



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **Release of Information Disclosure System**

(BRN)

**User Manual**

Version 2.0 Patch 5  
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## 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.

## 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 number 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 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, number 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 number 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.

**Note:** At the time of installation of the new version 2.0 package, all data converts from the old version 1.0 files and globals (AZXA namespace) to the new BRN name spacing conventions.

## 2.0 ROI Main Menu

The ROI main menu allows you to access three sub menus, ROI edit menu, ROI reports menu, and ROI management menu. 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 P5, Jul 31, 2023        *  
*****  
                2013 DEMO TRIBE  
                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 P5, Jul 31, 2023        *
*****
                2013 DEMO TRIBE
                RELEASE OF INFORMATION SYSTEM

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

```

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 P5, Jul 31, 2023        *
*****
                2013 DEMO TRIBE
                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

```

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. At the “Request Method” prompt select a request method. You can select from:

- 1 In Person
- 2 Telephone Call
- 3 Regular Mail
- 4 Electronic Mail
- 5 Fax

10. Type the name of the requesting party at the “Requesting Party:” prompt. The requesting party must already be on the list.

11. Type a purpose at the “Purpose:” prompt. You can select from:

- Further Medical Care
- Insurance
- Attorney
- Personal
- School
- Tort
- FOIA
- Subpoena
- Other
- A Disability
- B Healthcare Operations
- C Payment
- D Treatment

```
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)

12. Type the request priority at the “Request Priority:” prompt. Choose either STAT or Non-Critical.

13. At the “Patient/Agent Request Type prompt choose one of the following:

- H Hand Deliver
  - I In Person
  - MR Mail Regular
  - MC Mail Certified
  - F Fax
  - Other
  - E Electronic
14. 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.
15. Type YES or NO at the “Entire Record:” prompt. Type **YES** only if the entire record is sent.
16. 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. 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)

17. Enter any other additional useful information at the “Disclosure Description:” prompt. This field is not required. This is a word processing field for which you must answer YES to enter the Screen Editor function.
18. 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.
19. 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.

20. 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
  - Other
  - E Electronic
21. At the “Number of Pages” prompt, type the number of pages included in the disclosure.
22. At the “Cost per Page” prompt, type the cost for each page.
23. 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:
NUMBER OF PAGES: 12345??
Type a Number between 0 and 10000, 0 Decimal Digits
NUMBER OF PAGES: 2345
COST PER PAGE: .05
```

Figure 3-6: Adding a new disclosure (steps 16-23)

## 3.2 Add Multiple Patients Under One Request (AMP)

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 Editing 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.

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.

2. 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: DOE,JANE// (No Editing)
  TYPE: MEDICAL// [RET]
  OTHER TYPE DESCRIPTION: [RET]
  REQUESTING PARTY: FALLON SCHOOL DISTRICT// [RET]
  PURPOSE: FOIA// SCHOOL
  REQUEST PRIORITY: NON-CRITICAL// STAT
  PATIENT/AGENT REQUEST TYPE: MAIL REGULAR// [RET]
  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 DESCRIPTION:
    No existing text
    Edit? NO//[RET]
  Is this a First Party Request?: NO// [RET]
  Select RECEIVING PARTY: FALLON SCHOOL DISTRICT//[RET]

```

```

RECEIVING PARTY: FALLON SCHOOL DISTRICT//[RET]
DISCLOSURE DATE: APR 13,2000//[RET]
RECORD DISSEMINATION: MAIL REGULAR//[RET]
NUMBER OF PAGES: 50//[RET]
COST PER PAGE: .10//[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
  - 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 information

### 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 labels are loaded)
```

Figure 3-10: Printing mailing label

### 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
*****
Release of Information Disclosure System (BRN) v2.0 Patch 1
User Manual 13 ROI Edit Menu (DE)
May 2008
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
DOE,JOHN 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 date

### 3.8 Patient Detailed Disclosure Log (Cumulative) (DDL)

This report will print a cumulative list of one individual patient's disclosure requests. 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.

To print a Patient Detailed Disclosure log, type **DDL** at the prompt in the ROI Disclosure Edit Menu.

1. Type the patient's name at the "Enter a Patient Name:" prompt.
2. Type the name of a print device at the "Device:" prompt.

