

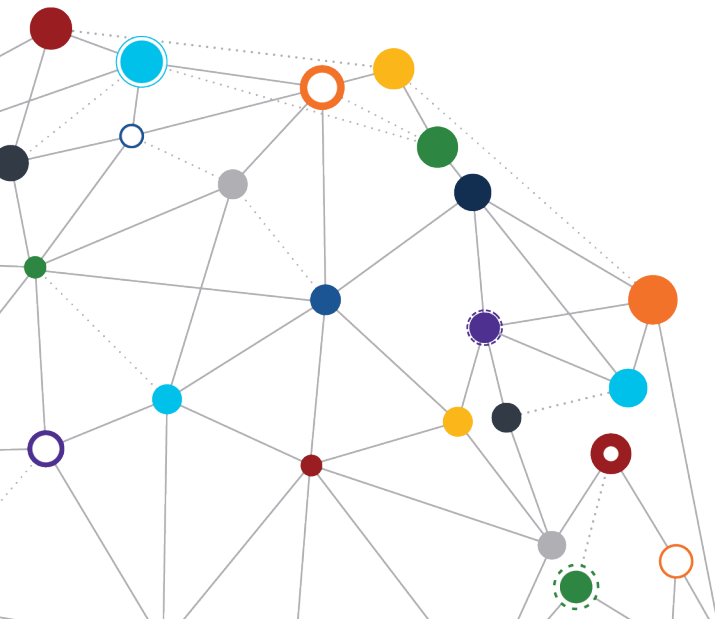


# HealthShare Referral Manager Community Provider User Guide

*Community Care Referral and Authorization (CCRA)  
Managed Services*

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**VA**



**U.S. Department of Veterans Affairs**  
Office of Information and Technology  
*Development, Security, and Operations*



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# 1 Introduction

## 1.1 Project and Solution Overview

Community Care Referral and Authorization (CCRA) is an enterprise-wide system in support of community care used by community care staff to generate referrals and authorizations for Veterans receiving care in the community. Clinical and Department of Veterans Affairs (VA) community care staff located at VA medical centers (VAMCs), outpatient clinics, community-based outpatient clinics (CBOCs), and Veterans Integrated Service Network (VISN) offices use this solution to enhance Veteran access to care. The HealthShare Referral Manager (HSRM) application is an integral component of both the CCRA system and community care information technology (IT) architecture that allows Veterans to receive care from community providers.

HSRM allowed VA to transition from a largely manual process to a more streamlined process that generates standardized referrals and authorizations according to clinical and business rules. HSRM supports clinical and administrative processes that:

- » Seamlessly provide eligible Veterans with prompt referrals to a community provider of their choice
- » Provide community providers with referrals and authorizations consistent with industry standards
- » Decrease the administrative burden on VA clinical and community care staff members by establishing clinical and business pathways that reflect best practices, consistent outcomes, and reduced turnaround times, along with a solution that automates those pathways
- » Facilitate communication between community care staff, third-party administrators (TPAs), and community providers via a unified platform that enables the secure exchange of medical information

HSRM allows VA and community providers to better manage community care referrals and authorizations, resulting in simpler processing for VA and community providers and enhanced patient experience for Veterans.

## 1.2 User Guide Overview

Community providers play a key role in delivering high quality care to Veterans in their communities. HSRM enables community providers to receive and process referrals from VA and share information faster and more accurately than ever before. Community providers, VA, and Veterans all benefit from this new system. This user guide provides details about the community provider's role in processing referrals in HSRM and how to maximize system functionality.

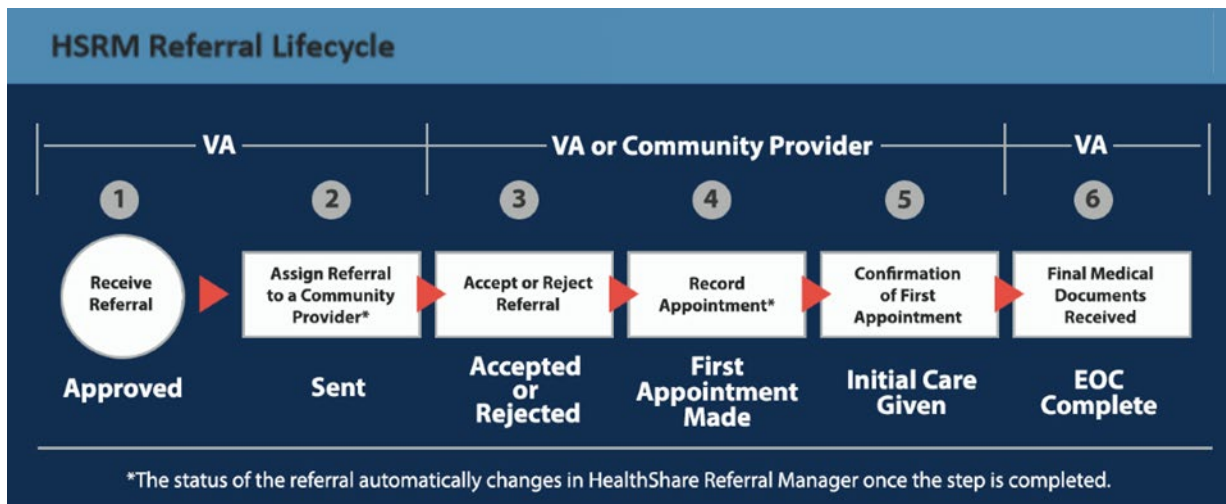
- » *Note: HSRM will be down for routine maintenance on the second Tuesday of every month from 10:00 p.m. to 4:00 a.m. Eastern Time. During this time, users will be unable to access the system.*



## 2 HSRM Lifecycle

A referral's lifecycle begins when the referral is received in HSRM, and it ends when the episode of care (EOC) is complete, and all medical documentation has been received. There are six steps in the lifecycle. Community providers complete steps 3, 4, and 5, as shown in the referral lifecycle diagram.

Figure 1: HSRM Referral Lifecycle



The referral lifecycle model in **Figure 1** shows the steps occurring in the following order, with VA performing steps 1, 2, and 6, and VA or the community provider performing steps 3 through 5:

- » Step 1 is receiving the referral.
  - » Step 2 is assigning the referral to a community provider.
  - » Step 3 is accepting or rejecting the referral.
  - » Step 4 is recording the appointment.
  - » Step 5 is confirming the first appointment.
  - » Step 6 is receiving the final medical documents. This is performed by VA and completes the EOC.
- » *Note: A referral in any status will automatically update to EOC Complete 180 days after the referral expiration date.*

## 3 Accessing HSRM

Staff who typically process referrals, accept, and reject referrals, record appointments, and share medical documentation with VA need HSRM accounts.

To be eligible for HSRM, your facility must have an active Community Care Network (CCN) agreement with TriWest or Optum or have a Veterans Care Agreement (VCA) with VA.

Follow the steps below to sign up for HSRM.

- » *Note: Links to all documents are on the [Office of Community Care web page](#).*

1. Attend a training webinar on [Veterans Health Administration \(VHA\) Training Finder Real-time Affiliate Integrated Network \(TRAIN\)](#), complete the online community provider self-paced eLearning series on [VHA TRAIN](#) (11 modules), or refer to this guide to learn how to use HSRM.
2. Refer to the ID.me user guide to sign up for an ID.me account at the [ID.me website](#).
3. The facility point of contact from your organization fills out the End User Tracker (EUT) with information for staff requiring HSRM access, then submits the EUT to [hsrmsupport@va.gov](mailto:hsrmsupport@va.gov).
  - » *Note: Please ensure the email addresses entered in the EUT match those used for each respective user's ID.me account.*
4. The HSRM Help Desk provides the facility point of contact with confirmation that staff access has been granted.
5. All end users access HSRM via the CCRA website at <https://ccracommunity.va.gov>.
  - » *Note: Users must log in to HSRM at least once every 60 days to maintain their access. If your HSRM account is deactivated, email [hsrmsupport@va.gov](mailto:hsrmsupport@va.gov) to request reactivation.*

Once these steps are complete, contact the VA medical center(s) you work with to let them know you have access to HSRM and to discuss your transition to use HSRM.

## 4 Working in HSRM

### 4.1 Locate a Referral



HSRM allows community providers to locate referrals more quickly and manage them according to their priority. When logging in to the system, the **Referral List** screen—which is also the home screen—appears. The **Referral List** screen features a user to-do list; it shows all of the referrals from VA in a central location and allows users to locate referrals.

Users can locate referrals by sorting the **Referral List** or by using the **Find Referrals** or **Find Referral by Patient** features.

#### 4.1.1 Basic Sort

The **Basic Sort** feature allows users to rearrange all lists in HSRM by column heading. Sorting the **Referral List** allows users to view the information in any column in ascending or descending order. The default view lists referrals by **Date Added** in descending order, making it easy to see the referrals most recently sent from VA.

To locate a referral by using the **Basic Sort** feature:

1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers) at the top left of the screen, then selecting **Referral List** on the menu.

2. Select a column heading to sort data in ascending order by that category. Select it a second time to sort in descending order. Select it a third time to sort by the default, which is **Date Added**, descending.
3. Select the row of the relevant referral to access the **Referral Details** screen.

Figure 2: Referral List

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	

#### 4.1.2 Advanced Sort

The **Advanced Sort** feature provides multiple criteria by which users can sort any **Referral List** in HSRM.

To locate a referral by using the **Advanced Sort** feature:




1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers), then select the **Referral List** on the menu by using the up and down arrows or selecting it.
2. Select the hyperlink on the **Referral List** to display the **Advanced Sort** (screen readers call this “Referral List sorted **Date Added** descending, press enter to open sorting options”).

Figure 3: Referral List – Advanced Sort

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	

3. The available options appear. Users can select both primary and secondary sort criteria. Select **Ascending**  (referred to as the Ascending icon for screen readers) or **Descending**





▼ (referred to as the Descending icon for screen readers) associated with the specific criterion for the sort. In the case shown below, Last Name and Date of Birth have been selected in ascending order. After selecting **Apply**, the referrals will be sorted according to the chosen criteria. Select the row of the relevant referral to view the **Referral Details** screen.

Figure 4: Sorting Options

The screenshot shows the 'HealthShare Referral Manager - QA - R23.0.3.0' interface. The main area displays a 'Referral List' table with columns: Assigned User, Referring Facility, Last Name, First Name, Date of Birth, SSN, Service, Priority, Optional Task(s), Date Added, Referral Number, Category of Care, and Status. The table contains 20 rows of referral data. On the right side, a 'Primary Sort' panel is open, showing a list of criteria with ascending and descending sort icons. The 'Date Added' and 'Date of Birth' criteria are currently selected with ascending sort icons.

### 4.1.3 Find Referrals

In addition to sorting the Referral List, community providers can search for referrals in HSRM using the **Find Referrals** feature. Users can search by referral number, Unique Consult ID, network, treating specialty, provider name, service requested, category of care, date added from, date added to, priority, source of referral, status, and optional task(s).

» *Note: The Status field is mandatory and has multiple statuses selected by default. Users can choose from Accepted, First Appointment Made, Initial Care Given, Rejected, and Sent by removing those that are not desired.*

To find referrals:

1. Select the **Menu** icon (also called link menu for screen readers) from any screen to view the Main Menu.
2. Select **Find Referrals** to navigate to the **Referral Search** screen.



Figure 5: Find Referrals

SN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
0	000000000 Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
0	000000000 Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
0	000000000 Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
0	000000000 Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
0	000000000 Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	
0	000000000 Eye Care Advanced Eye Treatment SEOC 1.2.10 PRCT	Routine		10/25/2022	VA0000006238	OPHTHALMOLOGY	Sent	VACCN TEST Facility	

3. Enter information in any field within the **Referral Search** screen.

Figure 6: Referral Search Screen

Referral Search

Referral Number:

Unique Consult ID:

Network:

Treating Specialty:

Provider Name:

Service Requested:

Category of Care:

Community Provider/Facility:

Multiple Community Providers / Facilities:

Associated Care Provider(s):

Date Added From:

Date Added To:

Priority:

Source Of Referral:

\* Status:

Accepted X First Appointment Made X Initial Care Given X Sent X

Optional Task(s):

Multiple Optional Task(s):

HealthShare Referral Manager

Find

4. Select the **Find** button. The resulting **Referral List** screen lists referrals that match the search criteria.

» **Notes:**

- When the values are entered for more than one field, HSRM looks for records that match all fields. There is no “or” search available.
- The search is not case sensitive (e.g., there is no difference between Smith, smith, and SMITH).
- The search looks for numbers matching, or starting with, the values entered (e.g., entering 325 will return 325 – 000 but not 000 – 325).



