



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Release of Information Disclosure System (BRN)

User Manual

Version 2.0 Patch 1
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Division of Information Resource Management
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 statuses 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.

Newly added enhancements in patch 1 include:

1. Facility is now stored for each request and has been added as a choice in printing the ROI reports, for multi-division sites.
2. Intro logo now lists latest patch # installed and date installed.
3. Added option to print mailing labels for receiving parties with disclosure dates.
4. Added new option (AMP – Add Multiple Patients Under One Request) that allows you to enter the requesting party information once when the request is for multiple patients.
5. New ROI Reporting Utility. Much like VGEN and PGEN in PCC, this allows a facility to build customized reports on the ROI data, thus eliminating the wait for newly requested reports.
6. New field added: Request Method. Choices are In Person, Telephone Call, Regular Mail, Electronic Mail, and Fax. Field has been added to data entry options and the following reports: Print All Disclosures w/2nd and/or 3rd Requests, Inquire to a Specific Disclosure Record and Print Open Disclosures Only.
7. "Inquire to a Specific ROI Disclosure Record" option is now easier to read and displays patient's chart #.
8. Updated data entry process:
 - a. If you enter and close a disclosure in one step, you are now asked for NUMBER OF PAGES and COST PER PAGE when a disclosure date is entered for a receiving party.
 - b. If you do not enter a DISCLOSURE DATE for a receiving party, you will not be asked the other questions (Record Dissemination, # of Pages and Cost per Page).
 - c. ONLY if TYPE=OTHER will you be asked for OTHER TYPE DESCRIPTION.
9. AGING REPORTS are now grouped under one menu option. Two new Aging Reports have been added: by Staff Assignment and by Purpose.
10. "Priority Request Report – By Status" has been modified to display patient's chart # instead of a partial disclosure number. Also, report title has been fixed: used to say FOIA report which it is not.

11. "Print User Workload by Date Range" has been enhanced. You now have a choice to run it for a user who Initiated request, who was Assigned request, or who Closed request. You can select one user or run for all.
12. New choice has been added to PURPOSE. It is DISABILITY.
13. Adding and Editing of Requesting and Receiving Parties is now controlled. New parties can only be added under the ROI Management Menu. That is also the only place to update addresses and phone numbers. You can now INACTIVATE a party too.

<p>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.</p>

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. Also with patch 1, the new option for an ad hoc reporting utility has been added.

```
*****
*          INDIAN HEALTH SERVICE          *
*    RELEASE OF INFORMATION SYSTEM        *
*    VERSION 2.0 P1, Jan 20, 2008        *
*****
          TEST HOSPITAL
    RELEASE OF INFORMATION SYSTEM

DE    ROI EDIT MENU ...
RPT   ROI REPORTS MENU ...
MGT   ROI MANAGEMENT MENU ...
RRU   ROI REPORTING UTILITY

Select RELEASE OF INFORMATION SYSTEM Option:
```

Figure 2-1: ROI main menu

3.0 ROI 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 P1, Jan 20, 2008      *
*****

          TEST HOSPITAL
          RELEASE OF INFORMATION SYSTEM

DE      ROI EDIT MENU ...
RPT     ROI REPORTS MENU ...
MGT     ROI MANAGEMENT MENU ...
RRU     ROI REPORTING UTILITY

Select RELEASE OF INFORMATION SYSTEM Option: DE

```

Figure 3-1: Using the main menu

- The ROI Edit Menu will be displayed (Figure 3-2). Sections 3.1 through 3.12 explain each of the options listed in this menu.

```

*****
*          INDIAN HEALTH SERVICE          *
*      RELEASE OF INFORMATION SYSTEM      *
*      VERSION 2.0 P1, Jan 20, 2008      *
*****

          TEST HOSPITAL
          ROI EDIT MENU

ADD      Add a New Disclosure Record
AMP      Add Multiple Patients Under One Request
MOD      Edit Existing Disclosure Record
DIS      Enter Disclosure Documentation
LBL      Print Mailing Labels
DEL      Delete Open Disclosure Records
AREQ     Enter Additional Request Receipt Dates (2nd/3rd)
DDL      PATIENT Detail Disclosure Log (Cumulative)
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.

Important: Requesting and receiving parties must already be defined under the “Enter or Edit Requesting/Receiving Parties” option on the ROI Management Menu. They can no longer be added on-the-fly. This new feature was added with patch 1 to help sites better control the entries in the file.

1. To add a new disclosure request, type ADD at the prompt in the ROI Edit Menu.
2. Type the patient’s name or Health Record Number (HRN) 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: PATIENT,N

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

04/11/00 290646      PATIENT,N      PATIENT
                   04/15/00      Purpose:  OTHER
                   Status: CLOSED  Type:    MEDICAL RECORD

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

04/07/00 290639      PATIENT,N      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 of TODAY at the “Date Request Initiated:” prompt.
6. The system will automatically assign a disclosure number and display it before moving to the next data field.
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.
9. Type the name of the requesting party at the “Requesting Party:” prompt. The requesting party must already be on the list.
10. Type a purpose at the “Purpose:” prompt. You can select from:
 - Further Medical Care
 - Insurance
 - Attorney
 - Personal
 - School
 - Tort
 - FOIA
 - Subpoena
 - Other
 - Disability

DATE REQUEST INITIATED: TODAY// [RET]

DISCLOSURE NUMBER: 290647

TYPE: **OTHER**

OTHER TYPE DESCRIPTION: (Only appears if OTHER was chosen as TYPE)

REQUESTING PARTY: **COUNTY HEALTH DEPARTMENT**

PURPOSE: **FURTHER MEDICAL CARE**

Figure 3-4: Adding a new disclosure (steps 5-10)

11. Type the request priority at the “Request Priority:” prompt. Choose either **STAT** or **Non-Critical**.
12. 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 to bypass.
13. Type **YES** or **NO** at the “Entire Record:” prompt. Type **YES** only if the entire record is sent.
14. If the disclosure is *not* to include the entire record, type the visit date range at the “Beginning Event Date:” and “Ending Event Date:” prompts. These fields are not mandatory.
15. 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). This is only asked if the entire record is *not* being sent.

```
REQUEST PRIORITY: NON-CRITICAL

STAFF ASSIGNMENT: CLERK,B

ENTIRE RECORD:

BEGINNING EVENT DATE: 1-1-2000
ENDING EVENT DATE: 1-4-2000

SPECIFIC RECORD INFORMATION: LAB RESULTS ONLY
```