```

Enter a Patient Name: DEMO,ALLISON          F 12-25-1968 XXX-XX-1789   TST
124255

DEVICE:   Virtual

          **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
ROI CUMMULATIVE PATIENT RECORD              JUL 24,2023          PAGE    1
DEMO,ALLISON -HR#: 124255          RECORD INFORMATION          REC PTY   DT DISC
-----
11/04/21   290626636   FU  ENTIRE RECORD SENT          SELF          11/04/21
05/25/23   290626647   TR  ENTIRE RECORD SENT          SELF          05/25/23
05/24/23   290726648   IN  Send back injury infor     SELF          05/25/23
06/16/23   29061111116   FU  INJURY INFO                  REQUESTOR 100  06/16/23
06/13/23   29061111120   HE  ENTIRE RECORD SENT          MOTHER          06/28/23
07/24/23   29061111125   IN  Lab results only            REQUESTOR 2451  07/24/23
07/24/23   29061111126   FU  THIS IS A TEST              REQUESTOR 2451  07/24/23

```

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:
DEMO,ALLISON                F 12-25-1968 XXX-XX-1789   TST 124255
Do You Wish to print SUSPENDED Disclosures? NO// YES

DEVICE: HOME// HOME;;999   Virtual

      CUMMULATIVE DISCLOSURE RECORDS FOR: DEMO,ALLISON
HEALTH RECORD #:   TST 124255
DISPLAY DATE: Jul 24, 2023

Number   DISC #      DT REC'D      REQUESTING PARTY      TYPE      STATUS
-----
1)       290626636  11/4/21       SELF                  M         C
2)       290626647  5/25/23       SELF                  M         C
3)       290726648  5/24/23       SELF                  M         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 date at the “Suspend Stop DT:” prompt.

```
Select ROI DISCLOSURE DATE REQUEST INITIATED: 290621  
SUSPEND START DT:: T (JAN 13, 2003)  
SUSPEND STOP DT: T+30 (FEB 12, 2003)
```

Figure 3-18: 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 P5, Jul 31, 2023        *
*****
                2013 DEMO TRIBE
                RELEASE OF INFORMATION SYSTEM

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

```

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 P5, Jul 31, 2023        *
*****
                2013 DEMO TRIBE
                ROI REPORTS MENU

2ND   Print All Disclosures W/2nd and/or 3rd Requests
ACT   Patient Accounting of Disclosures
AGE   Print AGING REPORTS
CNT   Count Closed Disclosures By Purpose/Date Range
DDL   PATIENT Detail Disclosure Log (Cummulative)
DIS   Print CLOSED Disclosure Records
IQ    Inquire to a Specific ROI Disclosure Record
MET   Count Records by Request Method
ML    Print Master Log (By Date Range)
OP    Print OPEN Disclosures Only
PAGE  Print Reproduction Page Costs (By Date Range)
RDIS  Count Records Disseminated by Date
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

```

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's 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          JUL 27,2023  13:03    PAGE 1
1ST DISCLOSURE
REQUEST  NUMBER          STATUS  REQUESTING PARTY  REQUEST METHOD  2ND / 3RD
-----
FACILITY: TEST HOSPITAL
01/07/08  290610416    OPEN   REQUESTOR 3668
                                                01/22/08
01/14/22  290626638    CLOSED MOTHER
                                                IN PERSON
                                                IN PERSON
                                                01/12/22
07/24/23  29061111125  CLOSED REQUESTOR 2451
                                                REGULAR MAIL
                                                REGULAR MAIL
                                                07/24/23
                                                REGULAR MAIL
                                                07/24/23