#### 4.1.4 Find Referral by Patient

Community providers can search for a referral using the **Find Referral by Patient** feature. Users will have the patient’s last name, first name, and date of birth as required fields but can also refine their search using the patient’s middle name, birth sex, Social Security Number (SSN), Integration Control Number (ICN), or Electronic Data Interchange Personal Identifier (EDIPI).

To access the Find Referral by Patient feature:


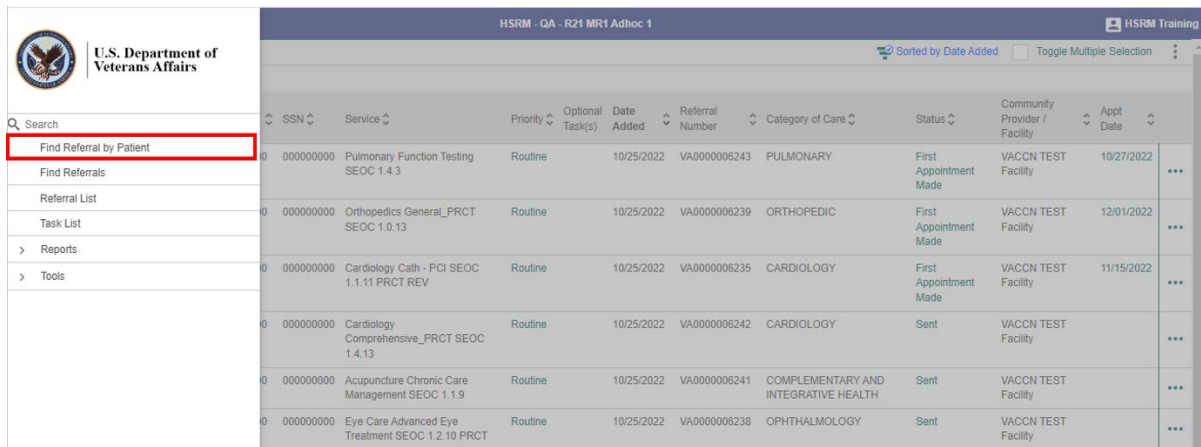
1. Access the menu by selecting the Menu  icon.
2. Select Find Referral by Patient.

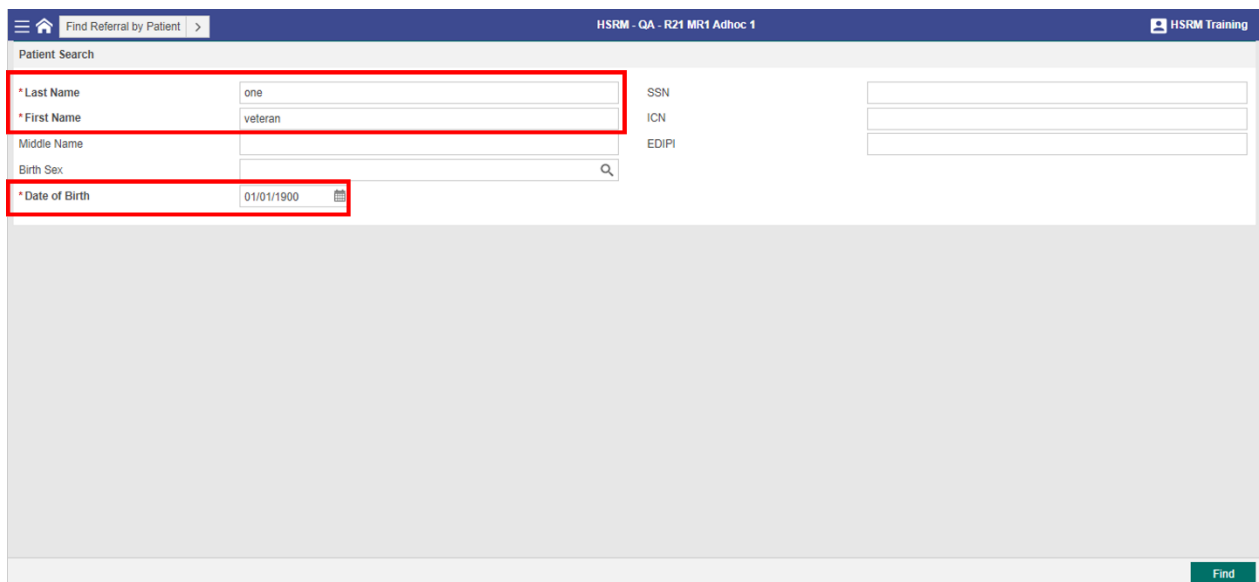
Figure 7: Find Referral by Patient



SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date	
0 000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022	...
0 000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022	...
0 000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022	...
0 000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility		...
0 000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility		...
0 000000000	Eye Care Advanced Eye Treatment SEOC 1.2.10 PRCT	Routine		10/25/2022	VA0000006238	OPHTHALMOLOGY	Sent	VACCN TEST Facility		...

3. Populate the required fields (i.e., Last Name, First Name, and Date of Birth) and any other optional fields (if known). Select the Find button to generate the search.

Figure 8: Patient Search Screen



Find Referral by Patient

U.S. Department of Veterans Affairs

SSN

ICN

EDIPI

\*Last Name: one

\*First Name: veteran

Middle Name:

Birth Sex:

\*Date of Birth: 01/01/1900

Find



4. The resulting **Patient List** will show patients that match the search criteria. Select the row of the patient to view a Referral List for that specific patient.

Figure 9: Patient List

Last Name	First Name	Middle Name	Birth Sex	Date of Birth	Age	Address	City	State	ZIP Code
ONE	Veteran		Male	01/01/1900	123 Yrs				
ONE	Veteran		Male	01/01/1900	123 Yrs				

## 4.2 Manually Change the Status of a Referral

The referral status shows where a referral is in its lifecycle. As shown in **Figure 1**, the possible statuses are Approved, Sent, Accepted, Rejected, First Appointment Made, Initial Care Given, and EOC Complete. Community providers have access to all statuses except Approved and EOC Complete.

To manually update the status of a referral:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.

Figure 10: Referral Details Screen

HealthShare Referral Manager - QA - R23.0.3.0

ONE, Veteran      DOB: 01/01/1900      Age: 123 Yrs

**Referral Details**

\*Referring Facility: Togus VA Medical Center  
 Referring Facility Phone: 877-881-7618 or 207-623-8411 ext. 6121 Option 5  
 Referring Facility Fax: 207-626-4780  
 \*Referring Provider: [Redacted]  
 \*Priority: Routine

\*Provisional Diagnosis: S82012Q Displ osteochon fx l patella, 7t  
 \*Referral Date: 09/06/2023  
 Clinically Indicated Date: 09/11/2023  
 \*Referral Expiration Date: 03/04/2024

Level of Care Coordination: Moderate  
 Add/View Documents  
 Veteran's Medical Record

Service/s Requested

Category of Care: ORTHOPEDIC  
 \*Service Requested: Orthopedics General\_REV\_PRCT SEOC 1.0.15  
 SEOC Details

This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above.  
 For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipsis action menu in the top right corner of this screen.  
 If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.  
 Precertification: The Department of Veterans Affairs (VA) is required by law to obtain precertification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer

Apply      Update

3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen. Select the **Status** field and select the new status. Community providers can change the referral status to **Accepted**, **Rejected**, **First Appointment Made** (the status automatically changes to **First Appointment Made** when an initial appointment is recorded), or **Initial Care Given**, depending on where the referral is in its lifecycle.

» *Note: If a user selects the Rejected status, the Referral Return Reason field will be mandatory. Additionally, the Referral Return Reason field is only editable when the user updates the status to Rejected.*

Figure 11: Referral Details – Status Field

HealthShare Referral Manager - QA - R23.0.3.0

ONE, Veteran      DOB: 01/01/1900      Age: 123 Yrs

**Referral Processing Information**

Referral Number: VA000006853  
 \*Status: Accepted  
 Referral Return Reason: [Redacted]  
 Unique Consult ID: 534\_7160  
 \*Network: CC Network 1  
 Extend/Continue Appointment Scheduling Efforts:   
 Audit Trail

Source of Referral: Interfaced from VA  
 Comments: [Redacted]

Date Added: 09/06/2023  
 Update Date: 09/26/2023  
 Update Time: 09:20  
 Update User: HSRM Training  
 Update Facility: Togus VA Medical Center  
 Ordering Officer: HSRM Training  
 Assigned Workgroup: [Redacted]  
 Veteran Communication Preference: [Redacted]  
 C6 Referral:



**Initial Community Provider/Facility Information**

Treating Specialty: Dentist  
 \*Community Provider / Facility: VACCN TEST Facility  
 Provider Location: VACCN TEST Facility-156 WILLIAM ST  
 \*Provider Name: VACCN TEST Facility  
 Affiliation: CCN1

Allocated Date: 09/26/2023  
 Appointment Date: [Redacted]  
 Provider Details

Apply      Update



4. Enter any relevant comments regarding the referral in the **Comments** field of the **Referral Processing Information** section.
5. Select the **Update** button  to save changes and return to the previous screen. Select the **Apply** button  to save changes and stay on the same screen.

» *Note: The C6 Referral checkbox under the Referral Processing Information section pertains to referrals assigned to the Community Care Clinical Coordination Contact Center (C6). These user groups include C6 Supervisor, C6 Administrator, and C6 Clinical Staff. If the box is checked, the users in the C6 groups will be able to view and manage these referrals.*

### 4.3 Access Standardized Episode of Care Information

A Standardized Episode of Care (SEOC) is a bundle of services authorized under a single referral. A SEOC includes all clinically related services for one patient for a discrete diagnostic condition within a specific period across a continuum of care. A SEOC helps reduce the need to seek individual authorization for each element of care. It includes all physician, inpatient, and outpatient care, as well as labs and diagnostics. Within HSRM, the user can view a list of services associated with the SEOC. This is the procedural overview of services.

To view SEOC details:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Navigate to the **Service/s Requested** section on the **Referral Details** screen and select the **SEOC Details** link.

» *Note: VA is required by law to obtain precertification and bill third-party payers (TPPs) for care that is not related to a Veteran's service or to obtain special authority for Veterans who have other health insurance (OHI). Users can find precertification information and instructions under the SEOC Details link and in the Offline Referral Form.*



Figure 12: Referral Details – SEOC Details

HealthShare Referral Manager - QA - R23.0.3.0

ONE, Veteran      DOB: 01/01/1900      Age: 123 Yrs

**Referral Details**

\*Referring Facility: Togus VA Medical Center  
 Referring Facility Phone: 877-881-7618 or 207-623-8411 ext. 6121  
 Referring Facility Fax: 207-626-4780  
 \*Referring Provider: [Redacted]  
 \*Priority: Routine

\*Provisional Diagnosis: S82012Q Displ osteochon fx l patella, 7t  
 \*Referral Date: 09/08/2023  
 Clinically Indicated Date: 09/11/2023  
 \*Referral Expiration Date: 03/04/2024

Level of Care Coordination: Moderate  
 Add/View Documents  
 Veteran's Medical Record

Service/s Requested

Category of Care: ORTHOPEDIC  
 \*Service Requested: Orthopedics General\_REV\_PRCT SEOC 1.0.15  
 SEOC Details

This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above.  
 For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen.  
 If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.  
 Precertification: The Department of Veterans Affairs (VA) is required by law to obtain precertification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer

Apply      Update

#### 4. Review the **Procedural Overview** for the SEOC.

Figure 13: SEOC Details Screen

HealthShare Referral Manager - QA - R22.0.2.1

ONE, Veteran      DOB: 01/01/1900      Age: 123 Yrs

**Procedural Overview**

Orthopedics General\_PRCT SEOC 1.0.13

Description:

Additional Information:

- \*Please visit the VHA Storefront [www.va.gov/COMMUNITYCARE/providers/index.asp](http://www.va.gov/COMMUNITYCARE/providers/index.asp) for additional resources and requirements pertaining to the following:
  - \* Pharmacy prescribing requirements
  - \* Durable Medical Equipment (DME), Prosthetics, and Orthotics prescribing requirements
  - \* Precertification (PRCT) process requirements
  - \* Request for Services (RFS) requirements

SEOC Service	Quantity Limit
Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order	999
Diagnostic imaging relevant to the referred condition on the consult order	999
Labs and pathology relevant to the referred condition on the consult order	999
Diagnostic studies relevant to the referred condition on the consult order including but not limited to: EMG/NCS	999
Anesthesia consultation related to the procedure or surgery relevant to the referred condition on the consult order	999
Pre-procedure medical and basic cardiac clearance, as indicated (including H+P/labs, EKG, CXR, echo) **Note: cardiac testing or evaluation outside of the above CXR, EKG and echo will require an RFS for a	999

### 4.4 Print the Offline Referral Form

Printing the **Offline Referral Form** enables community providers to retain a hard copy of the referral for their files. The **Offline Referral Form** contains referral details, additional referral information, billing and precertification information, patient details, and SEOC information. Community providers can print offline referral forms for individual or multiple referrals.

