RESOURCE AND PATIENT MANAGEMENT SYSTEM

Contract Health Services Management Information System

(ACHS)

Addendum to User Manual

Version 3.1 Patch 30
August 2022

Office of Information Technology
Division of Information Resource Management
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1.0 Introduction

Please review these changes and add a copy of them to any printed documentation your site may be using for CHS v3.1. These changes will be integrated into future versions of the software and user manuals. These changes will no longer be considered an addendum at the time of the next version release.

This addendum only provides written guidance on changes made in the patch that are relevant to the user. To see a list of all changes made in a patch, please refer to the patch notes for each of the respective patches.

1.1 Summary of Changes

This patch contains changes to support the Social Security Number Fraud Prevention Act of 2017 and the Social Security Number Reduction Act.

In June 2018, the Administration's Delivering Government Solutions in the 21st Century: Reform Plan and Reorganization Recommendations included a proposal to transition Federal agencies' business processes and recordkeeping to a fully electronic environment and end the National Archives and Records Administration's (NARA) acceptance of paper records by December 31, 2022.

1.1.1 Patch 30

Patch 30 includes the following changes:

- Add Mandated eSignature for Denial Letters
- Add UEI to PO printing functionality
- Replace SSN with DOB/Leave EIN in Document Status by FY with Totals option
- Replace SSN with DOB in Document Status by FY with File option
- 21st Century Cures cross reference for CHS CHEF REGISTRY file
- Remove display of Preferred Name
- Correction to Area CHS UFMS export vendor UEI
2.0 Patch 30 Changes

2.1 Mandated E-Signature for Denial Letters

The main functionality delivered in this patch refers to the 2019 OMB memo for all agencies to transition to electronic record by December 31, 2022. Link to the memo: Memorandum for Heads of Executive Departments and Agencies Number M-19-21 (archives.gov)

The system allows qualified user(s) to electronically sign denials. This functionality includes a setup parameter for the site location as well as for Denial Officials. The Denial Officials will utilize a new menu option to electronically sign denials. The system will also provide the ability to Print/Reprint signed denials.

Notifications/Bulletins will appear on the CHS main screen to inform users of outstanding denials to be signed and/or printed.

2.1.1 E-Signature SETUP Parameters

- **SITE LEVEL setup**: A new parameter must be set at the site level to activate the electronic signature process for denials for a specific location. This new parameter resides in the ESIT Add or Edit Electronic Signature Parameters option [CHS – MGT – PED – ESIT]. At the “DENIAL E-SIG ACTIVATION DATE:” prompt, enter the date that the site will begin signing denials electronically.

![Add or Edit Electronic Signature Parameters](image)

Figure 2-1: Add or Edit Electronic Signature Parameters

- **USER setup**: A new set of parameters must be set to activate the electronic signature process for denials for a specific user (i.e., Denial Official). These new parameters reside in the EOFF Add or Edit Electronic Signature Officials option [CHS – MGT – PED – EOFF].

Select the appropriate LOCATION and USERS NAME. At the “DENIAL OFFICIAL:” prompt, enter **YES**. At the “DENIAL ACTIVATION DATE:” prompt, enter the date that the user can begin signing denials electronically.
Figure 2-2: Denial Activation Date

2.1.2 BULLETINS on CHS Main Screen

Bulletins/notifications appear on the CHS main screen for all users prompting that Denials are ready to be electronically signed and/or printed.

Figure 2-3: Notification for Electronic Denial in CHS Main Screen
2.1.3 ENTER NEW E-SIG Menu option [SIGD]

The new menu option [SIGD Apply Electronic Signature Denial Official] where authorized Denial Officials can electronically sign Denials is found on the Electronic Signature Authorization Menu [CHS – EMNU – SIGD].

![Electronic Signature Authorization Menu](image)

When the user selects the **Apply Electronic Signature Denial Official** option, the system will ensure the user has a valid E-Signature. The following prompt will display for the user to enter the required E-Signature:

![Enter your Current Signature Code](image)

If the user fails to enter a valid electronic signature code (within three [3] attempts), the system will display the following message:

![System Message if User Fails to Enter a Valid Electronic Signature Code](image)

Once the user’s E-Signature is verified, the system will perform validation checks to ensure that **both** the site and the user are properly set up to utilize the electronic signature process for Denials for the location that the user is logged into (aka “Current Location”).
**CHECK 1 – USER:** The system will verify that the user is set up as a DENIAL OFFICIAL for the Current Location. These settings are made using the **EOFF** menu option. See Section 2.1.1.

If the user is *not* a DENIAL OFFICIAL with a valid Activation Date setup, the system will display the following message:

```
You are not authorized in the CHS E-SIG file to sign denial letters.
```

Figure 2-7: You Are Not Authorized in the CHS E-SIG File to Sign Denial Letters

**CHECK 2 – LOCATION:** If the user is a valid DENIAL OFFICIAL, the system will check that the site has a valid DENIAL E-SIG ACTIVATION DATE for the Current Location. See Section 2.1.1.