Figure 3-5: Adding a new disclosure (steps 11-15)

16. Enter any other additional useful information at the “Disclosure Notes:” prompt. This field is not required. This is a word processing field for which you must answer **YES** to enter the Screen Editor function.
17. Type the name of the party who is receiving this information at the “Select Receiving Party:” prompt. This party may or may not be the same party requesting this information. The receiving party must already be on the list which is updated using the “Enter or Edit Requesting/Receiving Parties” option on the ROI Management Menu.
18. Type the date the information was disclosed at the “Disclosure Date:” prompt. If the request has just been made and the disclosure not yet been sent, leave this prompt blank.
19. If a disclosure date was entered, 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
20. If this is a First Party Request, answer **YES** at that prompt.
21. 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:
Is this a First Party Request?: NO
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 3-6: Adding a new disclosure (steps 16-21)

3.2 Add Multiple Patients Under One Request (AMD)

Use this option when a request from one requesting party is for information on multiple patients. You only answer the main request information once for all the patients and then the specific information for each patient.

```

DATE REQUEST INITIATED: TODAY//
TYPE: MEDICAL RECORD
REQUEST METHOD: REGULAR MAIL
REQUESTING PARTY: COUNTY HEALTH DEPARTMENT
PURPOSE: A DISABILITY
REQUEST PRIORITY: NON-CRITICAL// NON-CRITICAL
Select PATIENT: PATIENT,MANUEL
PATIENT,MANUEL <A> M 03-31-1992 000060783 THC
104063
Do you want to continue with adding a new Disclosure? YES// [RET]

DISCLOSURE NUMBER: 157619
STAFF ASSIGNMENT: NURSE,A
ENTIRE RECORD: YES (or bypass and enter encounter dates)
DISCLOSURE NOTES:
No existing text
Edit? NO// (YES to type in notes on this patient's request)
Is this a First Party Request?: NO
Select RECEIVING PARTY: COUNTY HEALTH DEPARTMENT
Are you adding 'COUNTY HEALTH DEPARTMENT' as
a new RECEIVING PARTY (the 1ST for this ROI LISTING RECORD)? No// YES
DISCLOSURE DATE: [RET] unless already disclosed
Select RECEIVING PARTY: (May enter another receiving party here)

Select Another PATIENT: (Now enter information on the next patient)

```

Figure 3-7: Adding multiple patients under one request

3.3 Edit Existing Disclosure Record (MOD)

Use this option to modify an existing disclosure record. You may select the existing record by entering the date the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN. Once the desired record is selected, you can

change any of the existing field values (which are displayed with the current value and two forward slashes [/]).

1. To edit an existing disclosure record, type **MOD** at the prompt in the ROI Edit Menu.
2. To select an existing record, type the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN 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
PATIENT,N      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]
PURPOSE: FOIA// SCHOOL
REQUEST PRIORITY: NON-CRITICAL// STAT
STAFF ASSIGNMENT: CLERK,B//[RET]
ENTIRE RECORD: [RET]
BEGINNING EVENT DATE: JAN 1,2000//[RET]
ENDING EVENT DATE: APR 13,2000//[RET]
SPECIFIC RECORD INFORMATION: [RET]
DISCLOSURE NOTES:
      No existing text
      Edit? NO//[RET]
Is this a First Party Request?: NO// [RET]
Select RECEIVING PARTY: FALLON SCHOOL DISTRICT//[RET]

Select RECEIVING PARTY: [RET]
```

Figure 3-8: Editing an existing disclosure

3.4 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 entering the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN.

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 Edit Menu.

2. Type the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the receiving party's name (either from the existing list for this request or add a new receiving party) or press the Return key to edit the current entry.
4. Type the date of disclosure at the "Disclosure Date:" prompt.
5. Type how the disclosure was completed 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
6. Type the number of individual pages that were copied at the "Number of Pages:" prompt.
7. Type the cost of each copy page at the "Cost per Page:" prompt.
8. 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.

```
Select ROI DISCLOSURE DATE REQUEST INITIATED: 4-13-2000      290647
PATIENT,N      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
        E      ELECTRONIC
RECORD DISSEMINATION: MC MAIL CERTIFIED
NUMBER OF PAGES:      50
COST PER PAGE:      .10

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

3.5 Print Mailing Labels (LBL)

Use this option to print mailing labels for any disclosure record with a disclosure date defined. The mailing labels are set up in the same format as patient address labels in Patient Registration.

```

Select Disclosure:  PATIENT,R      COUNTY HEALTH DEPARTMENT
COUNTY HEALTH DEPARTMENT added to list

Select Disclosure:  (Enter another disclosure here)

How many COPIES of each label:  (1-5): 1// 2

                (NOTE: Mailing Labels need to be loaded in the printer.)
DEVICE:  (Type in printer name once lables are loaded)

```

Figure 3-10: Printing mailing labels

3.6 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 the disclosure number, patient name, or patient HRN. The disclosure and verification message are displayed to ensure 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 the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN 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      PATIENT,A
May 25, 2000 15:42:45

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

Page:      1 of      3
User:  USER,A
*****

```



```

Patient Name:          PATIENT,A
Chart #:              78910
Date of Birth:        MAR 01, 1949
Sex:                  F
===== DISCLOSURE RECORD =====
DATE REQUEST INITIATED:  APR 07, 2000
DISCLOSURE NUMBER:      290637
PATIENT:                PATIENT,A
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:       CLERK,B
USER INITIATED:         CLERK,A
USER COMPLETED:        CLERK,B
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:        PATIENT
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 3-11: Deleting an open disclosure

3.7 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 the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN at the "Select ROI Disclosure Date Request Initiated:" prompt.
3. Type the second request date at the "2nd Request Date:" prompt. Then type the method used to send in the 2nd request.
4. Type the third request date at the "3rd Request Date:" prompt. Then type the method used to send in the 3rd request.

```
Select ROI DISCLOSURE DATE REQUEST INITIATED: 29062 3-6-2000 29062
PATIENT,A
        SHROEDER,RICKY ATTORNEY
2ND REQUEST DATE: 5-1-00 (MAY 01, 2000)
2ND REQUEST METHOD: FAX
3RD REQUEST DATE:
3RD REQUEST METHOD:
```

Figure 3-12: Entering additional request dates

3.8 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 requests.