#### 4.4.1 Individual Referral

To print the **Offline Referral Form** for an individual referral:




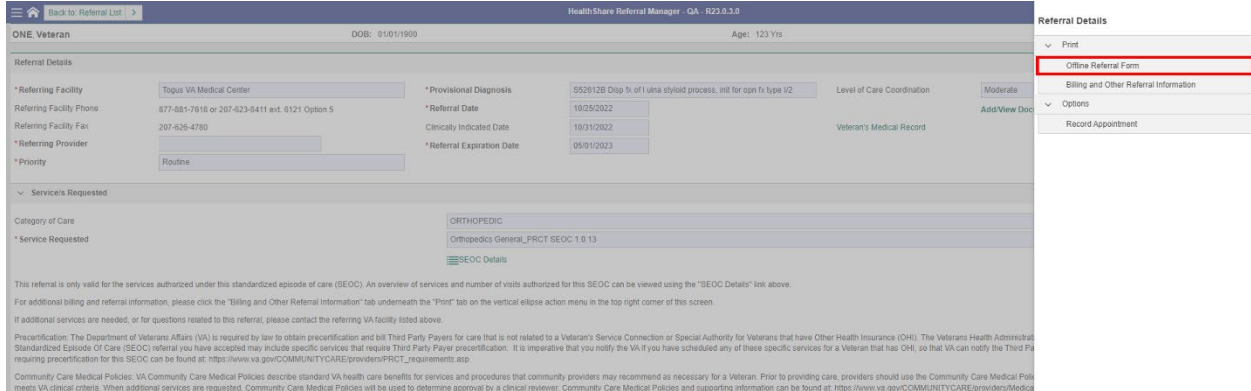


1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the row of the referral to navigate to the **Referral Details** screen.
3. Select the **Component Menu** icon  (also called the Referral List component menu button by screen readers) from the Referral Details section, then select Offline Referral Form from the Print drop-down menu.

Figure 14: Component Menu – Offline Referral Form



4. The **Offline Referral Form** appears, which users can print, download, and save.

Figure 15: Offline Referral Form

**U.S. Department  
of Veterans Affairs**

**VA Form 10-7080 - Approved Referral For  
Medical Care**

---

**Veteran Name:** One, Veteran  
**Veteran ICN:** 1013173133V766967  
**Veteran EDIPI:**  
**Veteran Date of Birth:** 1900-01-01  
**Veteran Preferred Name:**  
**Pronoun:**  
**Pronoun Description:**  
**Veteran Address:**  
  
**Veteran Phone Number:**  
**Veteran Mobile Phone Number (if Known):**  
**Veteran Business Phone Number (if Known):**  
**Veteran Email Address (if Known):**

**Referral Number:** VA000006242  
**Priority:** Routine  
**Referral Issue Date:** 2022-10-25  
**Expiration Date:** PRELIMINARY 2023-04-23 (SEE BELOW)\*  
**First Appointment Date:** SUPPLY TO VA ASAP

**Referring VA Facility:** Togus VA Medical Center  
**VA Telephone Number:** 877-881-7618 or 207-623-8411 ext. 6121 Option 5  
**VA Fax Number:** 207-626-4780



**Initial Community Care Provider/Facility:** VACCN TEST Facility  
**Initial Provider Location:** VACCN TEST Facility-156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X  
**Provider Name (if known):** VACCN TEST Facility  
**Community Provider NPI:** 1205303591  
**Caregiver Type:**

#### 4.4.2 Multiple Referrals

To generate an Offline Referral Form for multiple referrals:



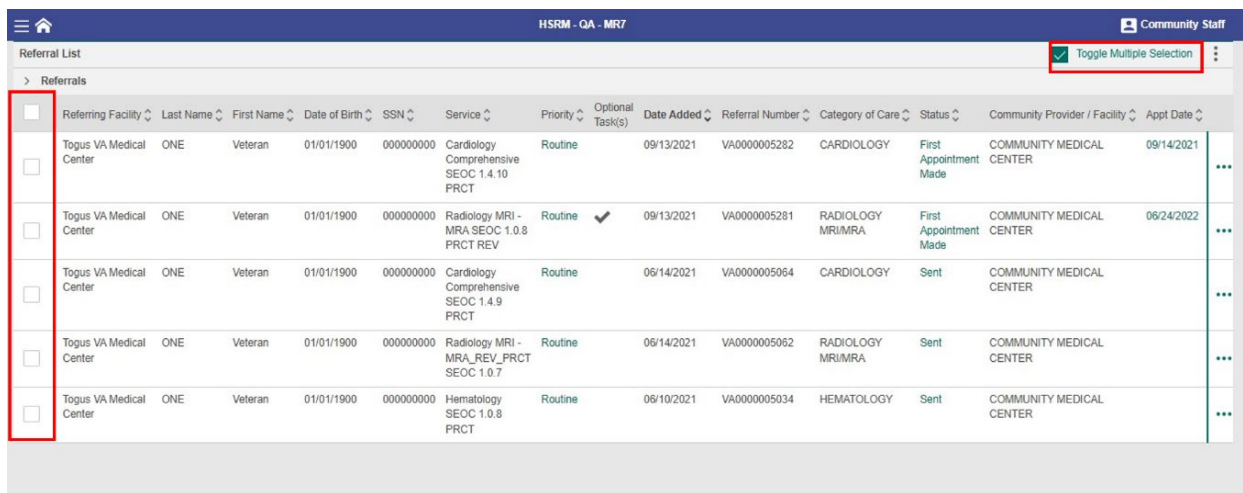


1. Navigate to the **Referral List** by selecting either the **Home** icon  (also called link home for screen readers) or the **Menu** icon  (also called link menu for screen readers), then selecting **Referral List** on the menu by using the up and down arrows or selecting it.

» *Note: Users may generate an Offline Referral Form for multiple referrals from any referral list, including the Veteran’s referral list.*

2. Select the **Toggle Multiple Selections** checkbox  to enable the selection of multiple referrals (for screen readers, select the toggled multiple selection checkbox not checked; to select, press enter), then select the checkboxes next to the appropriate referrals (for screen readers, select the row button for each preferred referral).

Figure 16: Referral List – Multiple Referrals



Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date	
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SECC 1.4.10 PRCT	Routine		09/13/2021	VA0000005282	CARDIOLOGY	First Appointment Made	COMMUNITY MEDICAL CENTER	09/14/2021
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA SECC 1.0.8 PRCT REV	Routine	<input checked="" type="checkbox"/>	09/13/2021	VA0000005281	RADIOLOGY MR/MRA	First Appointment Made	COMMUNITY MEDICAL CENTER	06/24/2022
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive SECC 1.4.9 PRCT	Routine		06/14/2021	VA0000005064	CARDIOLOGY	Sent	COMMUNITY MEDICAL CENTER	
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Radiology MRI - MRA_REV_PRCT SECC 1.0.7	Routine		06/14/2021	VA0000005062	RADIOLOGY MR/MRA	Sent	COMMUNITY MEDICAL CENTER	
<input type="checkbox"/>	Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SECC 1.0.8 PRCT	Routine		06/10/2021	VA0000005034	HEMATOLOGY	Sent	COMMUNITY MEDICAL CENTER	


3. Select the **Component Menu** icon  (also called Referral List component menu button by screen readers) and select **Selected Offline Referral Forms** from the **Email** drop-down menu.

Figure 17: Component Menu – Selected Offline Referral Forms



Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
<input checked="" type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SECC 1.0.6 PRCT REV	Routine	06/14/2020	VA0000000681	CARDIOLOGY TESTS, PROCEDURES, STUDIES
<input checked="" type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Neurology SECC 1.0.6 PRCT	Routine	06/14/2020	VA0000000682	NEUROLOGY
<input checked="" type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SECC 1.0.3 PRCT	Routine	12/11/2019	VA0000000237	ALLERGY AND IMMUNOLOGY
<input checked="" type="checkbox"/>	Batavia VA Medical Center	ONE	Veteran	01/01/1900	000000000	Acupuncture-Chronic Care Management SECC 1.2.4	Routine	01/03/2020	VA0000000264	ACUPUNCTURE
<input type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SECC 1.1.7 PRCT REV	Routine	11/11/2020	VA0000000753	CARDIOLOGY
<input type="checkbox"/>	Lebanon VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SECC 1.1.7 PRCT REV	Routine	11/11/2020	VA0000000754	CARDIOLOGY

4. The **Offline Referral Form** appears.



Figure 18: Multiple Offline Referrals Form

Veteran Approved Referrals for Medical Care Cover Page					
Veteran Name	Referral No	Referral Date	VA Facility	Category of Care	Community Provider/Facility
One, Veteran	VA0000000237	2019-12-11	Lebanon VA Medical Center	ALLERGY AND IMMUNOLOGY	
One, Veteran	VA0000000264	2020-01-03	Batavia VA Medical Center	ACUPUNCTURE	
One, Veteran	VA0000000681	2020-08-14	Lebanon VA Medical Center	CARDIOLOGY TESTS, PROCEDURES, STUDIES	
One, Veteran	VA0000000682	2020-08-14	Lebanon VA Medical Center	NEUROLOGY	

» *Note: Users can download and save the Offline Referral Form. Compiled Offline Referral Forms will contain a cover page.*

## 4.5 Manage Documents

HSRM allows VA and community providers to easily upload and download medical documents such as medical records and images. Prior to providing care to a Veteran, community providers can download and review documents that VA shares regarding the Veteran/patient. Following care, community providers upload relevant patient care documentation for VA’s review. This eliminates faxing and emailing documentation and enhances the accuracy of patient documentation. HSRM accepts most file types, including JPG, BMP, PNG, Microsoft Office, and PDF. JPG and PDF files are displayed in the preview section. There are no limitations on file size.

### 4.5.1 View and Download Documents

To view and download documents:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.
3. Select **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen. Here, users can view all documents that have been added to the referral.

» *Note: Users may also view and download documents by accessing Documents from the Additional Referral Information screen. These instructions are in the View Additional Referral Information section of this guide.*

### 4.5.2 Add Documents

To add documents to a referral:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.



3. Select **Add/View Documents** on the **Referral Details** screen to open the Documents screen.

Figure 19: Referral Details – Add Documents to a Referral

The screenshot shows the 'Referral Details' screen for a veteran. The header includes 'Back to: Referral List', 'HealthShare Referral Manager - QA - R23.0.3.0', and 'HSRM Training'. The veteran's name is 'ONE, Veteran', DOB is '01/01/1900', and Age is '123 Yrs'. The 'Referral Details' section includes fields for 'Referring Facility' (Togus VA Medical Center), 'Provisional Diagnosis' (S82012Q Displ osteochon fx l patella, 7t), 'Referral Date' (09/06/2023), and 'Referral Expiration Date' (03/04/2024). A red box highlights the 'Add/View Documents' button. Below this, the 'Service/s Requested' section shows 'Category of Care' as 'ORTHOPEDIC' and 'Service Requested' as 'Orthopedics General\_REV\_PRCT SEOC 1.0.15'. There is also a 'SEOC Details' link and a paragraph of explanatory text.