```

Figure 4-3: Printing all disclosures



## 4.2 Print Patient Accounting of Disclosures (ACT)

1. To print the Patient Accounting of Disclosures report, type **ACT** at the ROI Reports Menu.
2. Enter a Patient Name.
3. Enter beginning ROI Initiated Date.
4. Enter ending ROI Initiation Date
5. 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.
6. Type the name of a print device at the "Device:" prompt

```

Enter a Patient Name:      DEMO,ALLISON      F 12-25-1968 XXX-XX-1789

Enter beginning ROI Initiated Date:  t-30  (JUN 27, 2023)

Enter ending ROI Initiation Date:  (6/27/2023 - 7/27/2023): t  (JUL 27,
2023)
Print for ALL Facilities? YES// ?

Enter either 'Y' or 'N'.

Print for ALL Facilities? YES// n NO
Select Facility:      DEMO HOSPITAL

                                ROI PATIENT ACCOUNTING RECORD
                                REPORT REQUESTED BY: ADAM,ADAM
                                FOR PATIENT: DEMO,ALLISON
                                TODAY'S DATE: Jul 27, 2023

DEVICE:  Virtual
        **CONFIDENTIAL PATIENT INFORMATION**
ROI PATIENT ACCOUNTING RECORD          JUL 27,2023          PAGE 1
DEMO,ALLISON HR#:
DATE      TYPE      DESC      REC'D BY  DATE SENT  DELIVERY
-----
        FACILITY: 2013 DEMO HOSPITAL
07/24/23  INSURANCE          REQUESTO  JUL 24,2023
07/24/23  FURTHER MEDI THIS IS A  REQUESTO  JUL 24,2023  MAIL REGULAR
          TEST
Enter RETURN to continue or '^' to exit:

```

Figure 4-4: Printing patient accounting of disclosures

## 4.3 Print Aging Reports (AGE)

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

```

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

```

Figure 4-5: Menu options for printing aging reports

### 4.3.1 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? NO//
** If you are a multi-division site, you will be asked the following:
Print for ALL Facilities? YES// NO
Select Facility: ?
  Answer with ROI LISTING PARAMETER FACILITY NAME
  Choose from:
  2013 DEMO HOSPITAL
  2013 DEMO CLINIC
  2013 DEMO-3 TRIBAL CLINIC

Select Facility:  2013 DEMO HOSPITAL      HEADQUARTERS WEST      ALBUQUERQUE
01
DEVICE: HOME  Virtual
  AGING REPORT - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
                        JUL 27,2023  13:56      PAGE 1
DISC #      ST  DT REC'D  RECEIVING    AGE  DISC DT  P  PURPOSE      STAFF
-----
FACILITY: 2013 DEMO HOSPITAL
29061      C   10/02/01  REQUESTOR 2  0    10/02/01
                                REQUESTOR 3  796                N  PERSONAL

```

29062	C	10/03/01	REQUESTOR	4	0	10/03/01	N	FURTHER	MED
29063	C	10/04/01	REQUESTOR	6	0	10/04/01	N	FURTHER	MED
29064	C	10/04/01	REQUESTOR	8	0	10/04/01	N	PERSONAL	
29065	C	10/04/01	REQUESTOR	9	0	10/04/01	N	PERSONAL	
29066	C	10/04/01	MOTHER		0	10/04/01	N	PERSONAL	

Figure 4-6: Printing aging report by status

### 4.3.2 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: ?
Release of Information Disclosure System (BRN) v2.0 Patch 1
User Manual 22 ROI Reports Menu (RPT)
May 2008
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**
                                AUG 2,2023 13:43    PAGE 1
DISC #      ST  DT REC'D  RECEIVING  AGE  DISC DT  P  PURPOSE  STAFF

```

```

-----
FACILITY: 2013 DEMO HOSPITAL
29067793 C 10/04/06 REQUESTOR 2 120 02/01/07 N FURTHER MED
29069691 C 06/27/07 REQUESTOR 3 120 10/25/07 N FURTHER MED