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: PATIENT,A F 03-01-1949 000044584 PAH 78910
DEVICE: (Type in HOME or printer name)

**CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
ROI CUMMULATIVE PATIENT RECORD OCT 30,2001 PAGE 1
PATIENT,A -HR#: 78910 RECORD INFORMATION REC PTY DATE DISC
-----
```

03/16/00	290626	TENN P.I.M.C.	FURTHER MEDI	MEDICAL RE	
04/07/00	290637	PATIENT 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 3-13: Printing a Patient Detailed Disclosure log

3.9 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 the disclosure number, the date of disclosure, the patient's name, or the patient's HRN. 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 Edit Menu.
2. Type the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN 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:  PATIENT,C
DEVICE: (Type HOME to view on screen or printer name)

          **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
INQUIRE TO ROI REQUEST RECORD                      FEB 14,2008  09:29      PAGE 1
-----
DISCLOSURE #157615      Initiated On JAN 16,2008 by TELEPHONE CALL
REQUEST STATUS: OPEN                      PRIORITY: NON-CRITICAL
PATIENT: PATIENT,C      (#102585)
FACILITY: TAOS-PICURIS HEALTH CENTER
REQUESTING PARTY: COUNTY HEALTH DEPARTMENT
PURPOSE: SCHOOL
TYPE: MEDICAL RECORD
TESTING

INITIATED BY: CLERK,B                      ASSIGNED TO: CLERK,C
COMPLETED BY:                          CLOSED:
DISCLOSURE NOTES:

2ND REQUEST: FEB 14,2008                      2ND REQUEST METHOD: FAX

```

```

RECEIVING PARTY: COUNTY HEALTH DEPARTMENT
DISCLOSURE DATE:
DISSEMINATION:

```

Figure 3-14: Inquiring to a specific ROI record

3.10 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, the date received, the requesting party, the type of disclosure, and the disclosure status.

1. To display a brief listing, type **PTC** at the prompt in the ROI 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: PATIENT,N
Do You Wish to print SUSPENDED Disclosures? NO// [RET]
DEVICE:

      **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
CUMMULATIVE DISCLOSURE RECORDS FOR: PATINET,N
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 DISTRIC	P	C

Figure 3-15: Displaying a brief listing

3.11 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 Edit Menu.

2. Type the date that the disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN 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 3-16: Editing a request status

3.12 Enter Patient Address (if different from Pt Reg) (ADDR)

Use this option only if the Receiving Party is PATIENT or SELF and the mailing address is different than Patient Registration for this specific disclosure.

```
Select ROI LISTING RECORD DATE REQUEST INITIATED: PATIENT,N  
PATIENT MAILING STREET/PO BOX:  
PATIENT MAILING CITY:  
PATIENT MAILING STATE:  
PATIENT MAILING ZIP:
```

Figure 3-17: Entering patient address

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

This 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 Edit menu.
2. Type date disclosure was initiated, the disclosure number, the patient's name, or the patient's HRN 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 sate 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 3-18: 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 P1, Jan 20, 2008      *
*****
          TEST HOSPITAL
          RELEASE OF INFORMATION SYSTEM

DE      ROI EDIT MENU ...
RPT     ROI REPORTS MENU ...
MGT     ROI MANAGEMENT MENU ...
RRU     ROI REPORTING UTILITY

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 4.14 explain each of the options listed in this menu.

```

*****
*          INDIAN HEALTH SERVICE          *
*      RELEASE OF INFORMATION SYSTEM      *
*      VERSION 2.0 P1, Jan 20, 2008      *
*****
          TEST HOSPITAL
          ROI REPORTS MENU

2ND     Print All Disclosures W/2nd and/or 3rd Requests
AGE     Print AGING REPORTS
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. The request method for each request is also listed.

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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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)

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC

Select Facility: TEST HOSPITAL
=====
DEVICE: (Type in HOME to view on screen OR printer name)

**CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
2ND & 3RD DISCLOSURE REQUESTS                OCT 30,2001  14:27    PAGE 1

1ST      DISCLOSURE
REQUEST   NUMBER      STATUS   REQUESTING PARTY    REQUEST METHOD      2ND / 3RD
-----
FACILITY: TEST HOSPITAL
02/29/00   29061        CLOSED   FT. PECK TRIBE      FAX
                                     TELEPHONE CALL      10/04/01

03/06/00   29062        CLOSED   LOCAL ATTORNEY      REGULAR MAIL
                                     FAX                  05/01/00
                                     TELEPHONE CALL       05/15/00

```

Figure 4-3: Printing all disclosures

4.2 Print Aging Reports (AGE)

Use this report to print one of the four reports based on the age of the disclosure request. The following reports are available:

```

Select one of the following:
    1          By Request STATUS
    2          By AGING Range
    3          By STAFF Assignment
    4          By PURPOSE
Select a Report:

```

Figure 4-4: Menu options for printing aging reports

4.2.1 By Request Status

The By Request Status Aging Report prints disclosures based on their current status (Open, Hold, Closed, or Denied). It displays the disclosure number, disclosure status, date received, receiving party(s), the date disclosed (if any), the request priority, purpose, and staff assignment. 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. Then select 1 from the list of reports.
2. Type **YES** or **NO** at the "Would You Like to Include Only a Particular ROI Disclosure Status in this Report?" prompt.
3. If you answered **YES**, type the status you are interested in at the "Enter the Status:" prompt.
4. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

```

DEVICE: (Type in HOME to view on screen OR printer name)									
AGING REPORT **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**									
JUL 5,2000 16:23 PAGE 1									
DISC #	ST	DT REC'D	RECEIVING	AGE	DISC DT	P	PURPOSE	STAFF	
29062	H	03/06/00	LOCAL ATTOR	1	03/07/00	N	ATTORNEY	CLERK,B	
29064	H	03/07/00	FT. PECK TR	0	03/07/00				
			PATIENT	0	03/07/00	N	SUBPOENA	CLERK,B	
29068	H	03/01/00	LOCAL ATTOR	126		N	ATTORNEY	CLERK,D	
290610	H	01/15/97	INSURANCE CO	1267		N	ATTORNEY	CLERK,A	

Figure 4-5: Printing aging report by status

4.2.2 By Aging Range

Use the By Aging Range 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, purpose, and staff assignment. 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. Then select 2 from the list of reports.
2. Type **YES** or **NO** at the "Would You Like to Include a Particular Aging Starting Range?" prompt.
3. If you answered **YES**, type the number of days you would like to start at the "Enter the Number Starting Point:" prompt.
4. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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 +**