4. Select the **New** button  on the **Documents** screen. The **Add Document** screen appears.


5. Enter data in the corresponding fields on the **Add Document** screen.

» *Note: The Date Created, Time Created, and User Created fields populate automatically and are read-only.*

Figure 20: Add Document Screen


The screenshot shows the 'Add Document' screen. The header is the same as Figure 19. The 'Add Document' section includes fields for 'Date Created' (09/26/2023), 'Time Created' (09:40), 'User Created' (HSRM Training), 'Description', and 'Document Type' (Medical Documents). There is an 'Attach File' section with a 'Drop a file here to attach it, or' prompt and 'Upload' and 'Webcam' buttons. The 'Upload' button is highlighted with a green box. At the bottom, there is a 'HealthShare Referral Manager' footer and an 'Update' button.

6. Select the **Upload** button  and select the file from the computer's hard drive.

7. To identify the type of document, select the **Magnifying Glass** icon  (also called document type lookup graphic by screen readers) in the **Document Type** field and choose



the appropriate type (e.g., **Medical Documents** or **Request for Services/SAR**). This will trigger an automatic task for VA to review the document.

8. Select the **Update** button  at the bottom right of the screen to save and go back to the **Documents** screen.
9. Select **Referral Details** from the **Breadcrumb Trail** drop-down list to go back to the **Referral Details** screen or continue to add documents in the same manner.

## 4.6 Record an Appointment

Recording appointments in HSRM makes this information available to VA without having to phone, email, or fax, thus reducing the administrative burden for both VA and community providers. Users can record an appointment in the system from the **Referral Details** screen. Users must record a first appointment for every referral they accept. Recording any subsequent appointments in HSRM is optional.

» *Note: Do not forget to book the appointment in your own external system.*

To record an appointment:


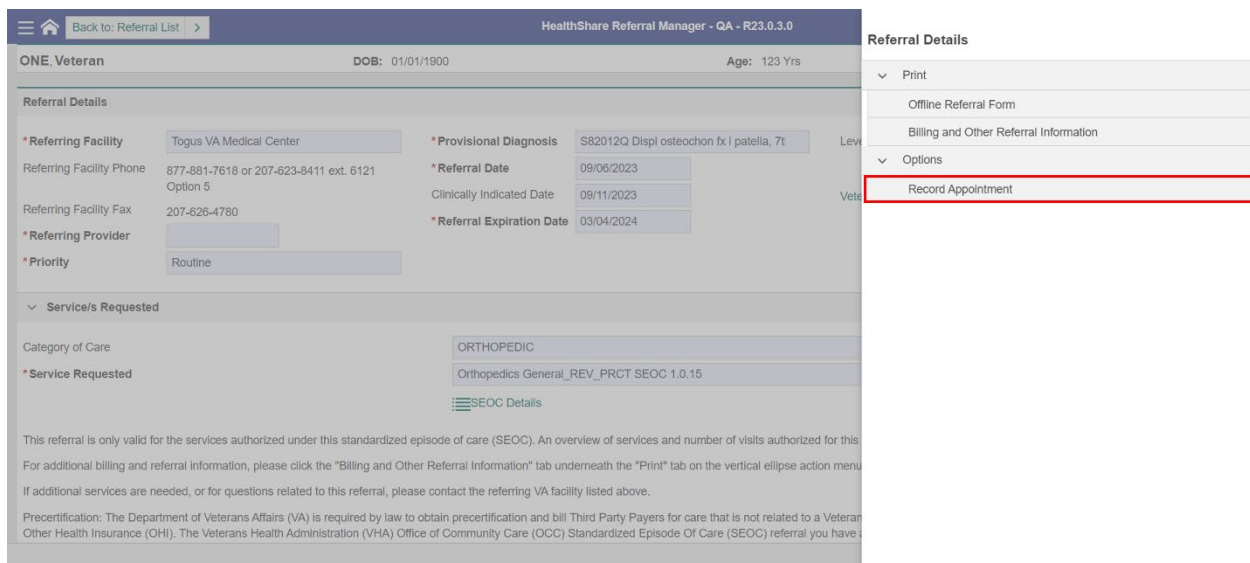
1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the referral to navigate to the **Referral Details** screen.
3. Select the **Component Menu** icon  (also called Referral List component menu button by screen readers) located in the Referral Details section to open the Component Menu.
4. Select **Options** and **Record Appointment**.

Figure 21: Referral Details – Record Appointment



The screenshot displays the 'Referral Details' page for a veteran. The patient information includes 'ONE, Veteran', 'DOB: 01/01/1900', and 'Age: 123 Yrs'. The referral details section contains fields for 'Referring Facility' (Togus VA Medical Center), 'Referring Facility Phone' (877-881-7618 or 207-623-8411 ext. 6121 Option 5), 'Referring Facility Fax' (207-626-4780), 'Referring Provider', 'Priority' (Routine), 'Provisional Diagnosis' (S82012Q Displ osteochon fx l patella, 7t), 'Referral Date' (09/06/2023), 'Clinically Indicated Date' (09/11/2023), and 'Referral Expiration Date' (03/04/2024). The 'Service/s Requested' section shows 'Category of Care' as ORTHOPEDIC and '\*Service Requested' as Orthopedics General\_REV\_PRCT SEOC 1.0.15. A right-hand sidebar menu is open, showing 'Print', 'Offline Referral Form', 'Billing and Other Referral Information', 'Options', and 'Record Appointment', with 'Record Appointment' highlighted by a red border.

5. Enter the appropriate information (e.g., **Service Requested**, **Appointment for**, **Date**, and **Time**). Additionally, if the referral is with a provider in CCNs 1 – 5, HSRM requires users to indicate whether the Veteran self-scheduled the appointment or requested the specific



appointment time. The mandatory question asks, “Did the Veteran self-schedule their appointment or independently request this specific appointment date?”

» *Notes:*

- *HSRM marks mandatory fields with an asterisk (screen readers identify these fields as Star and Required).*
- *The appointment date cannot be earlier than the referral date.*

Figure 22: Record Appointment Screen

The screenshot displays the 'Record Appointment' screen. At the top, there is a navigation bar with 'Back to: Referral Details' and 'HSRM - QA - R21 MR1 Adhoc 1'. Below this, the patient information is shown: 'ONE Veteran', 'DOB: 01/01/1900', and 'Age: 123 Yrs'. The main form area is titled 'Record Appointment' and contains several fields with asterisks indicating they are mandatory. The 'Service Requested' field is populated with 'Orthopedics General\_PRCT SEOC 1.0.13'. The 'Appointment for' field is empty. The 'Scheduling Method' field is empty. The 'Date' field is empty, and the 'Time' field is set to '(EDT) AmericanNew\_York'. There are three dropdown menus: 'Did the Veteran self-schedule their appointment or independently request this specific appointment date?' (empty), 'Treating Specialty' (set to 'Dentist'), and 'Community Provider/Facility' (set to 'PPMS Provider Search'). Below these are two more dropdown menus for 'Appointment Location', with the first showing 'VACCN TEST Facility-156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X' and the second showing 'VACCN TEST Facility'. Other fields include 'Provider Name' (VACCN TEST Facility), 'Affiliation' (CCN1), 'Drive Time', 'Appointment Type', 'Appointment Duration', 'Appointment Reason', and 'Notes'. An 'Update' button is located at the bottom right of the form.

6. If the name of the specific facility caregiver is unknown or the appointment is with a facility caregiver other than the initial community provider, users may search for a community provider using the **Provider Profile Management System (PPMS) Provider Search**. This search component is described in the following section.

#### 4.6.1 Locate a Provider Using the PPMS Provider Search

Users can find a list of providers and their details using the PPMS Provider Search feature. The PPMS Provider Search allows users to search by a provider’s National Provider Identifier (NPI), state, zip code, and affiliation.

» *Note: The secondary provider must be in the same network as the current provider*

1. On the **Record Appointment** screen, select the **PPMS Provider Search** link.



Figure 23: Record Appointment Screen – PPMS Provider Search

The screenshot shows the 'Record Appointment' screen for a veteran. The 'PPMS Provider Search' section is highlighted with a red box. The search results list 'Dentist' and 'PPMS Provider Search'. Other fields include 'Service Requested' (Orthopedics General\_PRCT SEOC 1.0.13), 'Appointment for', 'Date', 'Appointment Location' (VACCN TEST Facility), 'Provider Name' (VACCN TEST Facility), 'Affiliation' (CCN1), 'Drive Time', 'Appointment Type', 'Appointment Duration', 'Appointment Reason', and 'Notes'.

2. Enter the provider’s NPI in the **NPI** field. The **State**, **Zip Code**, and **Affiliation** fields may also be used to narrow the search results. When a zip code is entered into the **Zip Code** field, the **State** field will automatically populate.
3. Select the **Find** button to connect directly to **PPMS** to find the provider with the designated NPI.

Figure 24: PPMS Provider Search Screen – NPI Search

The screenshot shows the 'PPMS Provider Search' screen. The 'NPI' field is highlighted with a red box. The search criteria include 'NPI', 'State', 'Zip Code', and 'Affiliation'. The search results table is empty. The 'Find' button is highlighted with a red box.

4. **Select** the appropriate provider.



Figure 25: PPMS Provider Search Screen – NPI Search Results

The screenshot shows the 'PPMS Provider Search' interface. At the top, it identifies the user as 'ONE, Veteran' with a DOB of 01/01/1900 and an age of 123 Yrs. The search criteria entered are: NPI: 1013010917, State: (empty), Zip Code: (empty), and Affiliation: (empty). Below the search criteria, it states 'Records found: 3 (1s)'. A table displays the search results:

Specialty	Care Provider	Affiliation	Phone	Care Site	Address	Provider NPI	High Performing Provider	At Home Service	Completed Community Provider Training
General Acute Care Hospital	Community Medical Center Inc.	CCN1							
General Acute Care Hospital	Community Medical Center Inc.	TriWest - Choice							
General Acute Care Hospital	Community Medical Center Inc.	TriWest - Choice							

The interface includes a 'Find' button at the bottom right and a 'HealthShare Referral Manager' footer.


Figure 26: Record Appointment Screen

The screenshot shows the 'Record Appointment' screen. It identifies the user as 'ONE, Veteran' with a DOB of 01/01/1900 and an age of 123 Yrs. The appointment details are as follows:

- Service Requested:** Orthopedics General\_PRCT SEOC 1.0.13
- Appointment for:** Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order-ORTHOPEDIC-1.0.13
- Scheduling Method:** Scheduled by Community Provider
- Date:** 09/15/2023, Time: 09:00 (EST), Location: American/New\_York
- Did the Veteran self-schedule their appointment or independently request this specific appointment date?:** Yes
- Treating Specialty:** General Acute Care Hospital
- Community Provider/Facility:** COMMUNITY MEDICAL CENTER
- Appointment Location:** COMMUNITY MEDICAL CENTER
- Provider Name:** Community Medical Center Inc.
- Affiliation:** CCN1
- Drive Time:** (empty)
- Appointment Type:** (empty)
- Appointment Duration:** (empty)
- Appointment Reason:** (empty)

The interface includes an 'Update' button at the bottom right.

» *Note: Scheduling Method, Appointment Type, Appointment Duration, Appointment Reason, and Notes fields are optional. However, entering information in these fields is a best practice, as it ensures that VA and the community provider have access to all relevant appointment information in a central location.*

5. Select the **Update**  button on the **Record Appointment** screen to save the appointment information. The **Referral Details** screen appears, and the status of the referral will automatically change to **First Appointment Made**.



