIGNMENT: ADAM, ADAM
 USER INITIATED: ADAM, ADAM ENTIRE RECORD: YES
 RECEIVING PARTY: ROBERT SMITH, ATTORNEY DISCLOSURE DATE: JAN 15, 2000
 RECORD DISSEMINATION: MAIL CERTIFIED
 RECEIVING PARTY: DEWEY CHEATUM AND HOWE

DATE REQUEST INITIATED: MAR 05, 2000 DISCLOSURE NUMBER: 29066
 PATIENT: ADDI, SUE TYPE: MEDICAL RECORD
 REQUESTING PARTY: NIKE CORPORATION PURPOSE: PERSONAL
 REQUEST STATUS: OPEN REQUEST PRIORITY: NON-CRITICAL
 USER INITIATED: MGR, TWO USER COMPLETED: ADAM, ADAM
 RECEIVING PARTY: NIKE CORPORATION

DATE REQUEST INITIATED: FEB 25, 1999 DISCLOSURE NUMBER: 29069
 PATIENT: WETEHUMYGYA, ANNIE TYPE: MEDICAL
 REQUESTING PARTY: P.I.M.C. PURPOSE: SCHOOL
 REQUEST STATUS: OPEN REQUEST PRIORITY: NON-CRITICAL
 USER INITIATED: ADAM, ADAM BEGINNING EVENT DATE: FEB 28,
 1974 ENDING EVENT DATE: MAR 07, 2000
 RECEIVING PARTY: P.I.M.C. DISCLOSURE DATE: MAR 07, 2000
 RECORD DISSEMINATION: IN PERSON

Figure 4-12: Printing open disclosures

4.11 Print Reproduction Page Costs (By Date Range) (PAGE)

Use this to print a summary of all the reproduction costs associated with all disclosures for a given date range. You must first enter the number of pages and the cost of each of those pages (for each receiving party). The total cost is automatically calculated for these disclosures (including the average cost for the total number of disclosures for that given date range).

1. To print the reproduction page cost report, type **PAGE** at the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type the name of a print device at the "Device:" prompt.

```

Enter beginning ROI Initiated Date:  1-1-80  (JAN 01, 1980)
Enter ending ROI Initiation Date:  (1/1/80 - 99/99/99): T  (JAN 03, 2003)
DEVICE:

ROI LISTING RECORD STATISTICS                                JAN  3,2003  11:06    PAGE 1

      DISCLOSURE      TOTAL
      NUMBER          PAGES          TOTAL REPRODUCTION COST
-----
TOTAL          78          8.00
COUNT      243          243
MEAN                0.03

```

Figure 4-13: Printing reproduction page costs report

4.12 Priority Request Report (By STATUS) (REQ)

Use this report to track the STATUS of a Disclosure for any given period of time.

The report also prints the name of the staff assigned to each Disclosure (if any).

1. To print the priority request report, type REQ the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type YES at the "Would you Like to Include Only a Particular ROI Disclosure Status in this report?:" prompt.
5. Type the name of the status at the "Enter the Status:" prompt.
6. Type the name of a print device at the "Device:" prompt

```

Enter beginning ROI Initiated Date:  1-1-2000
Enter ending ROI Initiation Date:  (1/1/00 - 99/99/99): 7-6-00

Would you like to INCLUDE ONLY a particular ROI Disclosure Status in this
report? NO// YES

Enter the Status: HOLD

DEVICE:

DISCLOSURE LIST  **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                JUL  6,2000  17:00    PAGE 1

```

STAFF DATE	DISCLOSURE		REQUEST		REQUEST
	NUMBER	TYPE	PRIORITY	STATUS	ASSIGNMENT
03/01/00	29068	MEDICAL RECORD	NON-CRI	HOLD	DOE, JANE
03/06/00	29062	MEDICAL RECORD	NON-CRI	HOLD	HANSEN, SALLY
03/07/00	29064	MEDICAL	NON-CRI	HOLD	SMITH, JOE

Figure 4-14: Printing a priority request report

4.13 Print Requesting Party Workload by Date Range (RPW)

Use this report to provide a listing (for a specified date range entered by the User) of all disclosures by the requesting party. You will be asked if a specific requesting party is desired. If so, you enter that requesting party. The report displays the disclosure number, date initiated, user who entered record, patient name, type of disclosure and the requesting party.