```

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====
DEVICE:

AGING REPORT      **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                JUL  5,2000  16:30      PAGE 1

DISC #   ST   DT REC'D   RECEIVING      AGE   DISC DT   P   PURPOSE   STAFF
-----
29068    C    03/01/00   LOCAL ATTOR    126    04/13/00  N   ATTORNEY   CLERK,D
290610   H    01/15/97   INSURANCE CO   1267              N   ATTORNEY   CLERK,A

```

Figure 4-6: Printing an aging report by a selected aging range

4.2.3 By Staff Assignment

The By Staff Assignment Aging Report prints disclosures based on which staff member was assigned to handle the request. It displays the disclosure number, disclosure status, date received, receiving party(s), the date disclosed (if any), the request priority, purpose, and staff assignment. 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. Then select 3 from the list of reports.
2. Type **YES** or **NO** at the "Would You Like to Include Only a particular staff member in this Report?" prompt.
3. If you answered **YES**, type the status you are interested in at the "Enter the Status:" prompt.
4. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. Type the name of a print device at the "Device:" prompt.

```

Would you like to run this report for ONLY a particular staff member? NO//
YES

Select STAFF ASSIGNED: CLERK,B
=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type in HOME to view on screen OR printer name)

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

DISC #  ST  DT REC'D   RECEIVING    AGE   DISC DT   P   PURPOSE   STAFF
-----
29062   C   03/06/00   LOCAL ATTOR   1     03/07/00   N   ATTORNEY   CLERK,B
29064   C   03/07/00   FT. PECK TR   0     03/07/00
                        PATIENT       0     03/07/00   N   SUBPOENA   CLERK,B

```

Figure 4-7: Printing aging report by staff assignment

4.2.4 By Purpose

The By Purpose Aging Report prints disclosures based on which staff member was assigned to handle the request. It displays the disclosure number, disclosure status, date received, receiving party(s), the date disclosed (if any), the request priority, purpose, and staff assignment. 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. Then select 4 from the list of reports.
2. Type **YES** or **NO** at the "Would You Like to Include Only one PURPOSE in this Report?" prompt.
3. If you answered **YES**, type the status you are interested in at the "Enter the Status:" prompt.
4. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. Type the name of a print device at the "Device:" prompt.

```

Would you like to run this report for ONLY one PURPOSE? NO// YES

Select PURPOSE: DISABILITY

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type in HOME to view on screen OR printer name)

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

DISC #  ST  DT REC'D   RECEIVING    AGE   DISC DT   P  PURPOSE    STAFF
-----
29062   C   03/06/00   LOCAL ATTOR   1     03/07/00   N  DISABILITY  CLERK,B
29064   C   03/07/00   FT. PECK TR   0     03/07/00
                        PATIENT       0     03/07/00   N  DISABILITY  CLERK,B

```

Figure 4-8: Printing aging report by purpose

4.3 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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)

```

```

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type in HOME to view on screen OR printer name)

ROI DISCLOSURE STATISTICS                                OCT 30,2001  14:36    PAGE 1
PURPOSE
-----
SUBCOUNT  5      PURPOSE: FURTHER MEDICAL CARE
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 4-9: Printing a count of closed disclosures

4.4 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 ROI Edit 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:  PATIENT,A          F 03-01-1949 000044584   PAH 78910

DEVICE:  (Type in HOME or printer name)

      **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
ROI CUMMULATIVE PATIENT RECORD              OCT 30,2001          PAGE    1
  PATIENT,A -HR#: 78910      RECORD INFORMATION      REC PTY      DATE DISC
-----
03/16/00    290626      TENN
              P.I.M.C.          FURTHER MEDI  MEDICAL RE
04/07/00    290637      PATIENT
              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 4-10: Printing a detailed patient disclosure log

4.5 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. Type the name of a print device at the "Device:" prompt.

```

Enter beginning ROI Initiated Date:  1-1-1998

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

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type in HOME to view on screen OR printer name)

CLOSED DISCLOSURES - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                        APR 13,2000  13:48      PAGE 1
DISCLOSURE  REQUESTING      USER      USER      RECEIVING      DISCLOSURE
NUMBER      PARTY           INITIATED  COMPLETED  PARTY           DATE
-----
29067       FT. PECK TRIB  CLERK,B   CLERK,B   BROWN,JAMES A  08/27/98
290619      P.I.M.C.             CLERK,B   CLERK,B   P.I.M.C.       11/26/99
290618      NIKE CORPORAT  CLERK,B   CLERK,B   NIKE CORPORAT  01/02/00
290618      NIKE CORPORAT  CLERK,B   CLERK,B   DRINKING WATE  01/03/00
290612      DRINKING WATE  MGR,TWO   CLERK,B   DRINKING WATE  02/24/00
                                   NIKE CORPORAT  02/24/00

```

Figure 4-11: Printing a closed disclosure record

4.6 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 and can be selected for only one facility in multi-division systems.

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
-----
SUBCOUNT      2      PURPOSE: FURTHER MEDICAL CARE
                  PURPOSE: INSURANCE

```


SUBCOUNT	6	PURPOSE: PERSONAL
SUBCOUNT	1	PURPOSE: SCHOOL
SUBCOUNT	7	PURPOSE: TORT
SUBCOUNT	1	PURPOSE: OTHER
SUBCOUNT	1	
COUNT	18	

Figure 4-12: Printing total number of first party requests

4.7 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 HRN 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:  PATIENT,C
DEVICE: (Type HOME to view on screen or printer name)