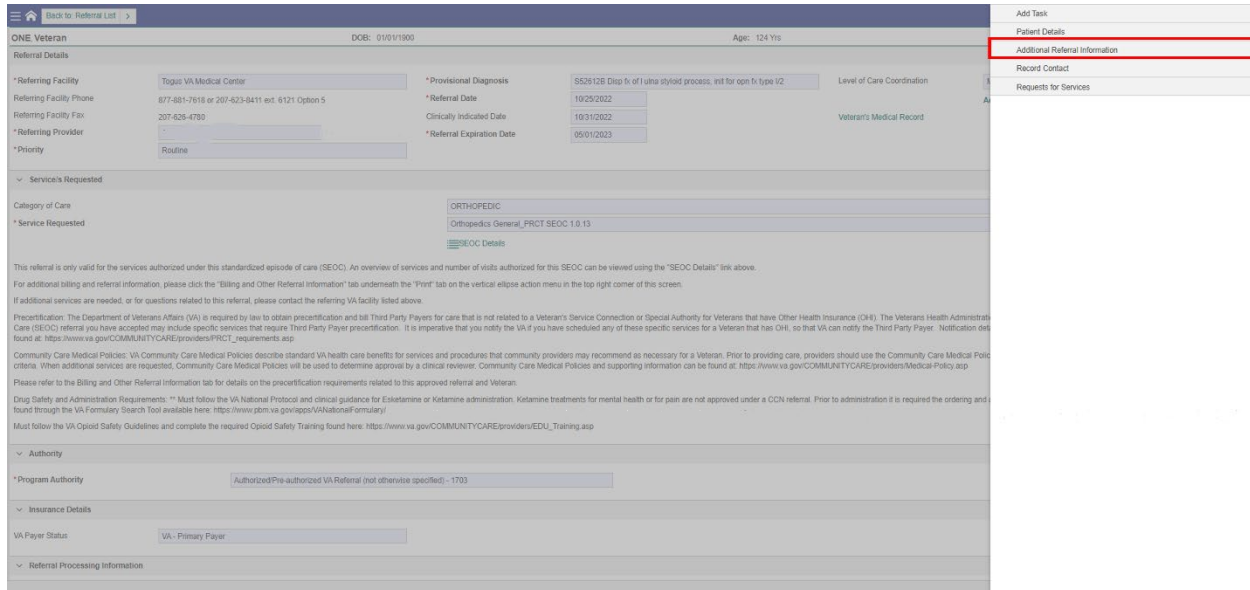
- » *Note: If there is an appointment recorded for a provider other than the initial community provider, that second provider will not see the referral on their Referral List but will instead receive a task on their facility's task list that will allow them to work with the referral.*
- » *Note: The first appointment made in the SEOC will be on the Referral List for the duration of the referral, regardless of subsequent appointments that are scheduled and occur. The date of the first appointment made also displays in the Appointment Date field in the Initial Community Provider/Facility Information section on the Referral Details screen.*

## 4.7 Update the Status of an Appointment

To cancel an appointment:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon **⋮** (also called link Referral List action menu by screen readers) located in the Patient Banner on the **Referral Details** screen and select **Additional Referral Information**.
  - » *Note: The Action Menu icon **⋮** is also available from the end of the referral row on the Referral List.*

Figure 27: Action Menu – Additional Referral Information



3. Locate the appointment from the **Appointments** section and select the **Status** link. The **Appointment Change Status** screen appears.







Figure 28: Additional Referral Information Screen

Referral Number	Community Provider / Facility	Date	Time	Appointment for	Treating Specialty	Appointment Location	Provider Name or Location	Drive Time	Affiliation	Appointment Type	Scheduling Method	Status	Notes	Reason for Cancellation
VA0000006239	VACCN TEST Facility	12/01/2022	10:00	Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- ORTHOPEDIC-1.0.13	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Cancelled by Community Provider
VA0000006239	VACCN TEST Facility	11/30/2022	09:00	Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- ORTHOPEDIC-1.0.13	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Rescheduled by Patient
VA0000006235	VACCN TEST Facility	11/15/2022	14:00	1. Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- CARDIOLOGY-1.1.11	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Booked		

» *Note: Users can also access the Change Status screen by selecting the Appointment For link located on the referral row and then selecting Change Status, located beneath the Appointment Status field.*

4. The **Change Status To** field automatically populates as **Cancelled**. If selecting a different status, select the **Magnifying Glass** icon  (also called change status to lookup graphic by screen readers) in the **Change Status To** field and select a status from the drop-down list.

» *Note: If a user selects No Show, they must also populate the Reason for No Show field.*

5. Select the **Magnifying Glass** icon  (also called reason for cancellation lookup graphic by screen readers) in the **Reason for Cancellation** field and select the appropriate reason for cancellation.

» *Note: Users must choose from one of the available reasons when cancelling:*

- *Cancelled by Community Provider*
- *Cancelled by Patient*
- *Cancelled by VA Staff*
- *Rescheduled by Community Provider*
- *Rescheduled by Patient*
- *Rescheduled by VA Staff*

6. Enter any additional information regarding the appointment cancellation.

» *Note: Users can also use the Free Text for Cancellation field for additional details regarding the appointment (e.g., spoke to Veteran’s family member to cancel the appointment).*



Figure 29: Appointment Change Status Screen


7. Select the **Update** button  to save changes.
8. The appointment status now displays as **Cancelled**. Once a user changes the appointment status to **Cancelled** or **Completed**, the appointment is no longer editable.

Figure 30: Additional Referral Information Screen

Referral Number	Community Provider / Facility	Date	Time	Time Zone Code	Appointment for	Treating Specialty	Appointment Location	Provider Name or Location	Drive Time	Affiliation	Appointment Type	Scheduling Method	Status	Notes	Reason for Cancellation
VA0000006239	VACCN TEST Facility	12/01/2022	10:00		Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- ORTHOPEDIC-1.0.13	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Cancelled by Community Provider
VA0000006239	VACCN TEST Facility	11/30/2022	09:00		Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- ORTHOPEDIC-1.0.13	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Rescheduled by Patient
VA0000006235	VACCN TEST Facility	11/15/2022	14:00		1. Initial outpatient evaluation, treatment and follow up visits for the referred condition indicated on the consult order- CARDIOLOGY-1.1.11	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY, 10038-122300000X	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Cancelled by Patient
VA0000006246	VACCN TEST Facility	11/08/2022	15:00		1. Initial outpatient evaluation, treatment and follow up visits for the	Dentist	VACCN TEST Facility- 156 WILLIAM ST ; FL 4, New York, NY,	VACCN TEST Facility		CCN1	Outpatient		Cancelled		Cancelled by Patient

## 4.8 Record Contact

HSRM enables users to record any contact made with the Veteran, a community provider, or any other person or organization regarding the referral. Anyone with access to the referral can view this information.



» *Note: The Veteran's preferred method of communication appears in a read-only field in the Referral Processing Information section of the Referral Details screen. When reaching out to a Veteran, community providers should view this field first.*

To record contact about a referral:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the referral from the **Referral List**.
3. Select the **Action Menu** icon **...** (also called link Referral List action menu by screen readers) on the **Patient Banner**.
4. Select **Record Contact** from the drop-down menu. The **Record Contact** screen appears.

Figure 31: Action Menu – Record Contact

The screenshot displays the 'Record Contact' interface for a referral. The top navigation bar includes 'Back to Referral List'. The main content area is divided into sections: 'Referral Details', 'Services Requested', 'Authority', and 'Insurance Details'. The 'Referral Details' section includes fields for Referring Facility (Togus VA Medical Center), Referring Facility Phone (877-881-7518 or 207-623-8411 ext. 6121 Option 5), Referring Facility Fax (207-626-4700), Referring Provider, Priority (Routine), Provisional Diagnosis (S32612B Disg ft of ulna styloid process, int for spr fx type I/2), Referral Date (1/02/2022), Clinically Indicated Date (1/03/2022), Referral Expiration Date (05/01/2023), Level of Care Coordination, and Veterans Medical Record. The 'Services Requested' section shows 'Category of Care' as ORTHOPEDIC and 'Service Requested' as Orthopedics General\_FRCT SEOC 1.0.13. The 'Authority' section shows 'Program Authority' as Authorized/Pre-authorized VA Referral (not otherwise specified) - 1703. The 'Insurance Details' section shows 'VA Payer Status' as VA - Primary Payer. On the right side, there is an 'Action Menu' with options: Add Task, Patient Details, Additional Referral Information, Record Contact (highlighted with a red box), and Requests for Services. At the bottom right, there is an 'Update' button.


5. Enter the relevant information regarding the contact and select the **Update** button  to save changes.



Figure 32: Record Contact – Record Contact Screen

The screenshot shows a web application interface for recording contact information. At the top, there is a navigation bar with a 'Back to: Referral Details' link and a user profile for 'HSRM - QA - R21 MR1 Adhoc 1'. Below this, a patient banner identifies the patient as 'ONE, Veteran' with a DOB of 01/01/1900 and an age of 123 Yrs. The main content area is titled 'Record Contact' and contains a form with the following fields:

- Referral Number: VA000006241
- Contact Method: Phone
- Contact Date: 03/17/2023
- Contact Time: 11:00
- Contact Status: Completed
- Contact Outcome: (empty field)
- Indirect Time (mins): (empty field)
- Interpreting Time (mins): (empty field)
- Update User Facility: VACCN TEST Facility

An 'Update' button is located at the bottom right of the form area.

## 4.9 View Additional Referral Information

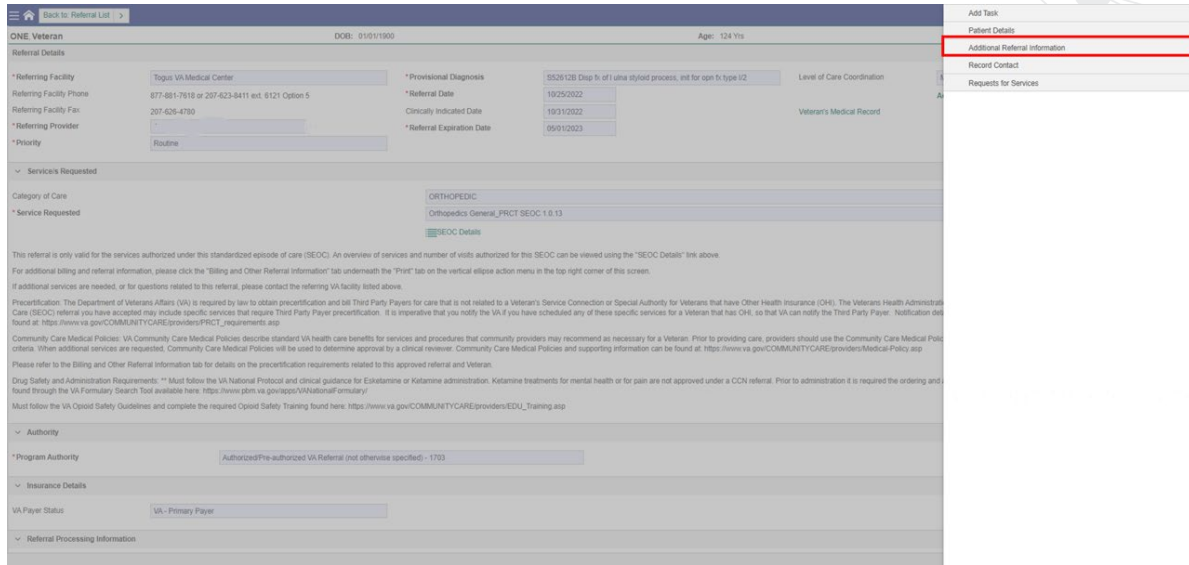
Users can view additional information about a referral on the Additional Referral Information screen. This screen displays contacts, appointments, referral documents, care coordination documents, referral consult factors, referral notes, and patient letters.

To view additional referral information:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon (also called link Referral List action menu by screen readers) next to the corresponding referral row and select Additional Referral Information.

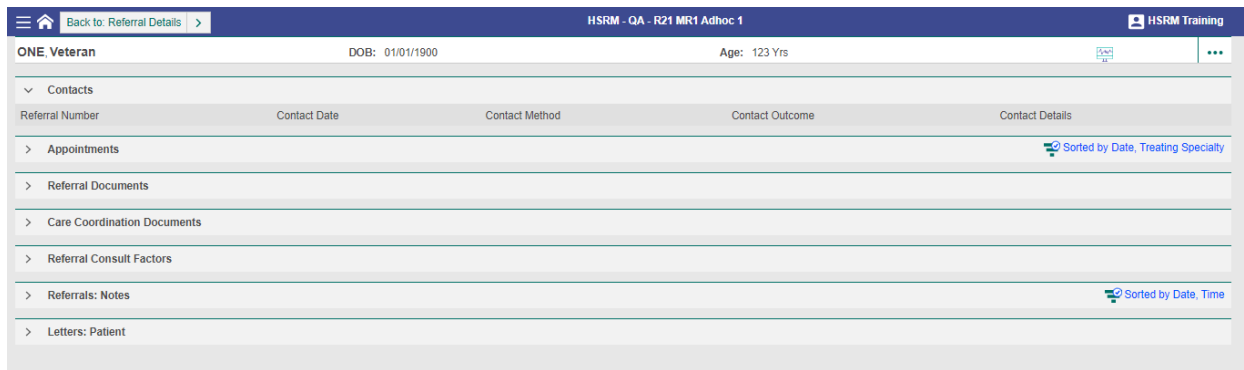
» *Note: The Action Menu icon (also called link Referral List action menu by screen readers) is also available from the Referral Details screen in the Patient Banner.*

Figure 33: Referral List – Additional Referral Information



3. The **Additional Referral Information** screen appears, showing contacts, appointments, referral documents, care coordination documents, referral consult factors, referral notes, and patient letters related to the referral. Select each to view the corresponding information.