```

Figure 4-7: Printing an aging report by a selected aging range

### 4.3.3 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**
AUG 2,2023 13:49 PAGE 1
DISC # ST DT REC'D RECEIVING AGE DISC DT P PURPOSE STAFF
-----
290626628 C 04/05/17 SELF 0 04/05/17 N PAYMENT BRONSON,GI

```

290626629	C	04/05/17	SELF	0	04/05/17	N	TREATMENT	BRONSON, GI
-----------	---	----------	------	---	----------	---	-----------	-------------

Figure 4-8: Printing aging report by staff assignment

### 4.3.4 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**
                                AUG 2,2023 13:52          PAGE 1
DISC #      ST  DT REC'D  RECEIVING    AGE  DISC DT  P  PURPOSE      STAFF
-----
          FACILITY: 2013 DEMO HOSPITAL
290612520   C   09/08/08  REQUESTOR 3  24   10/02/08  N  DISABILITY
290612633   C   10/21/08  REQUESTOR 3   0   10/21/08  N  DISABILITY
290612657   C   10/28/08  REQUESTOR 3   6   11/03/08  N  DISABILITY

```

Figure 4-9: Printing an aging report by purpose

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

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

1. To print a count of closed disclosures, type **CNT** at the ROI Reports Menu.
2. Type the beginning date of the date range at the “Enter beginning ROI initiated Date:” prompt.
3. Type the ending date of the date range at the “Enter ending ROI Initiation Date:” prompt.
4. 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
-----
  PURPOSE: FURTHER MEDICAL CARE
  SUBCOUNT 5
Release of Information Disclosure System (BRN) v2.0 Patch 1
User Manual 25 ROI Reports Menu (RPT)
May 2008
  PURPOSE: ATTORNEY
  SUBCOUNT 4
  PURPOSE: PERSONAL
  SUBCOUNT 1
  PURPOSE: SCHOOL
  SUBCOUNT 5
  PURPOSE: TORT
  SUBCOUNT 1
  PURPOSE: FOIA
  SUBCOUNT 3
  PURPOSE: SUBPOENA
  SUBCOUNT 3
  PURPOSE: OTHER
  SUBCOUNT 1
COUNT 23

```

Figure 4-10: Printing a count of closed disclosures

## 4.5 Patient Detail Disclosure Log (Cumulative) (DDL)

Use this report to print a cumulative list of one individual patient's disclosure requests. This report is useful for placing in the individual patient chart and serves as a total historical listing of all requests for information for this particular patient. Once a new request is received, this report should be generated again for this particular patient for documenting all disclosure requests. This report can also be printed under the 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          AUG 2,2023          PAGE 1
DEMO,ALLISON -HR#: 124255          RECORD INFORMATION          REC PTY  DT DISC
-----
11/04/21  290626636  FU  ENTIRE RECORD SENT          SELF          11/04/21
05/25/23  290626647  TR  ENTIRE RECORD SENT          SELF          05/25/23
05/24/23  290726648  IN  Send back injury infor        SELF          05/25/23
06/16/23  29061111116  FU  INJURY INFO                    REQUESTOR 100
  