                **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
INQUIRE TO ROI REQUEST RECORD                      FEB 14,2008  09:29      PAGE 1
-----
DISCLOSURE #157615      Initiated On JAN 16,2008 by TELEPHONE CALL
  REQUEST STATUS: OPEN                      PRIORITY: NON-CRITICAL
    PATIENT: PATIENT,C      (#102585)
    FACILITY: TAOS-PICURIS HEALTH CENTER
REQUESTING PARTY: COUNTY HEALTH DEPARTMENT
    PURPOSE: SCHOOL
      TYPE: MEDICAL RECORD
          TESTING

  INITIATED BY: CLERK,B                      ASSIGNED TO: CLERK,C
    COMPLETED BY:                          CLOSED:
DISCLOSURE NOTES:

    2ND REQUEST: FEB 14,2008                      2ND REQUEST METHOD: FAX

RECEIVING PARTY: COUNTY HEALTH DEPARTMENT
          DISCLOSURE DATE:
DISSEMINATION:

```

Figure 4-13: Inquiring about a specific ROI Disclosure record

4.8 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)

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                  PATIENT,A          DIABETES INFO
                P O BOX 1234          HR# 9190           08/23/02
                TUCSON, ARIZONA 85746  OTHER             DISCLOSURE #: 29062

01/15/00      SALT RIVER CLINIC      PATIENT,B          SCHOOL IMMUNIZATION
                123 GOLD STREET      HR# 7593
                PHOENIX, ARIZONA 85004 FURTHER MEDICAL    DISCLOSURE #: 29061
  
```

Figure 4-14: Printing the Master Log

4.9 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
3. Type the name of a print device at the "Device:" prompt.

```
=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)

**CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
ROI LISTING RECORD LIST                                APR 13,2000  12:12    PAGE 1
-----

                FACILITY: TEST HOSPITAL

DATE REQUEST INITIATED: DEC 30, 1999                DISCLOSURE NUMBER: 29065
PATIENT: PATINET,A                                  TYPE: MEDICAL RECORD
REQUESTING PARTY: LOCAL ATTORNEY
PURPOSE: FURTHER MEDICAL CARE                        REQUEST STATUS: OPEN
REQUEST PRIORITY: NON-CRITICAL                      STAFF ASSIGNMENT: ADAM,ADAM
USER INITIATED: CLERK,B                             ENTIRE RECORD: YES
RECEIVING PARTY: LOCAL ATTORNEY                     DISCLOSURE DATE: JAN 15, 2000
RECORD DISSEMINATION: MAIL CERTIFIED                USER DISSEMINATED: CLERK,B
NUMBER OF PAGES: 5                                  COST PER PAGE: .15
RECEIVING PARTY: DEWEY CHEATUM AND HOWE

DATE REQUEST INITIATED: MAR 05, 2000                DISCLOSURE NUMBER: 29066
PATIENT: PATIENT,B                                  TYPE: MEDICAL RECORD
REQUESTING PARTY: PATIENT                            PURPOSE: PERSONAL
REQUEST STATUS: OPEN                                REQUEST PRIORITY: NON-CRITICAL
USER INITIATED: CLERK,A
RECEIVING PARTY: PATIENT
```

Figure 4-15: Printing open disclosures

4.10 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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)

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)

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 4-16: Printing reproduction page costs report

4.11 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
7. 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
=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====
DEVICE: (Type HOME to view on screen or printer name)

DISCLOSURE LIST  **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                JUL  6,2000  17:00    PAGE 1
                                REQUEST  REQUEST  STAFF
                                PRIORITY STATUS  ASSIGNMENT
-----
03/01/00   12345      MEDICAL RECORD   NON-CRI   HOLD      CLERK,B
03/06/00   22446      MEDICAL RECORD   NON-CRI   HOLD      CLERK,A
03/07/00   114477     MEDICAL          NON-CRI   HOLD      CLERK,B
  
```

Figure 4-17: Printing a priority request report

4.12 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
7. 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

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)
```

USER WORKLOAD - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**					
				JAN 7, 2003 12:53	PAGE 1
DIS#	DATE	USER INITIATED	PATIENT	HRN #	REQUESTING PARTY
29064	11/25/02	CLERK,B	PATIENT,A	1905	FT. PECK TRIBE
290654	06/27/00	CLERK,A	PATIENT,N	2255	FT. PECK TRIBE
290625	03/15/00	CLERK,B	PATIENT,A	1905	RENO DIAGNOSTIC
290639	04/07/00	CLERK,B	PATIENT,A	1905	RENO DIAGNOSTIC
290660	12/05/00	CLERK,M	PATIENT,K	8910	RENO DIAGNOSTIC
COUNT 5					

Figure 4-18: Printing a requesting party report

4.13 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. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
5. 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)

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?
    Answer with ROI LISTING PARAMETER FACILITY NAME
    Choose from:
    TEST HOSPITAL
    IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)

SUSPENDED DISCLOSURES - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**

```

JAN 3, 2003 15:10 PAGE 1						
DIS#	REQUESTING PARTY	USER INITIATED	USER COMPLETED	RECEIVING PARTY	DISC DT	
29067	FT. PECK TRIB	CLERK,B	CLERK,B	LOCAL CLINIC	08/27/98	S
29062	LOCAL ATTORNE	CLERK,B	CLERK,B	LOCAL ATTORNE	03/07/00	
				PATIENT	01/03/03	S

Figure 4-19: Printing suspended disclosures only

4.14 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. Select the user's role you wish to track in this report. Your choices are user who initiated the request, user who was assigned to the request, or user who closed the request.
5. Type either **YES** or **NO** at the "Want to INCLUDE a particular User?" prompt. If you answered **YES**, type the user's name at the "Enter User Name:" prompt.
6. If you are a multi-division site with more than one site set up in the ROI Parameters, you will be asked to choose to print this report for all facilities or just one.
7. 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

    Select one of the following:
        I      User Who INITIATED Request
        A      User Who was ASSIGNED Request
        C      User Who CLOSED Request
Select USER'S ROLE for Workload Reporting: I  User Who INITIATED Request

Want to INCLUDE a particular User? NO// YES
Enter User Name:  CLERK,B

=====
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// (Answer YES or NO; if NO, choose a site =>
Select Facility: ?