1. To print the requesting party workload by date report, type **RPW** the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type **YES** at the "Want to Include a Particular Party Who Requested the Disclosure:" prompt.
5. Type the name of the requesting party at the "Enter Requesting Party Name:" prompt.
6. Type the name of a print device at the "Device:" prompt.

```

Enter beginning ROI Initiated Date:  1-1-01  (JAN 01, 2001)
Enter ending ROI Initiation Date:  (1/1/01 - 99/99/99): T  (OCT 26, 2001)

Want to INCLUDE a particular Party Who Requested the Disclosure? NO// YES
Enter Requesting Party Name: PATIENT
DEVICE:

USER WORKLOAD - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                JAN  7, 2003  12:53    PAGE 1
DIS #          USER          REQUESTING
      DATE     INITIATED  PATIENT      HRN #  TYPE    PARTY

```

29064	11/25/02	MGR, ONE	SMITH, ANITA	1905	M	FT. PECK TRIBE
290654	06/27/00	ADAM, ADAM	ONES, JENNY	2255	M	FT. PECK TRIBE
290625	03/15/00	ADAM, ADAM	SMITH, ANITA	1905	O	RENO DIAGNOSTIC
290639	04/07/00	ADAM, ADAM	SMITH, ANITA	1905	P	RENO DIAGNOSTIC
290660	12/05/00	ADAM, ADAM	HALL, BILLY J	8910	O	RENO DIAGNOSTIC
29063	03/07/00	ADAM, ADAM	ADDI, ANDERSON	10023	M	FALLON TRIBAL H
290627	02/16/01	ADAM, ADAM	OHNSON, CLETA	2000	P	FALLON TRIBAL H
290637	04/07/00	ADAM, ADAM	HALL, BILLY J	78910	M	FALLON TRIBAL H
290643	04/10/00	ADAM, ADAM	JOHNSON, CLETA	2000	M	FALLON TRIBAL H
290644	04/10/00	ADAM, ADAM	JOHNSON, CLETA	2000	O	FALLON TRIBAL H
290627	02/16/01	ADAM, ADAM	JOHNSON, CLETA	2000	P	FALLON TRIBAL H
290645	04/10/00	ADAM, ADAM	BROWN, DAVID	786789	M	ROBERT SMITH, A
29062	03/07/00	ADAM, ADAM	TENNAR, LOWELL	111112	M	SHROEDER, RICKY
COUNT 13						

Figure 4-15: Printing a requesting party report

4.14 Print Suspend Disclosures Only (For Date Range) (SUSP)

Use this report to print a listing of all disclosures which have been tagged with a Status of *suspend*. You will be asked for a specific date range.

1. To print the suspend disclosures only report, type **SUSP** at the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. Type the name of a print device at the "Device:" prompt.

Enter beginning ROI Initiated Date: 1-1-80 (JAN 01, 1980)						
Enter ending ROI Initiation Date: (1/1/80 - 99/99/99): T (JAN 03, 2003)						
DEVICE:						
SUSPENDED DISCLOSURES - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**						
JAN 3, 2003 15:10 PAGE 1						
DISCLOSURE NUMBER	REQUESTING PARTY	USER INITIATED	USER COMPLETED	RECEIVING PARTY	DISC DT	

29067	FT. PECK TRIB	ADAM, ADAM	ADAM, ADAM	BROWN, JAMES C	08/27/98	S
29062	SHROEDER, RICK	ADAM, ADAM	ADAM, ADAM	SHROEDER, RICK	03/07/00	
				PATIENT	01/03/03	S

Figure 4-16: Printing suspended disclosures only

4.15 Print User Workload by Date Range (WK)

Use this report to track data entry staff workload for a given date range.

