RESOURCE AND PATIENT MANAGEMENT SYSTEM

Referred Care Information System (RCIS)

(BMC)

Addendum to User Manual

Version 4.0 Patch 15
November 2023

Office of Information Technology
Division of Information Resource Management
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## Acronym List

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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 Referred Care Information System (RCIS) Version 4.0. 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 HHS Social Security Number (SSN) Reduction and Elimination

The HHS Information Systems Security and Privacy Policy (IS2P), published in July 2014, which establishes the Department’s policy for the collection and use of SSNs. A memorandum includes the criteria for determining when collections and uses of the SSNs at HHS is authorized, process for reviewing and approving these collections and uses of SSNs, processes for establishing SSN inventories, and steps to take to reduce and eliminate unnecessary use of SSNs.

1.2 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.

Patch 15 includes the following changes for both the RPMS RCIS application and the Referred-RCIS tabs located in the EHR Application.

**RPMS RCIS application include:**

- Cell Phone Number added to Referral Letter
- Automated Fiscal/Calendar yearly setup
- Fix Secondary Referral Letter to print site specific text
- Rename Business Office/CHS Comments to Referral Notes
- General Retrieval Report – Includes Purchase Order type codes
- New parameter to close Inpatient Referral with CHS Denial
- Remove Social Security Number from Reports
- Banner displays Patient Preferred Name*
- Include Referral updates as a CCDA trigger
- Fix approved referrals pending TOC report

**RCIS tabs in EHR include:**

- Changes included in both Referral/Template Referral forms and Non-patient centric RCIS tab:
  - Call in Referral from RPMS displays in the EHR Referral screen
  - Referring Provider and Authorized Visits fields are editable for all Referrals.
  - ALL option removed for selection for Clinical Consultation and from ADD/Edit Referral screen for Referring Provider
  - Referral number Column widened to see the Secondary number extensions.

- Additional Changes to Referral tab and Template Referral forms
  - Banner displays Patient Preferred Name *
  - Status column changed to Referral Status with “All” option in filter
  - Overall form - fields moved to allow for limited space
  - Purpose/Services Requested renamed from Purpose of referral
  - ICD Dx/IPL field (Diagnosis from Integrated Problem list or SNOMED CT look-up)
  - Vendor/Provider fields read-only instead of text boxes
  - Individual Tabs were created for:
    - Medical Hx/Findings
    - Referral Notes (renamed)
    - Case Notes (new notes field)
    - ICD Dx (edit/delete options)
  - Control characters restricted in text fields
  - Remove “Call In By:” label when appropriate

- Additional Changes to Non-patient centric RCIS tab:
  - Include “All” option for both Referral Status and Provider column
  - Display Patient Preferred Name*
  - Include HRN and DOB
  - Fixed incorrect eligibility status display

* This application uses the “AUPN DISPLAY PPN” parameter functionality and is defaulted to OFF until Patient Preferred Name (PPN) is available across the enterprise.
Note: While this parameter is turned off, the Patient Preferred Name will not display in this application. This allows the Patient Preferred Name display to be turned on at once without requiring a coordinated release of all applications. Once all applications support the display of the PPN, instructions will be sent out on how to enable this parameter system-wide.
2.0 Patch 15 Changes – RPMS RCIS

2.1 Cell Phone Number added to Referral Letters

Patient letters printed via RCIS [RCIS – DE – LTRS] have been modified to include the Cell phone number for ALL Letter Types.

**Note:** Currently the cell number can only be populated in the Practice Management Application Suite GUI – Registration module.

```
Referral for Contract Professional Services MAY 05, 2023
********************************************************************************
Patient Identification, Address, Phone
Patient Name: DEMO,PATIENT                       ID Number: TST 500001
               Sex: FEMALE
Address: 1234 Main Street                         DOB: 01/01/2020
               YOURTOWN, OKLAHOMA 76777          Hm Phone: 515-411-8744
               Cell Phone: 515-658-9090

Referred to: DEMO,CRAWLEY                      Referral: 2321012300057
               (TEST,DR)
Mailing: 1234 WEST ELM DRIVE                   Appointment Date:
               ALBUQUERQUE, NM 87190

OUTPATIENT Services                          Expected Ending Date:
# of Outpatient Visits: 1                     
Priority Rating: 1

Purpose/Services Requested: MRI
Patient was treated in 2019.
Patient needs medication for pain.

Additional Medical Information Attached: NO
```

Figure 2-1: Referral Letter with cell phone number

2.2 Automated Fiscal/Calendar yearly setup

The new Automation assists sites with the yearly Fiscal/Calendar setup of the RCIS application. The automated setup uses the Beginning FISCAL YEAR Month field in the PCC Master Control file. If this field is not setup, the month of October will be the default. When the automated setup is completed, the referral number will reset to zero.