```



```

      Answer with ROI LISTING PARAMETER FACILITY NAME
      Choose from:
      TEST HOSPITAL
      IHS CLINIC
Select Facility: TEST HOSPITAL
=====

DEVICE: (Type HOME to view on screen or printer name)

USER WORKLOAD  **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                                APR 13,2000  13:03    PAGE 1
                                REQUESTING
DIS #   STARTED   USER      PATIENT      HRCN      PARTY
                                -----
290635  04/07/00   CLERK,B    PATIENT,A    12345     MEDICAL REVIEW BOARD
290636  04/17/00   CLERK,B    PATIENT,N    5432      LOCAL CLINIC
290637  04/18/00   CLERK,B    PATIENT,K    34345     LOCAL ATTORNEY
290638  04/18/00   CLERK,B    PATIENT,B    54321     PATIENT
290639  04/22/00   CLERK,B    PATIENT,A    12345     MEDICAL DIAGNOSTIC
290640  04/24/00   CLERK,B    PATIENT,P    9988      LOCAL CLINIC
290641  04/30/00   CLERK,B    PATIENT,Y    89898     PATIENT
COUNT      7

```

Figure 4-20: 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 P1, Jan 20, 2008      *
*****

TEST HOSPITAL
RELEASE OF INFORMATION SYSTEM

DE      ROI EDIT MENU ...
RPT     ROI REPORTS MENU ...
MGT     ROI MANAGEMENT MENU ...
RRU     ROI REPORTING UTILITY

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 P1, Jan 20, 2008      *
*****

TEST HOSPITAL
ROI MANAGEMENT MENU

CHG     Change Spelling of Requesting Party
EDT     Edit Date Request Initiated
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; you can 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 Listing 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 Listing Rec Party Name:” prompt.
5. When you have no more names to correct, press the Return key at a blank “Select Listing Rec Party Name:” prompt.

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

Select ROI LISTING REC PARTY NAME:
```

Figure 5-3: Changing spelling

5.2 Edit Date Request Initiated (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. Select the entry at the “Select ROI Listing Record Date Request Initiated:” prompt.
3. Type the new date at the “Date Request Initiated:” prompt.
4. When you have no more dates to correct, press the Return key at the “Select ROI Listing Record Date Request Initiated:” prompt.

```
Select ROI LISTING RECORD 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. With patch 1, staff can no longer add entries at the time of the request. This allows more control on the quality of the data in this table. Table file entries can also be modified using this option. You can also use this option to inactivate entries so they can no longer be used for new requests. Entries cannot be deleted, only inactivated.

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 Listing 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 LISTING REC PARTY NAME: FALLON SCHOOL DISTRICT
NAME: FALLON SCHOOL DISTRICT  Replace
ACTIVE/INACTIVE: ACTIVE//
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: PATIENT                                MNEMONIC: PAT
  ACTIVE/INACTIVE: ACTIVE

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: FAX                          PHONE NUMBERS: 222-3333

NAME: LOCAL CLINIC                          CITY: PHOENIX
  STATE: ARIZONA                            ZIP: 85004
CONTACT TYPE: WORK                          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 Listing Rec Party Name:” prompt.
3. Type the name of a print device at the “Device:” prompt.

```
Select ROI LISTING 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: FAX                          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. If you set up more than one facility in this parameter table, your staff will be asked to choose a facility for each ROI report. Facilities can also be inactivated here.

1. Type the name of the facility you are editing at the “Select ROI Site Parameter Facility Name:” prompt.
2. If you type **UNIVERSAL** at the “Universal/Site Specific:” prompt the software will allow universal lookup of patient Health Record Numbers. This means one staff handles all the requests for multiple sites.

```
Select ROI SITE PARAMETER FACILITY NAME:  TEST HOSPITAL
FACILITY NAME: TEST HOSPITAL//    (No Editing)
UNIVERSAL/SITE SPECIFIC:
PROMPT FOR DEPARTMENT: YES//
INACTIVATION DATE:
```

Figure 5-8: Entering or editing site parameters

6.0 ROI Reporting Utility (RRU)

This option allows you to create ad hoc reports from the ROI data in your system. The format is similar to both the VGEN and PGEN report utilities in the RPMS Patient Care Component (PCC). If you need to report ROI data in such a way that is not already available in the reports on the RPT menu, use this option. Here are snapshots of the setup screens.

```

                                DATE RANGE SELECTION

Enter Beginning Request Date for search:  T-300
Enter Ending Request Date for search:    T

Do you want to use a PREVIOUSLY DEFINED REPORT? NO//

**If you answered YES, you can select the previously defined report here:
REPORT NAME:

```

Figure 6-1: ROI reporting utility date range selection

Select Screening Criteria:

```

Screen Report by . . .      Feb 15, 2008 10:05:18      Page:  1 of  1
                                Disclosure Request Selection Menu
Disclosure requests 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 select all disclosures press Q.

1) Patient Name              10) Request Priority          19) Suspend Started
2) Sex                      11) Only Entire Records      20) Suspend Stopped
3) Age Range                12) Request Method            21) Suspended Requests
4) Community                13) Staff Assignment          22) 2nd Request Date
5) Facility                 14) User Initiated            23) 2nd Request Method
6) Type                     15) User Completed            24) 3rd Request Date
7) Requesting Party         16) Only Congressionals       25) 3rd Request Method
8) Purpose                  17) First Party Request       26) Receiving Party
9) Request Status           18) Date Closed

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 6-2: Screening criteria options available

Example of selecting screening criteria:

```
Select Action: S// S   Select Item(s)

Which disclosure item(s):  (1-26): 8,12

8) Purpose Selection.
ENTER Purpose: SUBPOENA
ENTER Purpose: TORT
ENTER Purpose:

12) Request Method Selection.
ENTER Request Method: FAX
ENTER Request Method: TELEPHONE CALL
ENTER Request Method:

Disclosure Request Selection Criteria:
Request Date range: Feb 15, 2008 to Feb 15, 2008
Purpose: TORT ; SUBPOENA
Request Method: TELEPHONE CALL ; FAX
Press ENTER to continue:
```

Figure 6-3: Selecting screening criteria

Report printing selections:

```
Select one of the following:

T      Total Count Only
S      Sub-counts and Total Count
D      Detailed Listing
L      Delimited Output File for use in Excel

Choose Type of Report: D//
```

Figure 6-4: Printing report

Example of screen to select detailed listing items:

```

Screen Report by . .      Feb 15, 2008 10:11:05      Page:  1 of  1
                        Print Items Selection Menu
The following data items can be printed.  Choose the items in the order you
want them to appear on the printout.  Keep in mind that you have an 80
column screen available, or a printer with either 80 or 132 column width.