1. To print the user workload by date range, type **WK** at the ROI Reports menu.
2. Type the beginning date at the “Enter Beginning ROI Initiated Date:” prompt.
3. Type the ending date at the “Enter Ending ROI Initiated Date:” prompt.
4. Type the user’s name at the “Enter User Name:” prompt.
5. Type the name of a print device at the “Device:” prompt.

```

Enter beginning ROI Initiated Date:  4-1-2000
Enter ending ROI Initiation Date:  (1/1/00 - 99/99/99):  4-30-00
Want to INCLUDE a particular User who Initiated the Disclosure? NO// YES
Enter User Name:  SMITH, ADAM
DEVICE:

USER WORKLOAD  **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                APR 13, 2000  13:03  PAGE 1
DISCLOSURE      USER
NUMBER    DATE    INITIATED    PATIENT    HR # TYPE    REQUESTING
-----
290635    04/07/00    SMITH, ADAM    SMITH, ANITA    45432 MEDICAL RE  YOH MA MA
290636    04/07/00    SMITH, ADAM    JONES, BREANNA M  5432 MEDICAL RE  PATIENT
290637    04/07/00    SMITH, ADAM    SMITH, ANITA    5432 MEDICAL RE  FALLON SD
290638    04/07/00    SMITH, ADAM    SMITH, ANITA    45432 MEDICAL    P.I.M.C.
290639    04/07/00    SMITH, ADAM    SMITH, ANITA    45432 MEDICAL    DIAGNOSTIC
290640    04/07/00    SMITH, ADAM    SMITH, ANITA    45432 MEDICAL RE  FALLON SD
290641    04/07/00    SMITH, ADAM    HALL, B.J.      89898 MEDICAL    FALLON SD
COUNT      7
  
```

Figure 4-17: Printing user workload

5.0 ROI Management Menu (MGT)

This menu contains options that allow you to edit/enter several fields in the ROI system and print listing.

- To access the ROI Management menu, type MGT at the “Select Release of Information System Option:” prompt at the ROI Main menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*      RELEASE OF INFORMATION SYSTEM                    *
*      VERSION 2.0, Jan 20, 2003                        *
*****

                PARKER HOSP
                RELEASE OF INFORMATION SYSTEM

DE   ROI EDIT MENU ...
RPT  ROI REPORTS MENU ...
MGT  ROI MANAGEMENT MENU ...

Select RELEASE OF INFORMATION SYSTEM Option: MGT

```

Figure 5-1: Accessing the ROI Mgt menu

- The ROI Management menu will be displayed (Figure 5-2). Sections 5.1 through 5.6 explain each of the options listed in the ROI Management menu.

```

*****
*                INDIAN HEALTH SERVICE                *
*      RELEASE OF INFORMATION SYSTEM                    *
*      VERSION 2.0, Jan 20, 2003                        *
*****

                PARKER HOSP
                ROI MANAGEMENT MENU

CHG  Change Spelling of Requesting Party
EDT  Edit Disclosure Date Initiated Only
PE   Enter or Edit Requesting/Receiving Parties
PRT  Print Listing of all Parties
RR   Inquire to a Specific Requesting Party
SITE Enter or Edit Site Parameter

Select ROI MANAGEMENT MENU Option:

```

Figure 5-2: Selecting the ROI Management Menu

5.1 Change Spelling of Requesting Party (CHG)

Use this option to change the spelling of existing records. You cannot delete records, but only change the spelling.

1. To change the spelling of a requesting party, type CHG at the “Select ROI Management Menu Option:” prompt.
2. Type the name of the desired requesting party at the “Select ROI Req Rec Party Name:” prompt.
3. Type the new spelling at the “Name:” prompt and press the Return key to record your changes.
4. Type another receiving party’s name at the next “Select ROI Req Rec Party Name:” prompt.
5. When you have no more names to correct, press the Return key at a blank “Select Req Rec Party Name:” prompt.

```
Select ROI REQ REC PARTY NAME:      JOHNSON, CAROLYN
NAME: JOHNSON, CAROLYN// JOHNSON, KAROL

Select ROI REQ REC PARTY NAME:
```

Figure 5-3: Changing spelling

5.2 Edit Disclosure Date Initiated Only (EDT)

Use this option to edit the date the request was initiated.

The user is prompted for a disclosure number or date. When the date prompt is displayed, change the date to the correct date.

1. To edit the disclosure date initiated, type EDT at the “Select ROI Management Menu Option:” prompt.
2. Type the date at the “Select ROI Disclosure Date Request Initiated:” prompt.
3. Type the new date at the “Date Request Initiated:” prompt and press the Return key to record your changes.
4. Type another receiving date to edit at the next “Select ROI Disclosure Date Request Initiated:” prompt.
5. When you have no more dates to correct, press the Return key at a blank “Select ROI Disclosure Date Request Initiated:” prompt.

```
Select ROI DISCLOSURE DATE REQUEST INITIATED:      5-30-2001      30182183
WYCLIFFE, JOHNNY, JR.