```

Figure 4-11: Printing a detailed patient disclosure log

## 4.6 Print Closed Disclosure Records (DIS)

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

1. To print a closed disclosure record, type **DIS** at the ROI Reports menu.
2. Type the beginning date at the "Enter Beginning ROI Initiated Date:" prompt.
3. Type the ending date at the "Enter Ending ROI Initiated Date:" prompt.
4. 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**
                        AUG 2,2023 13:59      PAGE 1
DISCLOSURE  REQUESTING  USER      USER      RECEIVING
NUMBER      PARTY          INITIATED  COMPLETED  PARTY          DISC DT
-----
FACILITY: 2013 DEMO HOSPITAL
290611     REQUESTOR 245  ADAM,ADAM  ADAM,ADAM  REQUESTOR 245  07/24/23  C
290611     REQUESTOR 245  ADAM,ADAM  ADAM,ADAM  REQUESTOR 245  07/24/23  C
290611     REQUESTOR 100  ADAM,ADAM  ADAM,ADAM  REQUESTOR 245  04/13/00  C
290611     MOTHER    PINTO-YAZZ  PINTO-YAZZ  MOTHER      07/25/23  C
290611     MOTHER    PINTO-YAZZ  PINTO-YAZZ  MOTHER      07/25/23  C

```

Figure 4-12: Printing a closed disclosure record

## 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                AUG 2,2023      PAGE 1
-----
DISCLOSURE #29061111125Initiated On JUL 24,2023 by REGULAR MAIL
REQUEST STATUS: CLOSED                      PRIORITY: NON-CRITICAL
PAT/AGT REQ TYPE: MAIL REGULAR
PATIENT: DEMO,ALLISON (#124255)
FACILITY: 2013 DEMO HOSPITAL
REQUESTING PARTY: REQUESTOR 2451
PURPOSE: INSURANCE
TYPE: OTHER
      Lab results only
      THIS IS A TEST
INITIATED BY: ADAM,ADAM                     ASSIGNED TO:
COMPLETED BY: ADAM,ADAM                    CLOSED: JUL 24,2023
DISCLOSURE DESCRIPTION:
SUSPEND START: JUL 24,2023                  **SUSPENDED**
SUSPEND STOP: AUG 23,2023
2ND REQUEST: JUL 24,2023                    2ND REQUEST METHOD: REGULAR MAIL
3RD REQUEST: JUL 24,2023                    3RD REQUEST METHOD: REGULAR MAIL

```



RECEIVING PARTY: REQUESTOR 2451 DISSEMINATION:	DISCLOSURE DATE: JUL 24, 2023 (USER: ADAM, ADAM)
---	---

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

## 4.8 Count Records by Request Method (MET)

This report shows totals for each request method during the selected date range sorted by facility.

1. Select the beginning and ending ROI Initiated dates.
2. Select the facilities to print the data for.

```

Select ROI REPORTS MENU <TEST ACCOUNT> Option: Count Records by Request Method
Enter beginning ROI Initiated Date: T-90 (JUN 20, 2023)
Enter ending ROI Initiation Date: (6/20/2023 - 9/18/2023): T (SEP 18, 2023)
Print for ALL Facilities? YES//
DEVICE: HOME Virtual
ROI LISTING RECORD STATISTICS SEP 18, 2023 14:28 PAGE 1
REQUEST
METHOD
-----
FACILITY: 2013 DEMO CLINIC
REQUEST METHOD: IN PERSON
SUBCOUNT 1
FACILITY: 2013 DEMO HOSPITAL
REQUEST METHOD: IN PERSON
SUBCOUNT 3
REQUEST METHOD: TELEPHONE CALL
SUBCOUNT 1
REQUEST METHOD: REGULAR MAIL
SUBCOUNT 1
REQUEST METHOD: ELECTRONIC MAIL
SUBCOUNT 1
REQUEST METHOD: FAX
SUBCOUNT 4
FACILITY: 2013 DEMO-3 TRIBAL CLINIC
REQUEST METHOD: IN PERSON
SUBCOUNT 1
REQUEST METHOD: TELEPHONE CALL
SUBCOUNT 1
REQUEST METHOD: REGULAR MAIL
SUBCOUNT 1
COUNT 14
    
```