Figure 34: Additional Referral Information



» *Note: Users can sort each list using the column header and advanced sorting methods.*

## 4.10 Working with Tasks

A task in HSRM represents a discrete action that users must complete for a Veteran’s referral. Tasks minimize administrative burdens and streamline communications. They enable VA and community providers to share information without having to pick up the phone. Automatic tasks serve as reminders for submitting medical documents and precertification information, minimizing potential delays in payment.

For example, a community provider will receive an auto-generated task from VA to submit medical documentation seven days after the referral status is changed to **Initial Care Given**.



Alternatively, the community provider can create a manual task to communicate with VA (e.g., to request VA to contact the Veteran or to provide additional referral documents).

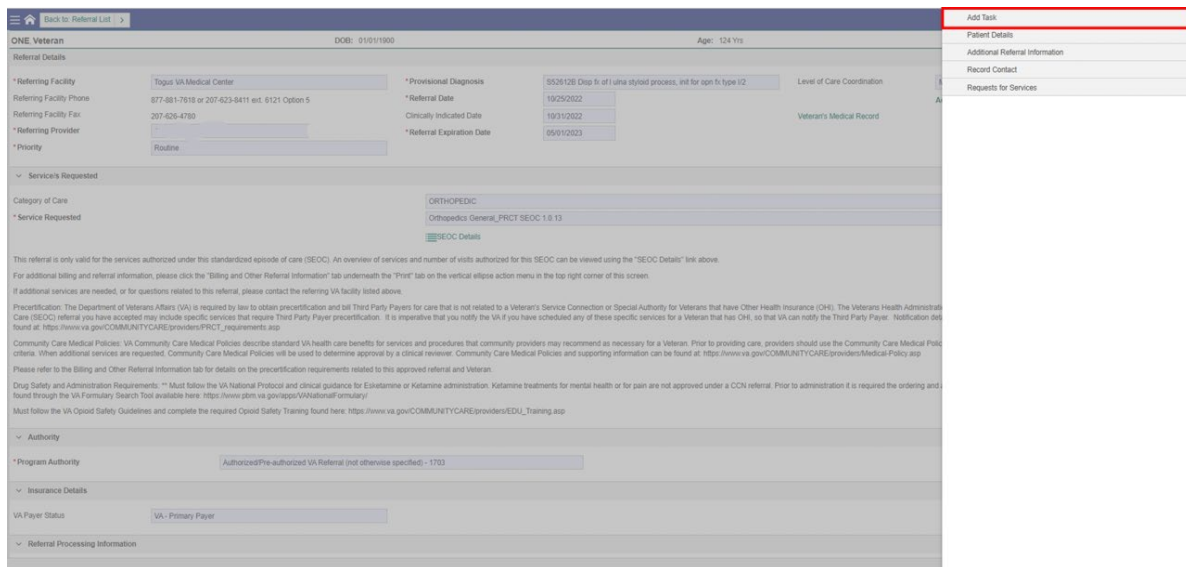
#### 4.10.1 Create a Task

To manually create a task:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Action Menu** icon **⋮** (also called link Referral List action menu by screen readers) next to the corresponding referral row, then select **Add Task**.

» *Note: The Action Menu icon **⋮** (also called link Referral List action menu by screen readers) is also available from the Referral Details screen in the Patient Banner.*

Figure 35: Action Menu – Add Task



3. The **Task Edit** screen appears.
4. Enter the appropriate information (e.g., **Task Item**, **Priority**, **Status**, **Comments**) to create the task. **Task Item**, **Priority**, **Status**, **Due Date**, and **Start Date** fields are mandatory (as denoted by the red asterisk) and users can edit them. Screen readers identify these fields as **Star** and **Required**.



Figure 36: Task Edit Screen

**Task Edit**

\* Task Item: Message from Community to VA

\* Priority: Urgent

\* Status: Pending

Assign Task to User: [Search]

Assigned To User: [Search]

Assign Task to Group: [Search]

Assigned Facility: Batavia VA Medical Center



Due Date: 05/24/2022

\* Start Date: 05/24/2022

Comments: Need additional treatment notes

HealthShare Referral Manager

Accept Task Update

5. Select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) within each field to view and select available options.
6. Select the **Update** button  to save the task information.

#### 4.10.2 View or Edit a Task

The **Task List** displays all task items for the facility. From the **Task List**, users can review and edit an item.

To view the Task List:


1. Select the **Menu** icon  (also called link menu for screen readers) and select **Task List** from the drop-down options.

Figure 37: Menu – Task List

HSRM - QA - R21 MR1 Adhoc 1

Sorted by Date Added

U.S. Department of Veterans Affairs

Find Referral by Patient

Find Referrals

Referral List

**Task List**

> Reports

> Tools

SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	
000000000	Eye Care Advanced Eye Treatment SEOC 1.2.10 PRCT	Routine		10/25/2022	VA0000006238	OPHTHALMOLOGY	Sent	VACCN TEST Facility	



2. Locate the task on the **Task List**. Users can sort the Task List in the same way that they would sort the Referral List, by selecting the column headings or by sorting tasks with the Advanced Sort hyperlink.

Users can also filter their Task List to locate specific tasks. There are several filtering criteria, including Task Item, Date To/From, Last Name Start/End, Category of Care, Assigned User, Assigned Group, Assigned Facility, and more.

To filter the **Task List**:


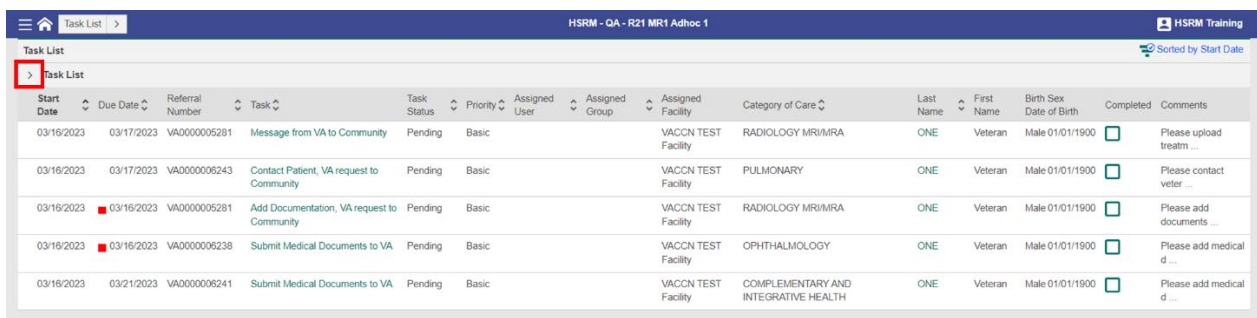
1. Select the arrow icon  at the top of the **Task List** to open the filtering options.

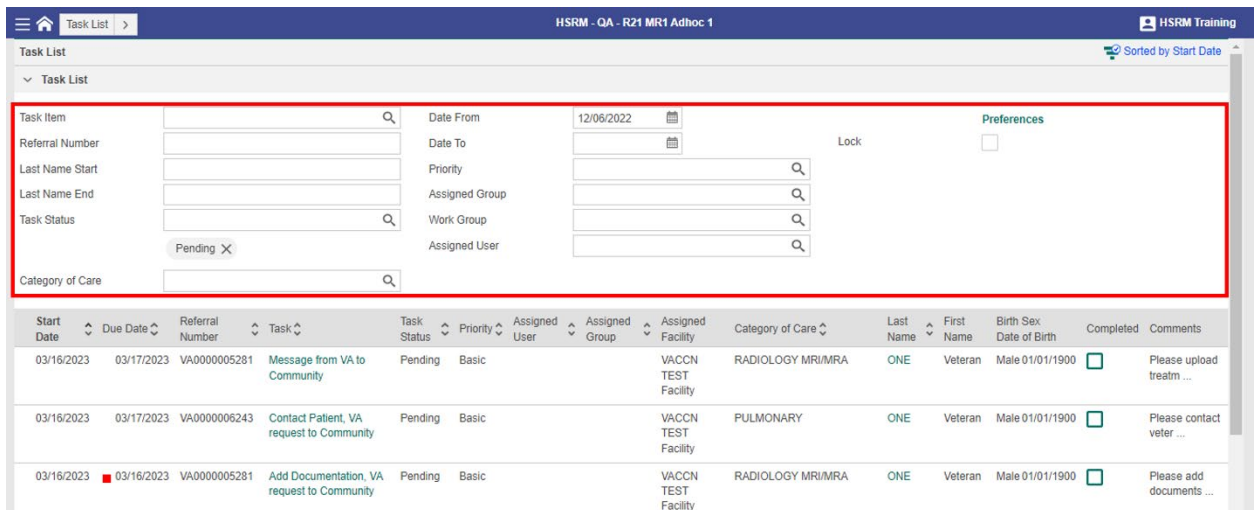
Figure 38: Task List Header Row



Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
03/16/2023	03/17/2023	VA0000005281	Message from VA to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please upload treatm ...
03/16/2023	03/17/2023	VA0000005243	Contact Patient, VA request to Community	Pending	Basic			VACCN TEST Facility	PULMONARY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please contact veter ...
03/16/2023	03/16/2023	VA0000005281	Add Documentation, VA request to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add documents ...
03/16/2023	03/16/2023	VA0000006238	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	OPHTHALMOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add medical d ...
03/16/2023	03/21/2023	VA0000006241	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	COMPLEMENTARY AND INTEGRATIVE HEALTH	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add medical d ...

2. Enter the desired filtering criteria.

Figure 39: Task List Filters



Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
03/16/2023	03/17/2023	VA0000005281	Message from VA to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please upload treatm ...
03/16/2023	03/17/2023	VA0000005243	Contact Patient, VA request to Community	Pending	Basic			VACCN TEST Facility	PULMONARY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please contact veter ...
03/16/2023	03/16/2023	VA0000005281	Add Documentation, VA request to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add documents ...

3. Select the **Find** button  to filter the **Task List** by the chosen criteria.

To view and edit a task:

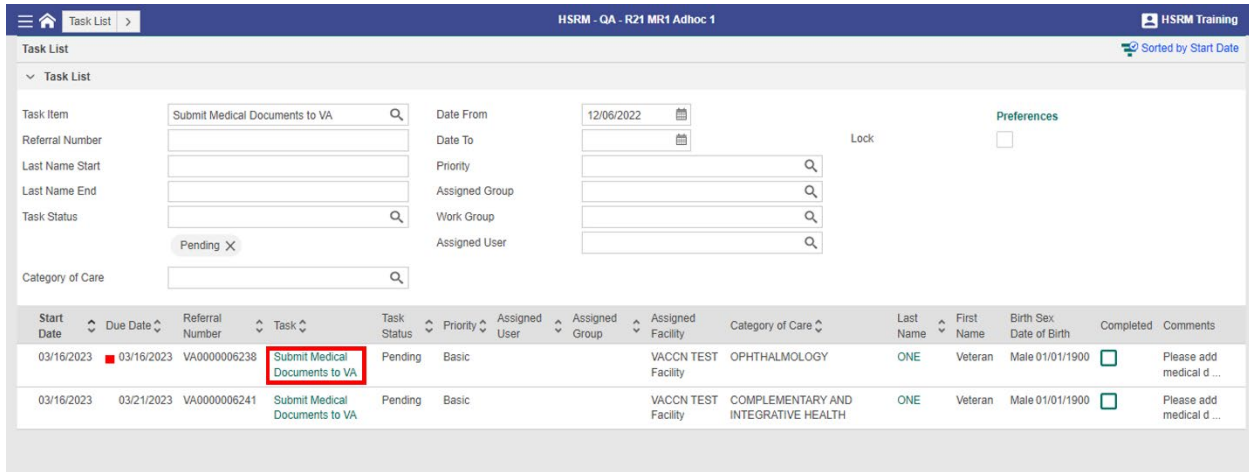




1. Select the task title in the **Task** column to navigate to the **Task Edit** screen (data in the **Task** and **Last Name** columns are displayed as hyperlinks). The **Task Edit** screen appears.