DATE REQUEST INITIATED: MAY 30, 2001// 5-31-01 (MAY 31, 2001)

Select ROI DISCLOSURE DATE REQUEST INITIATED:
```

Figure 5-4: Editing the disclosure date

5.3 Enter or Edit Requesting/Receiving Parties (PE)

Use this option to build the requesting and Receiving Party Table file entries through a menu option, rather than when entering the time of request. Table file entries can also be modified using this option.

1. To enter or edit requesting/receiving parties, type PE at the “Select ROI Management Menu Option:” prompt.
2. Type the name of the requesting party at the “Select ROI Req Rec Party Name:” prompt. If you are adding a new entry, you will be asked if a new entry is being added to the Table File.
3. Type responses to the prompts as they appear on your screen.

```
Select ROI REQ REC PARTY NAME: FALLON SCHOOL DISTRICT

MNEMONIC: FSD
STREET/PO BOX: 122345 AVE
CITY: PHOENIX
STATE: ARIZONA
ZIP: 59880
Select CONTACT TYPE: WORK
                PHONE NUMBERS: (602) 345-8765
                EXTENSION NUMBER: 78

Select CONTACT TYPE:
```

Figure 5-5: Entering or editing requesting/receiving parties

5.4 Print Listing of all Parties (PRT)

Use this option to print all table file entries of the ROI requesting and/or receiving parties.

1. To print a list of all parties, type PRT at the “Select ROI Management Menu Option:” prompt.
2. Type the name of a print device at the “Device:” prompt.

```
DEVICE:

ROI REQ REC PARTY LIST                                APR 17, 2000  11:52    PAGE 1
-----
NAME: BROWN, JAMES ATTORNEY

NAME: DEWEY CHEATUM AND HOWE                        MNEMONIC: DC
STREET/PO BOX: 40 S. CENTRAL                        CITY: PHOENIX
```

STATE: ARIZONA	ZIP: 85004
CONTACT TYPE: HOME	PHONE NUMBERS: (602) 307-9322
CONTACT TYPE: WORK	PHONE NUMBERS: (602) 364-5268
EXTENSION NUMBER: M	
CONTACT TYPE: MESSAGE	PHONE NUMBERS: (602)333-333
CONTACT TYPE: PAGER	PHONE NUMBERS: (602 444-5555
NAME: DRINKING WATER	
NAME: FALLON SCHOOL DISTRICT	
STREET/PO BOX: 1234 E. FILLMORE	MNEMONIC: FSD
STATE: ARIZONA	CITY: PHOENIX
CONTACT TYPE: WORK	ZIP: 85004
EXTENSION NUMBER: 223	PHONE NUMBERS: 224-5555
CONTACT TYPE: HOME	PHONE NUMBERS: 222-3333
NAME: P.I.M.C.	
STATE: ARIZONA	CITY: PHOENIX
CONTACT TYPE: HOME	ZIP: 85004
EXTENSION NUMBER: 334	PHONE NUMBERS: (602) 364-5268

Figure 5-6: Printing a list of all parties

5.5 Inquire to a Specific Requesting Party (RR)

Use this option to display one requesting or receiving party table file entry at a time.

1. To inquire to a specific requesting party, type RR at the "Select ROI Management Menu Option:" prompt.
2. Type the name of the requesting party at the "Select ROI Req Rec Party Name:" prompt.
3. Type the name of a print device at the "Device:" prompt.