**Note:** The user can no longer edit the FY in RCIS Site Parameter option.
2.3 Secondary Referral Letter prints site specific text

Modifications were made so that the secondary referral letter will include site specific text within the letter (when applicable).

Site specific text can be entered using the Edit Site Parameters option. The user can enter CHS APPROVED TEXT, CHS DENIED TEXT, CHS PENDING OR UNKNOWN TEXT and OTHER REFERRAL TEXT. Once entered, the text will be included in the secondary referral letter (when applicable).

![Figure 2-2: Site specific text within the Edit Site Parameters option](image-url)

Referral for Contract Professional Services
MAY 09, 2023

Patient Identification, Address, Phone
Patient Name: DEMO, PATIENT
ID Number: TST 500001
Sex: FEMALE
Address: 1234 Main Street
DOB: 01/01/2020
YOURTOWN, OKLAHOMA 76777
Hm Phone: 515-411-8744
Cell Phone: 515-658-9090

Referred to: ABC ANESTHESIOLOGISTS (800-123-1234)
Specific Provider: DEMO, PROVIDER
Mailing: 111 MAIN STREET
Physical: 111 MAIN STREET
CITYTOWN, AZ 11111-2222
CITYTOWN, AZ 11111-2222
Referral: 2321012300057 A1
OUTPATIENT Services
Appointment Date: 5/9/23 10:00 am
# of Outpatient Visits: 0
Expected Ending Date: MAY 16, 2023
Priority Rating: 1

Purpose/Services Requested: Head/neck pain
Patient was treated in 2019.
Medical findings include prior head injury.

Additional Medical Information Attached: NO

If you have any questions concerning this referral, please contact:
2021 DEMO HOSPITAL (INST) (contact: REFERRAL CONTACT)
5300 HOMESTEAD RD
ALBUQUERQUE, NEW MEXICO 87777 (phone: (555)555-5555)
Referring Provider (ELECTRONIC SIGNATURE):
Case Manager: CLERK, REGISTRATION Veteran:

Our records, as of 5/16/2023 indicate that this patient has the following third party coverage:

PATIENT HAS MEDICARE: - 845578459A
ELIG DATES: 5/12/2023 TO OPEN COVERAGE: A
PATIENT HAS MEDICAID-PLAN NAME: UNKNOWN - 99991111
ELIG DATES: 1/1/2020 TO OPEN COVERAGE: 02
PRIVATE INSURER(S): BC/BS OF KC - BI5039444

PENDING...THIS IS A MEDICAL REFERRAL ONLY AND NOT A GUARANTEE OF PAYMENT. CHS FUNDS ARE NOT AUTHORIZED BECAUSE THERE IS NOT ADEQUATE INFORMATION TO MAKE AN ELIGIBILITY DETERMINATION AT THIS TIME. FOR A DETERMINATION, PLEASE CONTACT THE PARKER SERVICE UNIT/CHS DEPARTMENT DURING REGULAR BUSINESS HOURS: MONDAY THROUGH FRIDAY FROM 8:00 AM TO 5:00 PM.

Figure 2-3: Sample secondary referral letter for PENDING referral

2.4 Rename Business Office/CHS Comments to Referral Notes

Modifications were made to various menu options, screen displays and reports to rename references to Business Office and Business Office/CHS Comments to Referral Notes. These changes are applicable to Add and Edit Referral for both primary and secondary referrals.