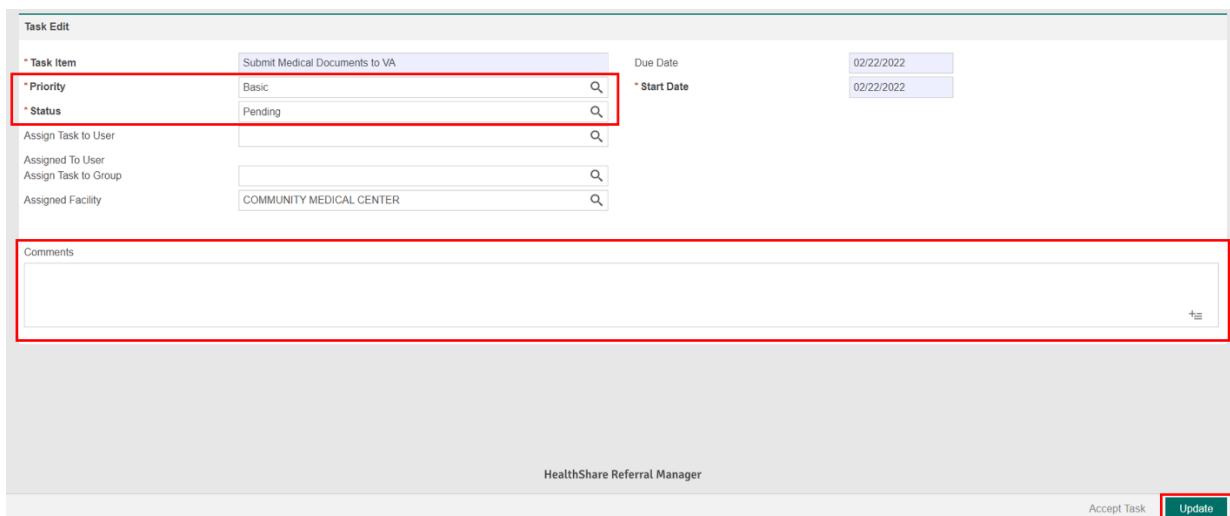
» *Note: Overdue tasks have a red indicator in the Due Date column (screen readers read the date to indicate overdue tasks).*

Figure 40: Task List Screen



2. Review the task, including any comments.
3. Edit the **Priority** and **Status** fields as needed. To do this, select the **Magnifying Glass** icon (also called lookup graphic by screen readers) within each field and select the appropriate option.
4. Edit the **Comments** field.

Figure 41: Task Edit Screen



5. Select the **Update** button  at the bottom right to save the task information and go back to the **Task List**.



Figure 42: Task List

Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex	Date of Birth	Completed	Comments
03/16/2023	03/17/2023	VA000005281	Message from VA to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please upload treatm ...
03/16/2023	03/17/2023	VA000005243	Contact Patient, VA request to Community	Pending	Basic			VACCN TEST Facility	PULMONARY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please contact veter ...
03/16/2023	03/16/2023	VA000005281	Add Documentation, VA request to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add documents ...
03/16/2023	03/16/2023	VA000005238	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	OPHTHALMOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add medical d ...
03/16/2023	03/21/2023	VA000005241	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	COMPLEMENTARY AND INTEGRATIVE HEALTH	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add medical d ...

6. After editing the task, users can complete the task by selecting the task row to access the section of the referral where they can complete the task.

Figure 43: Referral Details Screen

ONE Veteran DOB: 01/01/1900 Age: 123 Yrs

**Referral Details**

\*Referring Facility: Togus VA Medical Center  
 Referring Facility Phone: 877-881-7618 or 207-623-8411 ext. 6121 Option 5  
 Referring Facility Fax: 207-626-4780  
 \*Referring Provider: NPI:  
 \*Priority: Routine

\*Provisional Diagnosis: H542X12 Low vision r eye category 1, low v  
 \*Referral Date: 10/25/2022  
 Clinically Indicated Date: 10/31/2022  
 Referral Expiration Date: 10/25/2023

Level of Care Coordination: Moderate  
 Add/View Documents  
 Veteran's Medical Record

Service/s Requested  
 Category of Care: OPHTHALMOLOGY  
 \*Service Requested: Eye Care Advanced Eye Treatment SEOC 1.2.10 PRCT  
[SEOC Details](#)

This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above.  
 For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen.  
 If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.

Pre-certification: The Department of Veterans Affairs (VA) is required by law to obtain pre-certification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer pre-certification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has OHI, so that VA can notify the Third Party Payer. Notification details and specific care requiring pre-certification for this SEOC can be found at: [https://www.va.gov/COMMUNITYCARE/providers/PRCT\\_requirements.asp](https://www.va.gov/COMMUNITYCARE/providers/PRCT_requirements.asp)

Apply Update

7. When users update a task, they can mark the task as complete.

### 4.10.3 Mark a Task Complete

From the **Task List**, users can mark an item as complete.

To mark a task as complete:




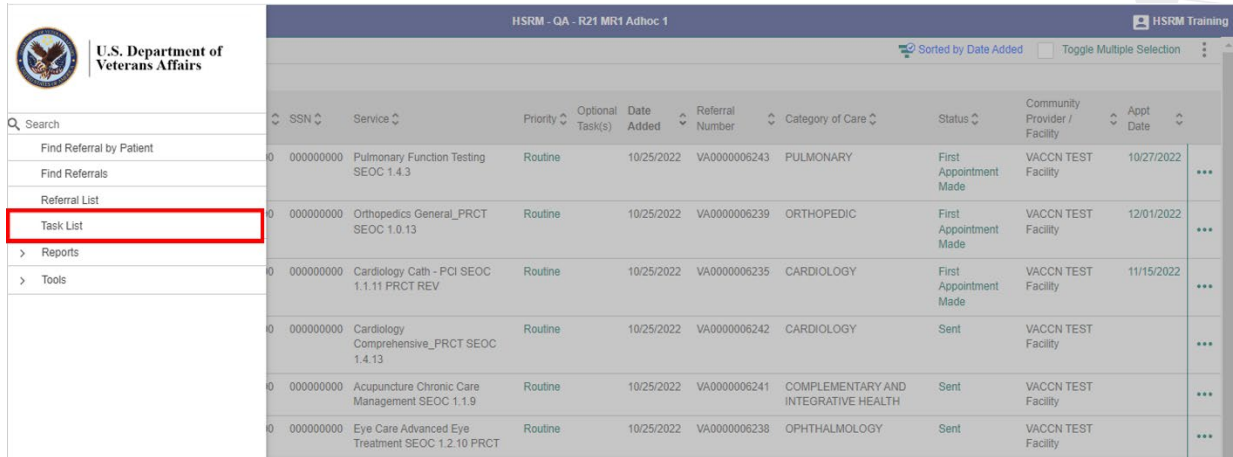
1. Select the **Menu** icon  (also called link menu for screen readers) and select the **Task List** option.

Figure 44: Menu – Task List

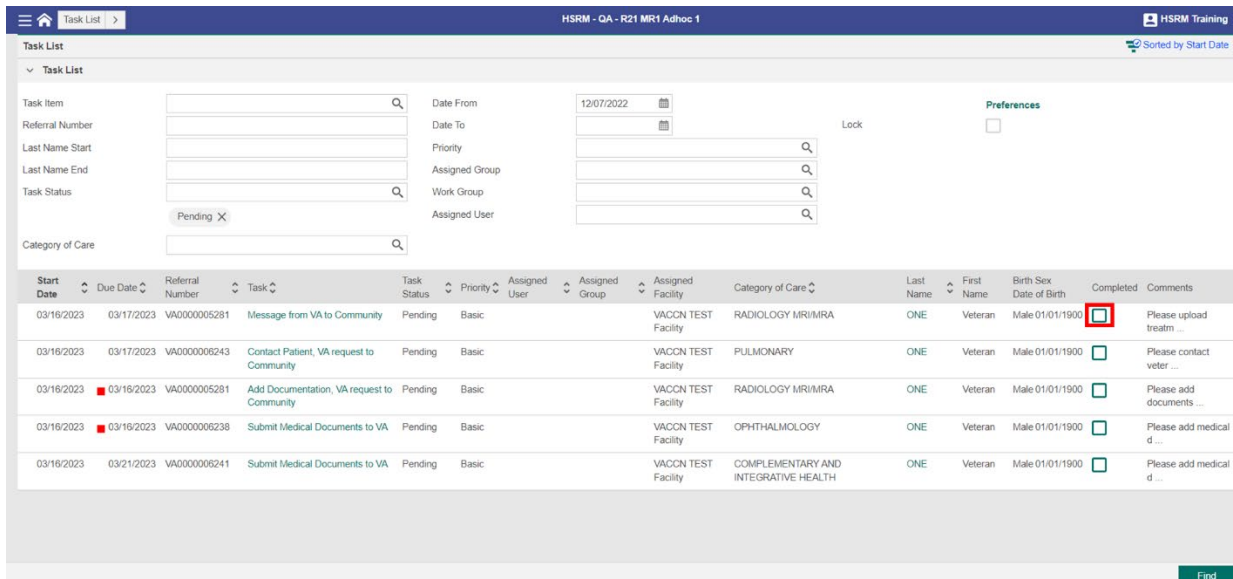


SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	
000000000	Eye Care Advanced Eye Treatment SEOC 1.2.10 PRCT	Routine		10/25/2022	VA0000006238	OPHTHALMOLOGY	Sent	VACCN TEST Facility	

2. Locate the task on the **Task List**.
3. Select the box in the **Completed** column of the task.

» *Note: You may also use the Breadcrumb Trail to return to the Task List and mark the task as Complete.*

Figure 45: Task List Screen



Start Date	Due Date	Referral Number	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Birth Sex Date of Birth	Completed	Comments
03/16/2023	03/17/2023	VA0000005281	Message from VA to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male 01/01/1900	<input checked="" type="checkbox"/>	Please upload treatm...
03/16/2023	03/17/2023	VA0000006243	Contact Patient, VA request to Community	Pending	Basic			VACCN TEST Facility	PULMONARY	ONE	Veteran	Male 01/01/1900	<input type="checkbox"/>	Please contact veter...
03/16/2023	03/16/2023	VA0000005281	Add Documentation, VA request to Community	Pending	Basic			VACCN TEST Facility	RADIOLOGY MRI/MRA	ONE	Veteran	Male 01/01/1900	<input type="checkbox"/>	Please add documents ...
03/16/2023	03/16/2023	VA0000006238	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	OPHTHALMOLOGY	ONE	Veteran	Male 01/01/1900	<input type="checkbox"/>	Please add medical d ...
03/16/2023	03/21/2023	VA0000006241	Submit Medical Documents to VA	Pending	Basic			VACCN TEST Facility	COMPLEMENTARY AND INTEGRATIVE HEALTH	ONE	Veteran	Male 01/01/1900	<input type="checkbox"/>	Please add medical d ...

## 4.11 Requests for Services

If a community provider needs a new referral from VA, either due to an expiring referral or the provider needs to provide a service not currently included in the SEOC, a **Request for Services**



form must be submitted from an existing referral. The user can upload a completed and signed **Request for Services** form into HSRM or use the online **Request for Services Questionnaire**.

To upload a signed **Request for Services** form in HSRM, please see the [Manage Documents](#) section of this guide.

To use the online Request for Services Questionnaire, the community provider facility must have a user provisioned with the Community Care Provider HSRM Security Group to electronically sign the online RFS form. To receive access to the Community Care Provider HSRM Security Group and electronically sign the online RFS, the user must be a credentialed M.D. A Community Staff user can complete the online RFS form and send it to the Community Care Provider user for signature.

*To complete the online Request for Services Questionnaire:*

1. Select the **Action Menu** **...** icon on the corresponding referral row or from the **Patient Banner** on the **Referral Details** screen.