```

1) Patient Name	14) Request Priority	27) Suspend Stopped
2) Chart #	15) Entire Record?	28) Suspended Requests
3) Sex	16) Request Method	29) 2nd Request Date
4) Age Range	17) Staff Assignment	30) 2nd Request Method
5) Community	18) User Initiated	31) 3rd Request Date
6) Disclosure #	19) User Completed	32) 3rd Request Method
7) Date Initiated	20) Beginning Event Date	33) Total Pages
8) Facility	21) Ending Event Date	34) Total Cost
9) Type	22) Specific Record Info	35) Disclosure Notes
10) Other Type Description	23) Congressional?	36) Receiving Party
11) Requesting Party	24) First Party Request	37) Recg Party Discl Da
12) Purpose	25) Date Closed	38) Recvg Party Method
13) Request Status	26) Suspend Started	

```

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//      Select Item(s)

Which disclosure item(s):  (1-38): 1,2,7,12,16

```

Figure 6-5: Detailed listing view

Setting up field lengths:

```

Enter Column width for Patient Name (suggested: 20):  (2-80): 20//

                        Total Report width (including column margins - 2 spaces):  22
Enter Column width for Chart # (suggested: 6):  (2-80): 6//

                        Total Report width (including column margins - 2 spaces):  30
Enter Column width for Date Initiated (suggested: 14):  (2-80): 14//

                        Total Report width (including column margins - 2 spaces):  46
Enter Column width for Purpose (suggested: 12):  (2-80): 12//

                        Total Report width (including column margins - 2 spaces):  60
Enter Column width for Request Method (suggested: 15):  (2-80): 15//

                        Total Report width (including column margins - 2 spaces):  77
Press ENTER to continue:

```

Figure 6-6: Field length selection

Example of screen to select sort:

Screen Report by . .	Feb 15, 2008 13:40:09	Page: 1 of 1
<p style="text-align: center;">Sorting Criteria Selection Menu</p> <p>The disclosure requests can be SORTED by ONLY ONE of the following items. If you don't select a sort item, the report will be sorted by Date Request Initi</p>		
1) Patient Name	10) Requesting Party	19) Suspend Started
2) Chart #	11) Purpose	20) Suspend Stopped
3) Sex	12) Request Status	21) 2nd Request Date
4) Age Range	13) Request Priority	22) 2nd Request Method
5) Community	14) Request Method	23) 3rd Request Date
6) Disclosure #	15) Staff Assignment	24) 3rd Request Method
7) Date Initiated	16) User Initiated	25) Total Pages
8) Facility	17) User Completed	26) Total Cost
9) Type	18) Date Closed	
<p style="text-align: center;">Enter ?? for more actions</p>		
S Select Item(s)	+ Next Screen	Q Quit Item Selection
R Remove Item(s)	- Previous Screen	E Exit Report
Select Action: S//		

Figure 6-7: Sorting criteria selection menu

The rest of possible questions to set title, page breaks, and save logic:

Do you want a separate page for each Patient Name? N// O
Would you like a custom title for this report? NO//
Do you wish to SAVE this SEARCH/PRINT/SORT logic for future use? NO//

Figure 6-8: Set title, page break, and save logic selections

Report Summary before printing report:

REPORT SUMMARY

Disclosure Request Selection Criteria:
Request Date range: Feb 15, 2008 to Feb 15, 2008

REPORT/OUTPUT Type:
PRINT Items Selected:
Patient Name - column width 20
Chart # - column width 6
Date Initiated - column width 14
Purpose - column width 12
Request Method - column width 15
Total Report width (including column margins - 2 spaces): 77

SORTING Item:
Disclosure requests will be sorted by: Patient Name

Select one of the following:

P	PRINT Output
B	BROWSE Output on Screen

Do you wish to : P//

Figure 6-9: Report summary

7.0 Glossary

Term	Definition
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.
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.
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.
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.

Term	Definition
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.
Sequential	Arranged in a particular order
Site Specific	Particular to a specific site
STAT	Immediately
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.

8.0 Appendix A: Rules of Behavior

8.1 Specific RPMS Rules of Behavior

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the rules of behavior (RoB) and will have to acknowledge them in accordance IHS policy prior to being granted access to a RPMS system. The RPMS system is a United States Department of Health and Human Services, Indian Health Service information system that is FOR OFFICIAL USE ONLY. The system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

RPMS users must follow these RoB in addition to the RoB listed in the IHS General User Security Handbook and, if a privileged user, the RoB listed in the IHS Technical and Managerial Handbook.

Important Note: The RoBs listed in this document are specific to RPMS. For a listing of general RoB for all users, please see the IHS General User Security Handbook and for a listing of system administrators/managers rules, the IHS Technical and Managerial Handbook located at <http://home.ihs.gov/ITSC-CIO/security/secpgm/ITproced.cfm>.

8.1.1 All RPMS Users

In addition to these rules, each application may include additional RoBs, which may be defined within the individual application's documentation (e.g., PCC, Dental, Pharmacy).

8.1.1.1 Access

RPMS Users Shall:

- ✓ Only use data for which you have been granted authorization.
- ✓ Only give information to personnel who have access authority and have a need to know.
- ✓ Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer *before* providing any type of information system access, sensitive information, or non-public agency information.
- ✓ Be aware that personal use of information resources is authorized on a limited basis within the provisions Indian Health Manual Chapter 6 OMS Limited Personal Use of Information Technology Resources TN 03-05," August 6, 2003.

Users Shall Not:

- X Retrieve information for someone who does not have authority to access the

information.

- X** Access, research, or change any user account, file, directory, table, or record not required to perform your OFFICIAL duties.
- X** Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- X** Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their job or by divulging information to anyone not authorized to know that information.

8.1.1.2 Logging On To the System

RPMS Users Shall:

- ✓ Have a unique User Identification/Account name and password.
- ✓ Be granted access based on authenticating the account name and password entered.
- ✓ Be locked out of an account after 5 successive failed login attempts within a specified time period (e.g., one hour).