- Menu changes:
  - [RCIS – DE – EDIT – RFN]
  - [RCIS – SPEC – RFN]
Figure 2-4: Menu text change with new mnemonic

- Changes made when processing Referrals:
  - [RCIS – DE – ADD/RFY/DSP]
  - [RCIS – DE – EDIT – MOD/MR/MCR (option 9)]
  - [RCIS – DE – SEC – ASEC/ESEC]

You may add a new Referral Notes

1) May 18, 2023 DEMO,CLERK
   Patient was referred from the ABC Clinic in New Mexico

Select one of the following:

A      ADD a new Referral Notes
Q      QUIT

Do you wish to: A/

Figure 2-5: Add Referral Notes

Select one of the following:

0      QUIT
1      MINI MOD
2      ALL DATA
3      DATE/COUNTS
4      COSTS
5      ICD DX
6      CPT PROCEDURES
7      CASE REVIEW
8      PURPOSE/MED HX/OTHER DX INFO
9      REFERRAL NOTES
10     DISCHARGE NOTES
11     ADD DOCUMENTATION
12     CHS ELIG FACTORS
13     OTHER REFERRALS
14     SEND GROUP MESSAGE
15     SEND MESSAGE TO PROVIDERS
16     SEND ALERT TO PROVIDERS
17     APPROVE REFERRAL

EDIT Which Data Type: 0/

Figure 2-6: Edit Referral Notes
==Referral Notes==

DATE: OCT 20, 2023
REVIEWER: DEMO, USER
Patient was referred from the ABC Clinic in New Mexico.

---

Enter ?? for more actions >>>
+ Next Screen - Previous Screen Q Quit
Select Action:+//

---

Figure 2-7: Referral Notes display

- Reports changes:
  - [RCIS – RPT – ADM – RRR/SRR]
  - [RCIS – RPT – CM – OLOG/TLOG]

---

Figure 2-8: Referral Notes – Report Display

2.5 General Retrieval Report – Purchase Order type codes
The RCIS General Retrieval option [RCIS – RPT – GEN] will allow the user to select the following codes to match the type of purchase orders issued. This selection will be available for the Search, Print and Report options for Referral Types: Primary, Secondary or BOTH. The user may select one, two or all three options:

**Note:** In the example below the search option is #45, this number will change for Print and Report options.

45) CHS PO Type Selection.
Enter CHS PO Type:?
ENTER 1 FOR HOSPITAL SERVICE, 2 FOR DENTAL SERVICE, OR 3 FOR OUTPATIENT SERVICE
Choose from:
1 43 (HOSPITAL SERVICE)
2 57 (DENTAL SERVICE)
3 64 (OUTPATIENT SERVICE)
ENTER CHS PO Type:

Figure 2-9: Purchase Order type codes available within General Retrieval report

2.6 New site parameter option to close Inpatient Referral

A new parameter was added to allow the user to select to close inpatient referrals. If set to YES, the CHS Denial and Final Purchase Order will automatically close the inpatient referral.

Note: For the inpatient referral to close properly, a required modification (included in ACHS v3.1 p31) must also be installed. ACHS v3.1 p31 is scheduled to release at the end of September 2023.

The option where the new parameter is set and displayed include:

- Edit Site Parameters [RCIS – MGT – ESP]

Figure 2-10: Edit Site Parameter

- Display Site Parameters [RCIS – MGT – DISP – DSP]

RCIS Site Parameter Display
+  
   AHCCCS NAME:  
   AHCCCS ADDRESS:  
   AHCCCS TELEPHONE NUMBER:  
   AHCCCS PROVIDER NO:  
   HLTH SUM DISPLAY MCC ACTION:  

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Patch 15 Changes – RPMS RCIS
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2.7 Remove Social Security Number from Reports

The patient’s Social Security Number (SSN) was removed from the following Reports:

- RCIS General Retrieval Report [RCIS – RPT – GEN]. SSN was also removed as a field that could be selected for inclusion in the report.
- Referrals at an Outside Facility (Call In’s) [RCIS – RPT – ADM – OUT]
- Print Case Review Comments (By Date/Facility [RCIS – RPT – CM – CRD]

2.8 RCIS application banner displays Patient Preferred Name

The Patient Preferred Name (PPN) will display in the RCIS application if a preferred name has been entered in Patient Registration. The application can also perform a lookup by preferred name. The preferred name will not display in reports or letters. The display shows as Demo, Patient – Preferred Name*.