If the site does *not* contain a valid date, the system will display the following message:

```
The Denial E-Signature Parameter start date has not been set up for your facility.
```

Figure 2-8: Denial E-Signature Parameter Start Date Has Not Been Set Up for Your Facility

Finally, once the user and site parameters are verified, the system will check for Denial letters waiting in the queue for signature. If there are *no* Denials in the queue to be signed, the system will display the following message:

```
There are not any denial letters in the queue to be signed.
```

Figure 2-9: Message Displayed for No Denials in the Queue to be Signed

### 2.1.4 USE NEW E-SIG Functionality Within SIGD

At this point, when all the validations and checks are complete, the system will display all the **Denials Letters to be signed** for the Current Location so that the DENIAL OFFICIAL can sign Denials as needed. In summary, the system will display the Denials for signature (in List Manager) as follows:
Denials to be signed will be listed in Patient Name order and will include:

- Patient Name
- Date of Birth
- Service Date
- Reason for Denial [Primary Denial Reason only]
- Denial Date
- Denial #
- Vendor

**Note:** All denials will require an electronic signature to be removed from the List Manager display.

The system provides the following Action Options to assist the user in electronically signing the Denials.

- **V View Denial:** This option allows the user to select a single denial to view the actual Denial Letter in detail.

The user is allowed to select a **single** Item#:

```
Select Item(s): +// V View Denial Which Denial: (1-7):
```

Figure 2-11: Selecting an Item Prompt

Once selected, the Denial Letter (detail view) is displayed.
• **DS Deselect Denial(s):** This option allows the user to choose a single or multiple line items to *exclude* from being electronically signed.

```
Select Item(s): +// ds  Deselect Denial(s)
Enter the Item number that you DO NOT want your electronic signature applied to: (1-7);
```

Figure 2-12: DS Command, Deselect Denial(s)

Once the user presses ENTER, an asterisk (*) appears in front of the line# for the de-selected Denial(s).

• **S Select Denial(s):** This option allows the user to choose a single or multiple line items to *include* for E-Signature.

```
Select Item(s): +// s  Select Denial(s)
Enter the Item number that you want your electronic signature applied to: (1-7);
```

Figure 2-13: S Command, Select Denials

Once the user presses ENTER, an asterisk (*) appears in front of the line# for the de-selected Denial(s).

• **VL View List:** This option allows the user to view either a list of Selected Denials or a list of Deselected denials. The following is an example of viewing the Deselected denials:

```
Output Browser

Enter ?? for more actions

Select Action: +//
```

Figure 2-14: View List of Deselected Denials
2.1.5 Applying Electronic Signature Upon EXIT [SIGD]

Quit is designed to allow the user to exit the new functionality and apply the required E-Signature to all the selected denials. Quit also allows the user to exit without applying the E-Signature to any denials.

The following information is displayed to the user before asking the user to confirm the application of the E-Signature.

![Figure 2-15: Prompt Asking User to Confirm Before Applying Electronic Signature]

**Note:** The confirmation prompt “Do you want ALL selected documents stamped with your electronic signature?” is displayed without a default response. The user must enter Y or N to continue.

- **YES:** This response indicates that the user wants to apply the E-Signature to all selected denials and exit the option. In the case, the system will display the following message:

  ![Figure 2-16: System Message After All Denials have had the E-Signature Applied]

- **NO:** This response indicates that the user wants to exit the option – without applying the E-Signature to the selected denials. In this case, the system will display the following message:

  ![Figure 2-17: System Message after User Wants to Exit Option Without Applying E-Signature]

2.1.6 DENIAL PRINTING Options

The Print Denial Letters and Fact Sheets [CHS – DEN – DEN – DENL – DEN] option has been modified to check whether the Current Location is set up for the E-Sig process for signing denials.
The system will check that the site has a valid DENIAL E-SIG ACTIVATION DATE for the Current Location. See Section 2.1.1.

- **SITE “NOT” USING E-SIG PROCESS**: If the site does **not** contain a valid date, the menu options will remain **unchanged** in both display and functionality as follows:

  ![Figure 2-18: Menu Options Remain Unchanged if Site Lacks a Valid Date](image)

- **SITE USING E-SIG PROCESS**: If the site contains a valid date, the system will display the existing denial printing options along with the new E-Signature printing options as follows:

  ![Figure 2-19: Menu Options/Display if Site has a Valid Date](image)

  - Menu options 1) and 2) are existing menu options and will remain **unchanged** in functionality. These options will be available to the user to print Denials **before** the site DENIAL E-SIG ACTIVATION DATE. These Denials will require a manual signature.
  