8.1.1.3 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

Users Shall:

- ✓ Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the function they perform such as system administrator or application administrator.
- ✓ Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

8.1.1.4 Accountability

Users Shall:

- ✓ Behave in an ethical, technically proficient, informed, and trustworthy manner.
- ✓ Logout of the system whenever they leave the vicinity of their PC.
- ✓ Be alert to threats and vulnerabilities in the security of the system.
- ✓ Report all security incidents to their local Information System Security Officer (ISSO)
- ✓ Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- ✓ Protect all sensitive data entrusted to them as part of their government

employment.

- ✓ Shall abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior and IT information processes.

8.1.1.5 Confidentiality

Users Shall:

- ✓ Be aware of the sensitivity of electronic and hardcopy information, and protect it accordingly.
- ✓ Store hardcopy reports/storage media containing confidential information in a locked room or cabinet.
- ✓ Erase sensitive data on storage media, prior to reusing or disposing of the media.
- ✓ Protect all RPMS terminals from public viewing at all times.
- ✓ Abide by all HIPAA regulations to ensure patient confidentiality.

Users Shall Not:

- X Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- X Store sensitive files on a portable device or media without encrypting.

8.1.1.6 Integrity

Users Shall:

- ✓ Protect your system against viruses and similar malicious programs.
- ✓ Observe all software license agreements.
- ✓ Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- ✓ Comply with all copyright regulations and license agreements associated with RPMS software.

Users Shall Not:

- X Violate Federal copyright laws.
- X Install or use unauthorized software within the system libraries or folders.
- X Use freeware, shareware or public domain software on/with the system without your manager's written permission and without scanning it for viruses first.

8.1.1.7 Passwords

Users Shall:

- ✓ Change passwords a minimum of every 90 days.
- ✓ Create passwords with a minimum of eight characters.
- ✓ If the system allows, use a combination of alpha, numeric characters for

Users Shall:

- passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- ✓ Change vendor-supplied passwords immediately.
- ✓ Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts, or batch files.
- ✓ Change password immediately if password has been seen, guessed or otherwise compromised; and report the compromise or suspected compromise to your ISSO.
- ✓ Keep user identifications (ID) and passwords confidential.

Users Shall Not:

- X Use common words found in any dictionary as a password.
- X Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- X Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- X Reuse passwords. A new password must contain no more than five characters per 8 characters from the previous password.
- X Post passwords.
- X Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- X Give a password out over the phone.

8.1.1.8 Backups**Users Shall:**

- ✓ Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- ✓ Make backups of systems and files on a regular, defined basis.
- ✓ If possible, store backups away from the system in a secure environment.

8.1.1.9 Reporting**Users Shall:**

- ✓ Contact and inform your ISSO that you have identified an IT security incident and you will begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- ✓ Report security incidents as detailed in IHS SOP 05-03, *Incident Handling Guide*.

Users Shall Not:

- X** Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

8.1.1.10 Session Time Outs

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

Users Shall:

- ✓ Utilize a screen saver with password protection set to suspend operations at no greater than 10-minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on your screen after some period of inactivity.

8.1.1.11 Hardware**Users Shall:**

- ✓ Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- ✓ Keep an inventory of all system equipment.
- ✓ Keep records of maintenance/repairs performed on system equipment.

Users Shall Not:

- X** Do not eat or drink near system equipment.

8.1.1.12 Awareness**Users Shall:**

- ✓ Participate in organization-wide security training as required.
- ✓ Read and adhere to security information pertaining to system hardware and software.
- ✓ Take the annual information security awareness.
- ✓ Read all applicable RPMS Manuals for the applications used in their jobs.

8.1.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that:

- a. Are in writing.
- b. Provide authentication of the remote user through the use of ID and password or other acceptable technical means.

- c. Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- d. Ensure adequate storage of files, removal and non-recovery of temporary files created in processing sensitive data, virus protection, intrusion detection, and provides physical security for government equipment and sensitive data.
- e. Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote Users Shall:

- ✓ Remotely access RPMS through a virtual private network (VPN) when ever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote Users Shall Not:

- X Disable any encryption established for network, internet and web browser communications.

8.1.2 RPMS Developers

Developers Shall:

- ✓ Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- ✓ Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- ✓ Only access information or code within the namespaces for which they have been assigned as part of their duties.
- ✓ Remember that all RPMS code is the property of the U.S. Government, not the developer.
- ✓ Shall not access live production systems without obtaining appropriate written access, shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- ✓ Shall observe separation of duties policies and procedures to the fullest extent possible.
- ✓ Shall document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change and reason for the change.
- ✓ Shall use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- ✓ Shall follow industry best standards for systems they are assigned to develop or maintain; abide by all Department and Agency policies and procedures.
- ✓ Shall document and implement security processes whenever available.

Developers Shall Not:

- X Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- X Grant any user or system administrator access to RPMS unless proper documentation is provided.
- X Not release any sensitive agency or patient information.

8.1.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators have added responsibilities to ensure the secure operation of RPMS.

Privileged Users Shall:

- ✓ Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- ✓ Ensure that government personnel and contractor personnel understand and

comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.

- ✓ Advise the system owner on matters concerning information technology security.
- ✓ Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- ✓ Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- ✓ Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need to know basis.
- ✓ Verify that users have received appropriate security training before allowing access to RPMS.
- ✓ Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- ✓ Document and investigate known or suspected security incidents or violations and report them to the ISSO, CISO, and systems owner.
- ✓ Protect the supervisor, superuser or system administrator passwords.
- ✓ Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- ✓ Watch for unscheduled, unusual, and unauthorized programs.
- ✓ Help train system users on the appropriate use and security of the system.
- ✓ Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- ✓ Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- ✓ Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and back up files.
- ✓ Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- ✓ Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- ✓ Shall follow industry best standards for systems they are assigned to; abide by all Department and Agency policies and procedures.

Privileged Users Shall Not:

- X** Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- X** Grant any user or system administrator access to RPMS unless proper documentation is provided.
- X** Not release any sensitive agency or patient information.

9.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT User Support (IHS) by:

Phone: (505) 248-4371 or
(888) 830-7280

Fax: (505) 248-4297

Web: www.ihs.gov/GeneralWeb/HelpCenter/HelpDesk/index.cfm

Email: support@ihs.gov