The PPN is visible throughout the entire RCIS application when the user enters patient name to search for a Referral.
2.9 Report fixed to Remove Referrals when user prints or transmits a TOC

The Approved Referrals Pending TOC Report [RCIS – RPT – ADM – TOCR] has been fixed to remove approved referrals from the report where the TOC has been printed or transmitted.
3.0 Patch 15 Changes – Referred RCIS tabs (EHR)

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

Within EHR, there are two views of patient referral data:

- Patient centric view (to view referrals for a single patient):
  - Select a patient in the Patient Chart
  - Create/Select a Visit
  - Click the Consults/Referrals tab

- Non-Patient centric view (to view referrals for all patients):
  - Click the RCIS tab

**Note:** Regardless of how the user chooses to access the referral data, the display will be the same for Add/Edit Referral for both primary and secondary referrals. The display is also the same when using a Referral Template.

3.1 Changes included in both Referral/Template Referral forms and Non-patient centric RCIS tab:

3.1.1 Call in Referral from RPMS display in the EHR Referral screen.

- Referral Screen in EHR RCIS was modified and now displays “Call In By:” information from RPMS.
For Call In Referrals entered in RPMS then edited in EHR, the following fields are not required and the referral can be saved:

- Referring Provider field
- ICD Dx/IPL

3.1.2 Referring Provider and Authorized Visits fields are editable for Referrals

The Referring Provider and Authorized Visits fields have been updated so they are now editable for Referrals.
3.1.3 **ALL option removed for selection for Clinical Consultation and from ADD/Edit Referral screen for Referring Provider**

Users are no longer able to select All from the Clinical Consultation dialog box and from the ADD/EDIT Referral Screen.

![Figure 3-2: EHR Clinical Consultation Form](image)

Figure 3-2: EHR Clinical Consultation Form
3.1.4 Referral number Column widened to see the Secondary number extensions.

Users can now view the secondary number extensions (i.e. A1 or A2) in the Referral Number column.
3.2 Changes to Referral and Referral Template forms

Modifications made to the referral form apply to the Add/Edit Referral for both primary and secondary referrals. All changes also apply when using a Referral Template (except display of Patient Preferred name). The changes are explained in the sections below:

3.2.1 Display Patient Preferred Name

The Patient Preferred Name (PPN) will display in the banner of the referral if a preferred name has been entered in Patient Registration. The preferred name will not display in reports or letters. The display shows as **Demo, Patient – Preferred Name**.
3.2.2 Status column changed to Referral Status with “All” option in filter

Text was changed to now show Referral Status.
3.2.3 Purpose/Services Requested Field

The **Purpose/Services Requested** field has been repositioned on the form. This is a free text field and it is required. This field name was previously labeled Purpose of Referral. Click the Purpose/Services Requested text box and enter a referral purpose.

- Problem List selection: Click the ICD Dx/IPL dropdown and select from the problem list displayed. If a problem list item is not available, it can be entered through the IPL tab in EHR.
- SNOMED CT lookup: Click the ICD Dx/IPL dropdown and select `<SNOMED Lookup>`. The SNOMED CT Lookup window will display that allows the user to search for and select the appropriate diagnosis code.

3.2.4 ICD Dx/IPL Field

A new **ICD Dx/IPL** field allows a selection from the Patient’s Problem List or a SNOMED code search to select a diagnosis. The diagnosis will be stored and used as the provisional diagnosis. When the SNOMED option is used, an entry will also be stored in the V Referral file. And for both the SNOMED and IPL options, the diagnosis will be stored in the RCIS Diagnosis file. This field is required.
**Note:** In the screenshot below, the Diagnosis from the Problem list are always above <SNOMED Lookup>. Anything below the <SNOMED Lookup> is what has been selected for the Referral.

**Figure 3-8: ICD Dx/IPL dropdown on EHR referral form**

**Note:** If the user is editing an existing referral that does not have an entry for the ICD Dx/IPL field, the system will default to <Select> in the dropdown to indicate that the user must either select from the Problem List displayed or perform a SNOMED Lookup.
3.2.5 Primary Vendor and Specific Provider fields

For Primary Vendor and Specific Vendor section, the search button displays to the left of the read-only text box. The user must click the search button to open a search window and enter the name of the vendor then make a selection from the list. This format change has been made for all Referral Types.