Figure 4-14: Printing count records by request method report

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

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

1. To print a master log, type **ML** at the ROI Reports menu.
2. Type the beginning date at the “Enter Beginning ROI Initiated Date:” prompt.
3. Type the ending date at the “Enter Ending ROI Initiated Date:” prompt.
4. 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
                                AUG 2,2023                                PAGE 1
DT REC'D      REQ PTY/ADDRESS      PATIENT/HR #      DESCRIPTION
                                PURPOSE                                DT DISCLOSED
-----
                                FACILITY: 2013 DEMO HOSPITAL
07/24/23      REQUESTOR 2451      DEMO,ALLISON      Lab results only
                                HR# 124255        07/24/23
                                ,                INSURANCE         DISCLOSURE #: 29061111125
07/24/23      REQUESTOR 2451      DEMO,ALLISON      THIS IS A TEST
                                HR# 124255        07/24/23
                                ,                FURTHER MEDICAL  DISCLOSURE #: 29061111126
07/24/23      REQUESTOR 100      DEMO,PATIENT TE   ENTIRE RECORD SENT
                                HR# 999912        07/24/23
                                ,                DISABILITY        DISCLOSURE #: 29061111128
07/25/23      MOTHER            COFFEE,FOLGERS   ENTIRE RECORD SENT
                                HR# 113117        07/25/23
                                PENDLETON, OREGON 97801  FURTHER MEDICAL  DISCLOSURE #: 29061111129

```

Figure 4-15: Printing the master log

## 4.10 Print Open Disclosures Only (OP)

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

1. To print open disclosures, type **OP** at the ROI Reports menu.
2. 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.

ROI LISTING RECORD LIST		AUG 2, 2023 14:10		PAGE 1
-----				
FACILITY: 2013 DEMO HOSPITAL				
DATE REQUEST INITIATED: OCT 24, 2001	DISCLOSURE NUMBER: 290621			
PATIENT: DOE, JANE	TYPE: MEDICAL RECORD			
REQUESTING PARTY: REQUESTOR 86	PURPOSE: ATTORNEY			
REQUEST STATUS: OPEN	REQUEST PRIORITY: NON-CRITICAL			
USER INITIATED: DOE, JOHN MD				
SPECIFIC RECORD INFORMATION: 21 TEST	FACILITY: 2013 DEMO HOSPITAL			
DISCLOSURE OPEN COUNTER: 1				
RECEIVING PARTY: REQUESTOR 86				
DATE REQUEST INITIATED: AUG 15, 2001	DISCLOSURE NUMBER: 290647			
PATIENT: DOE, JANE	TYPE: MEDICAL RECORD			
REQUESTING PARTY: REQUESTOR 52	PURPOSE: FURTHER MEDICAL CARE			
REQUEST STATUS: OPEN	REQUEST PRIORITY: NON-CRITICAL			
USER INITIATED: DOE, JOHN MD				
SPECIFIC RECORD INFORMATION: 47 TEST	FACILITY: 2013 DEMO HOSPITAL			
DISCLOSURE OPEN COUNTER: 1				
RECEIVING PARTY: REQUESTOR 52				

Figure 4-16: Printing open disclosures

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

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

1. To print the reproduction page cost report, type **PAGE** at the ROI Reports menu.
2. Type the beginning date at the “Enter Beginning ROI Initiated Date:” prompt.
3. Type the ending date at the “Enter Ending ROI Initiated Date:” prompt.

4. 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)
REPRODUCTION COSTS FOR 2013 DEMO HOSPITAL      AUG  2,2023  14:14      PAGE 1
                                TOTAL
DISCLOSURE          TOTAL REPRODUCTION
NUMBER              PAGES          COST
-----
TOTAL                13302      10170.20
COUNT              11           11
MEAN                 1209       924.56

```

Figure 4-17: Printing reproduction page costs report

## 4.12 Count Records Disseminated by Date (RDIS)

This report shows totals for each dissemination category during the selected date range sorted by facility.

1. 1. Select the beginning and ending ROI Initiated dates.
2. Select the facilities to print the data for.

```

Enter beginning ROI Initiated Date: T-90 (JUN 20, 2023)
Enter ending ROI Initiation Date: (6/20/2023 - 9/18/2023): T (SEP 18, 2023)

Print for ALL Facilities? YES//
DEVICE: HOME;;999 Virtual
ROI DISCLOSURE STATISTICS BY DISSEMINATION      SEP 18,2023  14:44      PAGE 1
RECORD
DISSEMINATION
-----

FACILITY: 2013 DEMO CLINIC
RECORD DISSEMINATION: HAND DELIVER
SUBCOUNT 1
FACILITY: 2013 DEMO HOSPITAL
RECORD DISSEMINATION: HAND DELIVER
SUBCOUNT 4