```
Select ROI REQ REC PARTY NAME:  FALLON SCHOOL DISTRICT
DEVICE:
ROI REQ REC PARTY LIST                APR 17, 2000  11:56    PAGE 1
-----
NAME: FALLON SCHOOL DISTRICT          MNEMONIC: FSD
STREET/PO BOX: 1234 E. FILLMORE      CITY: PHOENIX
STATE: ARIZONA                       ZIP: 85004
CONTACT TYPE: WORK                   PHONE NUMBERS: 224-5555
EXTENSION NUMBER: 223
CONTACT TYPE: HOME                   PHONE NUMBERS: 222-3333
```

Figure 5-7: Inquiring to a specific requesting party

5.6 Enter or Edit Site Parameter (SITE)

Use this option to complete a one-time setup for each receiving facility. This option allows for entry of multiple facilities and provides separate sequential numbering of requests per facility

1. Type the name of the facility you are editing at the “Select ROI Site Parameter Facility Name:” prompt.
2. Type either **UNIVERSAL** or **SITE SPECIFIC** at the “Universal/Site Specific:” prompt. Universal allows universal lookup of individual facility’s health record numbers.

Select ROI SITE PARAMETER FACILITY NAME: PARKER HOSP
UNIVERSAL/SITE SPECIFIC: UNIVERSAL

Figure 5-8: Entering or editing site parameters

6.0 Glossary

ASUFAC number	Area Service Unit Facility; A unique identifier for each facility within IHS. A six-digit number comprised of 2 digits for Area, 2 digits for Service Unit, and 2 digits for Facility.
AZXA	Previous namespace of v1.0 of the Release of Information Disclosure System.
Banner	A line of text with a user's name and domain.
BRN	Namespace for the Release of Information Disclosure System.
Default Facility	A user selects a facility identification to work with patients registered to that facility.
Device	A device that either displays or prints information.
Entry Point	Entry point within a routine that is referenced by a "DO" or "GOTO" command from a routine internal to a package.
File	A set of related records or entries treated as a single unit.
FileMan	The database management system for RPMS.
FOIA	Freedom of Information Act
Forward Slashes	(//) Usually preceding a default entry.
Global	In MUMPS, global refers to a variable stored on disk (global variable) or the array to which the global variable may belong (global array).
Health Record Number (HRN)	Each facility assigns a unique number within that facility to each patient. Each HRN with its facility identification 'ASUFAC' make a unique identifier within all of IHS.
INDEX (%INDEX)	A Kernel utility used to verify routines and other MUMPS code associated with a package. Checking is done according to current ANSI MUMPS standards and RPMS programming standards. This tool can be invoked through an option or from direct mode (>D ^%INDEX).

Init	Initialization of an application package. The initialization step in the installation process builds files from a set of routines (the init routines). Init is a shortened form of initialization.
Kernel	The set of MUMPS software utilities that function as an intermediary between the host operating system and application packages, such as Laboratory and Pharmacy. The Kernel provides a standard and consistent user and programmer interface between application packages and the underlying MUMPS implementation. These utilities provide the foundation for RPMS.
Mandatory	Required. A mandatory field is a field that must be completed before the system will allow you to continue.
Menu	A list of choices for computing activity. A menu is a type of option designed to identify a series of items (other options) for presentation to the user for selection. When displayed, menu-type options are preceded by the word "Select" and followed by the word "option" as in Select Menu Management option: (the menu's select prompt).
Mnemonic	A short cut that designated to access a particular party, name, or facility.
Namespace	A unique set of 2 to 4 alpha characters that are assigned by the database administrator to a software application.
Non-Critical	Not critical, does not require immediate attention.
Official Registering Facility	A facility so designated that when HRNs are added/modified, those changes are sent to the central database. A Service Unit may have several satellites for which it is registering patients.
Option	An entry in the Option file. As an item on a menu, an option provides an opportunity for users to select it, thereby invoking the associated computing activity. Options may also be scheduled to run in the background, non-interactively, by TaskMan.
Party	A person or a group
Queuing	Requesting that a job be processed at a later time rather than within the current session.
Receipt dates	The date that the party received the information

Receiving Party	The person or organization that is receiving the information.
Return key	Press the Return key to show the end of an entry such as a number or a word. Press the Return key each time you respond to a computer prompt. If you want to return to the previous screen, simply press the Return key without entering a response. This will take you back to the previous menu screen. The Return key on some keyboards are shown as the Enter Key. Whenever you see [RET] or the Return key, press the Return or Enter Key.
Routine	A program or sequence of instructions called by a program that may have some general or frequent use. MUMPS routines are groups of program lines that are saved, loaded, and called as a single unit via a specific name.
Sequential	Arranged in a particular order
Site Specific	Particular to a specific site
STAT	Immediately
Tagged	Marked with a specific identifier
UCI	User Class Identification: a computing area.
Up-Hat (^)	A circumflex, also know as a “hat” or “caret,” that is used as a piece delimiter in a global. The up-hat is denoted as “^” and is typed by pressing Shift+6 on the keyboard.
Utility	A callable routine line tag or function. A universal routine usable by anyone.
Variable	A character or group of characters that refers to a value. MUMPS recognizes 3 types of variables: local variables, global variables, and special variables. Local variables exist in a partition of the main memory and disappear at sign-off. A global variable is stored on disk, potentially available to any user. Global variables usually exist as parts of global arrays.

7.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the ITSC Help Desk by:

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