  - When the user selects “3) Print with E-Signature”, the system will print only the Denials that have been electronically signed and **not** already printed.

If there are **no** Denials to be printed, the system will display the following message:
When the user selects 4) “Reprint with E-Signature” option, the user may print Denials with an E-Signature in the following ways:

- Issued Date Range
- Individual

The user can select:

1. Issued Date Range: to reprint a range of Denials by Issue Date
2. Individual: to reprint an individual Denial by Denial Number or Patient

For all printed Denials (Print/Reprint-Issued Date Range/Individual), modifications to the Denial letter printing include:

- The Date at the top of the Denial will be modified (if needed) to match the E-Signature date.
- The E-Signature will appear at the bottom of the Denial Letter as follows:

```
Electronically signed by: John Doe, CEO on 3/18/2022
```

### 2.1.7 Additional Information for CANCELLED/REVERSED Denials

This section pertains to Denials that are within the E-Signature process and must be Cancelled (or Reversed).

- **Scenario 1 - Denial is NOT E-signed then CANCELLED**
  - Cancelled Denial is removed from the “Denials to be Signed” list (SIGD)
  - During the “Reprint with E-Signature – Individual” option, the system displays “Document Cancelled” and “Document has not been Electronically signed then allows user to print Denial with “DOCUMENT CANCELLED” border – without E-Signature

- **Scenario 2 - Denial is E-signed / NOT PRINTED then CANCELLED**
  - Cancelled Denial is removed from the “Print with E-Signature” list
  - During the “Reprint with E-Signature – Individual” option, the system displays “Document Cancelled” then allows user to print Denial with “DOCUMENT CANCELLED” border – WITH E-Signature

- **Scenario 3 - Denial is E-signed / PRINTED then CANCELLED**
− Cancelled Denial is removed from “Reprint with E-Signature – Issued Date Range” list
− During the “Reprint with E-Signature – Individual” option, the system displays “Document Cancelled” then allows user to print Denial with “DOCUMENT CANCELLED” border – WITH E-Signature

NOTE: For all scenarios indicated above, the Alerts (#Denials e-signed/ready for print and #Denials to be signed) are automatically adjusted as needed.

2.2 Add UEI to PO Printing Functionality

The Purchase Order printing functionality was modified to include printing the VENDOR UEI instead of the DUNs.

• The parameter prompt [CHS-MGT-PED-PAR] that is used to display/not display the data was modified as follows:
  • PRINT UEI ON P.O.:
  • Purchase Order printing for all P.O. types (including Hospital, Outpatient and Dental) will now display the Vendor UEI in place of the DUNs – when the parameter is set to YES.  [CHS – PRT – PD/REP]

![Figure 2-22: Purchase Order Printing Displaying UEI](image-url)
2.3 Replace SSN With DOB/Leave EIN - Document Status by FY: Totals

The Document Status by FY with Totals option was modified to replace the patient Social Security Number with the patient Date of Birth. The EIN was unchanged. These changes were made for the DETAILED version of all three (3) Report Types (Open, Closed, Combined). [CHS – MGT – PR – SPEC – DSFT]
2.4 Replace SSN With DOB - Document Status by FY: File Option

The Document Status by FY with File option was modified to replace the patient Social Security Number with the patient Date of Birth. These changes were made for the DETAILED version of all three (3) Report Types (Open, Closed, Combined).

[CHS – MGT – PR – SPEC – DSFY]
## Acronym List

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Term Definition</th>
</tr>
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<tbody>
<tr>
<td>ATL</td>
<td>Accredited Testing Laboratory</td>
</tr>
<tr>
<td>CAH</td>
<td>Critical Access Hospital</td>
</tr>
<tr>
<td>CCHIT</td>
<td>Certified Commission for Health Information Technology</td>
</tr>
<tr>
<td>CMS</td>
<td>Centers for Medicare and Medicaid Services</td>
</tr>
<tr>
<td>CQM</td>
<td>Clinical Quality Measures</td>
</tr>
<tr>
<td>EH</td>
<td>Eligible Hospital</td>
</tr>
<tr>
<td>EHR</td>
<td>Electronic Health Record</td>
</tr>
<tr>
<td>EP</td>
<td>Eligible Professional</td>
</tr>
<tr>
<td>GAO</td>
<td>Government Accounting Office</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>IHS</td>
<td>Indian Health Service</td>
</tr>
<tr>
<td>ONC</td>
<td>Office of the National Coordinator</td>
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<tr>
<td>POV</td>
<td>Purpose of Visits</td>
</tr>
<tr>
<td>PRC</td>
<td>Purchase Referred Care</td>
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<tr>
<td>RPMS</td>
<td>Resource and Patient Management System</td>
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<td>Transition of Care</td>
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Contact Information

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