```

SUBCOUNT 3	RECORD DISSEMINATION: IN PERSON
SUBCOUNT 2	RECORD DISSEMINATION: MAIL CERTIFIED
	FACILITY: 2013 DEMO-3 TRIBAL CLINIC
SUBCOUNT 1	RECORD DISSEMINATION: FAX
SUBCOUNT 1	RECORD DISSEMINATION: MAIL REGULAR
COUNT 12	

Figure 4-18: Printing Count Records Disseminated by Date report

## 4.13 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)
PRIORITY REQUEST REPORT - BY STATUS          AUG 2,2023 14:23    PAGE 1
          REQUEST  REQUEST  STAFF
          PRIORITY STATUS  ASSIGNMENT
-----

```

07/24/23	124255	OTHER	NON-CRI	HOLD	
07/24/23	124255	OTHER	NON-CRI	HOLD	DOE, JOHN
07/24/23	999912	MEDICAL RECORD	NON-CRI	HOLD	DOE, JOHN

Figure 4-19: Printing a priority request report

## 4.14 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)
Release of Information Disclosure System (BRN) v2.0 Patch 1
User Manual 33 ROI Reports Menu (RPT)
May 2008
USER WORKLOAD - **CONFIDENTIAL PATIENT DATA COVERED BY PRIVACY ACT**
AUG 2,2023 14:25 PAGE 1

```

DIS #	DATE	USER INITIATED	PATIENT	HRN #	TYPE	REQUESTING PARTY
29061111128	07/24/23	ADAM, ADAM	DEMO, PATIENT TE	999912	M	REQUESTOR 100
29061111138	07/26/23	PINTO-YAZ	HERO, SUPER	124100	M	REQUESTOR 100
29061111140	07/28/23	PINTO-YAZ	HERO, SUPER	124100	M	REQUESTOR 100

Figure 4-20: Printing a requesting party report

### 4.15 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**
AUG 2, 2023 14:28 PAGE 1
DIS # REQUESTING USER USER RECEIVING
PARTY INITIATED COMPLETED PARTY DISC DT
-----
FACILITY: 2013 DEMO HOSPITAL
290611 REQUESTOR 245 ADAM, ADAM ADAM, ADAM REQUESTOR 245 07/24/23 H
SUSPEND START/STOP DATES: 07/24/23 08/23/23
    
```

Figure 4-21: Printing suspended disclosures only

## 4.16 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**
                                AUG 2,2023 14:31      PAGE 1
DIS #
      DATE          USER          PATIENT          HRN #          TYPE          REQUESTING
      -----          -----          -----          -----          -----          -----
29061111125
      07/24/23  CLERK,B      DEMO,ALLISON      124255      0      REQUESTOR 2451
29061111126
      07/24/23  CLERK,B      DEMO,ALLISON      124255      0      REQUESTOR 2451
29061111128

```



---

07/24/23	CLERK,B	DEMO,PATIENT TE	999912	M	REQUESTOR 100
----------	---------	-----------------	--------	---	---------------

Figure 4-22: Printing user workload

## 5.0 ROI Management

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 P5, Jul 31, 2023        *
*****
                2013 DEMO 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

```

Figure 5-1: 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: DOE, JANE
NAME: DOE, JANE// DOE, JOHN
Select ROI LISTING REC PARTY NAME:

```

Figure 5-2: 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
DOE, JOHN
DATE REQUEST INITIATED: MAY 30,2001// 5-31-01 (MAY 31, 2001)
Select ROI DISCLOSURE DATE REQUEST INITIATED:
```

Figure 5-3: 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.