![Figure 3-9: SNOMED CT Lookup screen for selecting the appropriate ICD Dx/IPL](image)

![Figure 3-10: Primary Vendor and Specific Provider search buttons on EHR referral form](image)
3.2.6 New Individual Tabs to allow for limited space on overall Referral form

A new **Case Notes** free text field has been added. **Referral Notes** has been renamed from Business Office notes. To accommodate for the limited space on the referral form, Individual Tabs were created for the following:

- **Medical Hx/Findings** – For a new Referral, select the tab and click in the blank space to enter free text notes. In editing a referral, Click **Append** to add notes.

![Figure 3-11: Medical History and Findings display](image)

![Figure 3-12: Append notes to Medical history and Findings tab](image)

Click OK to save the notes or Cancel to exit without saving.

- **Referral Notes** – For a new Referral, select the tab and click in the blank space to enter free text notes. In editing a referral, Click **Append** to add notes.
Figure 3-13: Referral notes display

Figure 3-14: Append notes to Referral notes tab

Click OK to save the notes or Cancel to exit without saving.

- **Case Notes** – For a new Referral, select the tab and click in the blank space to enter free text notes. In editing a referral, Click *Append* to add notes.
Click OK to save the notes or Cancel to exit without saving.

- **ICD Dx** – Entry from the ICD Dx/IPL will display in this section after the new referral has been saved.
To Edit an existing Dx, select the diagnosis to edit and click **Edit**. A window will display with radio buttons for Type and Primary/Secondary. There is also a Diagnosis Narrative field. User can switch the type of diagnosis between Provisional and Final. The user can switch between Primary and Secondary and the Diagnosis Narrative text can be modified. Select OK to save the changes.

To Delete an existing diagnosis, select the diagnosis for deletion. Note there is no confirmation to delete, once the user selects delete it is instant. Of course, the diagnosis can be added again if needed.
3.2.7 Control characters restricted in text fields:
When adding/editing any type of Referral, these control characters (~ Tilde, ^ Caret, ` Grave Accent) are restricted from being used in the Purpose of Referral, Notes to Appointment Scheduler, Medical Hx/Findings, Referral Notes, Case Notes and Diagnosis Narrative fields. These characters are restricted because they can result in referrals not being able to be opened.

3.2.8 Remove “Call In By:” label when appropriate
When adding a Secondary Referral in EHR from a CALL IN from RPMS the “CALL IN BY:” label was removed from the Secondary Referral form.
Figure 3-20: Add/Edit Secondary Referral without Call In By

### 3.3 Changes to Non-Patient centric RCIS tab

#### 3.3.1 EHR RCIS Referral tab display

The following modifications were made to the RCIS tab display:

- The Referral Status dropdown includes an option for “All”. Referral Status was renamed from Status.
- The Provider dropdown includes an option for “All”. If user selects “All Providers”, the referral list display is limited to the first 100 entries.
- Show All checkbox has been renamed to Show All Users
- **Patient Preferred Name** has been added as part of the patient’s name in the table view. The display shows as **Demo, Patient – Preferred Name**
- **HRN** has been added as part of the patient’s name in the table view
- **Date of Birth** has been added as a new column in the table view
3.3.2 Correct Patient Eligibility Status is displayed

Modifications were made to “refresh” the patient eligibility status in the RCIS tab view for the referral selected. When the user accesses the RCIS tab, the Edit Referral now displays the correct patient eligibility status for the referral selected from the list.
### Acronym List

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Term Definition</th>
</tr>
</thead>
<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>
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<td>ONC</td>
<td>Office of the National Coordinator</td>
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<td>POV</td>
<td>Purpose of Visits</td>
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<tr>
<td>PRC</td>
<td>Purchase Referred Care</td>
</tr>
<tr>
<td>RPMS</td>
<td>Resource and Patient Management System</td>
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<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TOC</td>
<td>Transition of Care</td>
</tr>
</tbody>
</table>
Contact Information

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

**Phone:** (888) 830-7280 (toll free)

**Web:** [https://www.ihs.gov/itsupport/](https://www.ihs.gov/itsupport/)

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