```
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 5-4: 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: REQUESTOR 13                CITY: LAKE HAVASU CITY
STATE: ARIZONA                    ZIP: 86403
ACTIVE/INACTIVE: ACTIVE

NAME: REQUESTOR 14                CITY: SALEM
STATE: OREGON                     ZIP: 97305-1198
ACTIVE/INACTIVE: ACTIVE

NAME: REQUESTOR 15                CITY: PARKER
STATE: ARIZONA                    ZIP: 85344

```

Figure 5-5: 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:  REQUESTOR 100    R100

DEVICE:  Virtual
ROI LISTING REC PARTY LIST                AUG  3,2023  14:12    PAGE 1
-----
NAME: REQUESTOR 100                MNEMONIC: R100
STREET/PO BOX: 1234 E. FILLMORE      CITY: PHOENIX
STATE: ARIZONA                      ZIP: 85041

```

ACTIVE/INACTIVE: ACTIVE	PHONE NUMBERS: 602-555-5555
CONTACT TYPE: WORK	PHONE NUMBERS: 602-555-5555
CONTACT TYPE: FAX	PHONE NUMBERS: 602-555-5555

Figure 5-6: Inquiring to a specific requesting part

## 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 5-7: 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 . . . Aug 03, 2023 14:15:56 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: Oct 07, 2022 to Aug 03, 2023
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//
Screen Report by . . . Aug 03, 2023 14:29:50 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) Recvg Party Discl Date
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//
Which disclosure item(s): (1-38): 1,2,7,12,16

```

Figure 6-4: 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 6-5: Field length selection

## Example of screen to select sort:

```

Screen Report by . . . Aug 03, 2023 14:36:30 Page: 1 of 1
Sorting Criteria Selection Menu
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
.
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

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 6-6: 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 6-7: Set title, page break, and save logic selections

```

Report Summary before printing report:

Disclosure Request Selection Criteria:
Request Date range: Oct 07, 2022 to Aug 03, 2023
Purpose: TORT ; SUBPOENA
Request Method: TELEPHONE CALL ; FAX

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 6-8: Report summary

## Appendix A Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is FOR OFFICIAL USE ONLY. The RPMS 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. All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general ROB for all users, see the most recent edition of IHS General User Security Handbook (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the IHS Technical and Managerial Handbook (SOP 06-11b).

Both documents are available at this IHS Web site: <http://security.ihs.gov/>.

The ROB listed in the following sections are specific to RPMS.

### A.1 All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

#### A.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 nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions Indian Health Manual Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not:









- 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.

RPMS users shall not:

- Eat or drink near system equipment.

### A.1.12 Awareness

RPMS 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.

### A.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:

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and non-recovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall:

- Remotely access RPMS through a virtual private network (VPN) whenever 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.











**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 shortcut designated to access a particular party, name, or facility.

**Namespace**

A unique set of 2 to 4 alpha characters that are assigned by the database administrator to a software application.

**Non-Critical**

Not critical, does not require immediate attention.

**Official Registering Facility**

A facility so designated that when HRNs are added/modified, those changes are sent to the central database. A Service Unit may have several satellites for which it is registering patients.

**Option**

An entry in the Option file. As an item on a menu, an option provides an opportunity for users to select it, thereby invoking the associated computing activity. Options may also be scheduled to run in the background, non-interactively, by TaskMan.

**Party**

A person or a group

**Queuing**

Requesting that a job be processed at a later time rather than within the current session.

**Receipt dates**

The date that the party received the information

**Receiving Party**

The person or organization that is receiving the information.

**Return key**

Press the Return key to show the end of an entry such as a number or a word. Press the Return key each time you respond to a computer prompt. If you want to return to the previous screen, simply press the Return key without entering a response. This will take you back to the previous menu screen. The Return key on some keyboards are shown as the Enter Key. Whenever you see [RET] or the Return key, press the Return or Enter Key.

**Sequential**

Arranged in a particular order

**Site Specific**

Particular to a specific site

**STAT**

Immediately

**Up-Hat (^)**

A circumflex, also known 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.



## 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/>

**Email:** [itsupport@ihs.gov](mailto:itsupport@ihs.gov)