Figure 46: Action Menu

The screenshot displays the HSRM Referral Details screen for a patient named ONE Veteran (DOB: 01/01/1900, Age: 124 Yrs). The screen is titled "Referral Details" and contains several sections:

- Referring Facility:** Togus VA Medical Center. Referring Facility Phone: 877-881-7618 or 207-623-8411 ext. 6121 Option 5. Referring Facility Fax: 207-626-4780.
- Referring Provider:** (Name and NPI fields are present but empty).
- Priority:** Routine.
- Provisional Diagnosis:** S52612B Disp fx of l ulna styloid process.
- Referral Date:** 10/25/2022.
- Clinically Indicated Date:** 10/31/2022.
- Referral Expiration Date:** 05/01/2023.
- Level of Care Coordination:** Moderate.
- Service/s Requested:** Category of Care: ORTHOPEDIC. Service Requested: Orthopedics General\_PRCT SEOC 1.0.13. A link for "SEOC Details" is provided.

Additional information at the bottom of the screen includes a disclaimer: "This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the 'SEOC Details' link above." and a note about precertification requirements. At the bottom right, there are "Apply" and "Update" buttons.

2. Select **Requests for Services**.



Figure 47: Requests for Services Option

The screenshot shows a web application interface for a veteran's referral. At the top, there is a navigation bar with a home icon and a 'Back to Referral List' link. Below this, the veteran's information is displayed: 'ONE Veteran', 'DOB: 01/01/1900', and 'Age: 124 Yrs'. The main content area is divided into several sections: 'Referral Details' (including Referring Facility, Referral Date, and Referral Expiration Date), 'Service's Requested' (showing 'ORTHOPEDIC' and 'Orthopedics General\_PRCT SEOC 1.0.13'), and 'Authority' (showing 'Authorized/Pre-authorized VA Referral (not otherwise specified) - 1703'). On the right side, there is a vertical menu with options: 'Add Task', 'Patient Details', 'Additional Referral Information', 'Record Contact', and 'Requests for Services'. The 'Requests for Services' option is highlighted with a red rectangular box.

3. On the **Requests for Services** screen, select the **New** icon  **New**.

» *Note: Any Requests for Services previously submitted will appear on the Requests for Services screen.*

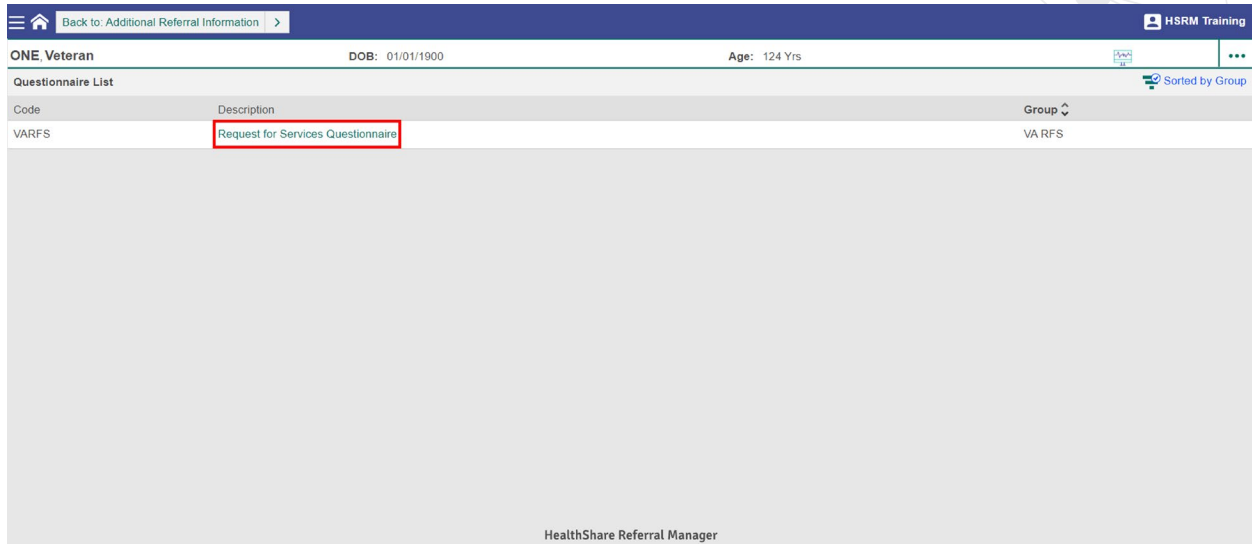
Figure 48: Requests for Service New Icon

The screenshot shows the 'Requests for Services' screen with a table of questionnaires. The table has columns for 'Questionnaire', 'Date of Request', 'Current Status', 'Adjudication', 'Requester Facility', and 'Organization Name'. The table is currently empty, with the text 'HealthShare Referral Manager' centered below it. In the top right corner of the table header, there is a 'New' icon (a green plus sign in a white circle) highlighted with a red rectangular box.

4. On the **Questionnaire List** screen, select **Request for Services Questionnaire**.

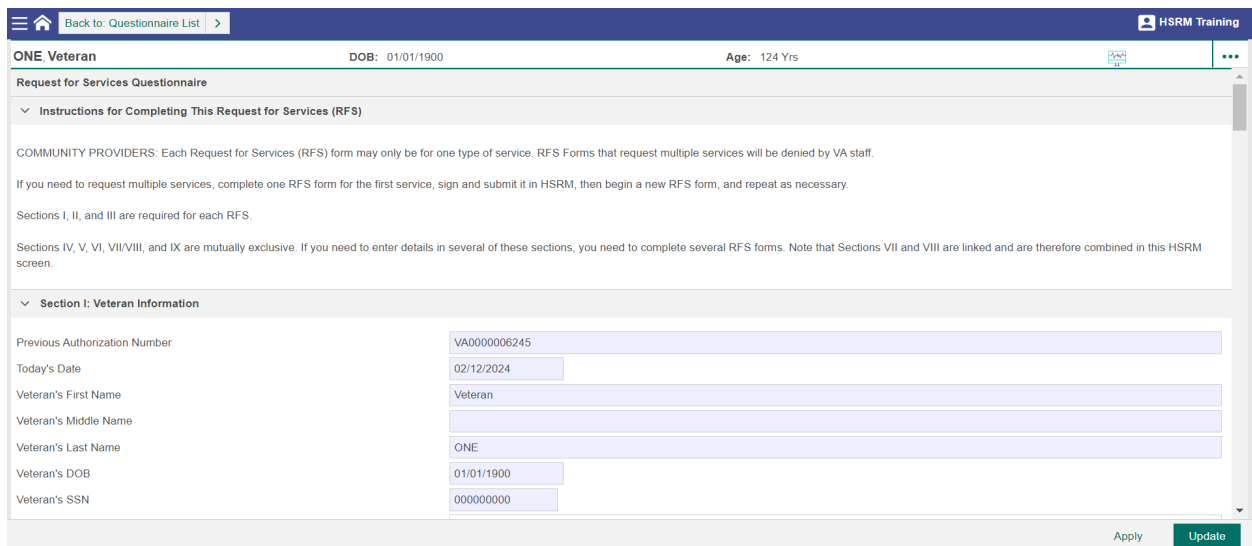


Figure 49: Questionnaire List Screen



5. Complete all required fields and details of the request.

Figure 50: Requests for Services Questionnaire



6. Select the checkbox for the **Requesting Provider Signature** (Community Care Provider security group user only).
  - a. If the RFS is completed by a Community Staff user, the form must be routed via the drop-down option to a Community Care Provider user for signature before submission to VA.
7. Select **Sent to VA** from the **Request Status** drop-down list and submit your request by selecting the **Apply**  or **Update** button .



Figure 51: Requesting Provider Signature and Request Status

**ONE Veteran**      **DOB:** 01/01/1900      **Age:** 124 Yrs

I do hereby acknowledge that VA reserves the right to perform the requested service(s) if the following criteria are met: (1) The patient agrees to receive services from VA (2) Service(s) are available at VA facility and are able to be provided by the clinically indicated date (3) It is determined to be within the patient's best interest. Upon completion of the requested service(s), VA will provide all resulting medical documentation to the ordering provider. If all criteria listed are not true and VA agrees the service(s) are clinically indicated, VA will provide a referral for services to be performed in the community. I do hereby attest that upon receipt of order/consult results, I will assume responsibility for reviewing said results, addressing significant findings, and providing continued care.

\* Requesting Provider Signature

\* Today's Date 02/12/2024

DOCUMENTATION INSTRUCTIONS: To upload supporting documentation for this Request for Services, save this form, return to the Referral Details screen of the veteran's current Referral, select the Add/View Documents link, then upload the documentation via the Documents screen.

Request Status	Description	Code
> Adjudication	Draft	1
> Administrative and Audit Details	Sent to Community Care Provider for Signature	2
	Sent to VA	3
	Cancelled	6
	Pending – Additional Medical Documentation Required	7
	Pending – Other Information Required from Provider	8

Apply Update

- » *Note: When VA has adjudicated the request, you will receive a Review Adjudicated RFS task on the Task List.*
- » *Note: If a Community Staff user completes the RFS form and sends it to the Community Care Provider for signature, a Sign and Submit Request for Services task will appear on the Task List.*

## 4.12 Community Provider Precertification

There may be occasions when a referral requires VA to call TPPs for precertification for patients who are VHA beneficiaries with other billable health insurance (OHI).

### 4.12.1 Identify Referrals Requiring OHI Precertification

If a referral requires OHI precertification, it will have either **PRCT REV** or **PRCT** listed in the SEOC name.

1. To view precertification details, select the row of the referral.

Figure 52: Referral Screen – SEOC

Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Pulmonary Function Testing SEOC 1.4.3	Routine		10/25/2022	VA0000006243	PULMONARY	First Appointment Made	VACCN TEST Facility	10/27/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Orthopedics General_PRCT SEOC 1.0.13	Routine		10/25/2022	VA0000006239	ORTHOPEDIC	First Appointment Made	VACCN TEST Facility	12/01/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Cath - PCI SEOC 1.1.11 PRCT REV	Routine		10/25/2022	VA0000006235	CARDIOLOGY	First Appointment Made	VACCN TEST Facility	11/15/2022
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Cardiology Comprehensive_PRCT SEOC 1.4.13	Routine		10/25/2022	VA0000006242	CARDIOLOGY	Sent	VACCN TEST Facility	
Togus VA Medical Center	ONE	Veteran	01/01/1900	000000000	Acupuncture Chronic Care Management SEOC 1.1.9	Routine		10/25/2022	VA0000006241	COMPLEMENTARY AND INTEGRATIVE HEALTH	Sent	VACCN TEST Facility	



#### 4.12.2 View Precertification Instructions

Once on the **Referral Details** screen, community providers can view the precertification information on:

The **Service/s Requested** section, titled Precertification.

The **Offline Referral Form** under the Precertification section. Select the **Component Menu** (vertical ellipsis located top right of the screen), and, under **Print**, select **Offline Referral Form**.

The **Billing and Other Referral Information** sheet is under the Precertification section. Select the **Component Menu**, then select **Billing and Other Referral Information** under **Print**.

Figure 53: Referral Details – Precertification Instructions

The screenshot displays the 'Referral Details' screen for a veteran. At the top, it shows 'ONE Veteran', 'DOB: 01/01/1900', and 'Age: 123 Yrs'. The 'Referral Details' section includes fields for 'Referring Facility' (Togus VA Medical Center), 'Referring Facility Phone' (877-881-7618 or 207-623-8411 ext. 6121 Option 5), 'Referring Facility Fax' (207-626-4780), 'Referring Provider' (NPI: [redacted]), 'Priority' (Routine), 'Provisional Diagnosis' (M223X2 Other derangements of patella, left), 'Referral Date' (10/25/2022), 'Clinically Indicated Date' (10/31/2022), 'Referral Expiration Date' (05/30/2023), and 'Level of Care Coordination' (Moderate). There is an 'Add/View Documents' link and a 'Veteran's Medical Record' link. The 'Service/s Requested' section shows 'Category of Care' (ORTHOPEDIC) and '\* Service Requested' (Orthopedics General\_PRCT SEOC 1.0.13) with a 'SEOC Details' link. A note states: 'This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above. For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen. If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.' A red box highlights a paragraph of text: 'Precertification: The Department of Veterans Affairs (VA) is required by law to obtain precertification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer precertification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has OHI, so that VA can notify the Third Party Payer. Notification details and specific care requiring precertification for this SEOC can be found at: https://www.va.gov/COMMUNITYCARE/providers/PRCT\_requirements.asp'. At the bottom right, there are 'Apply' and 'Update' buttons.

» *Note: The Precertification section instructs community providers to navigate to the [Community Care website](#) for further notification details. You can either copy and paste the text link into your web browser, or, if available, directly select the link to open the page.*

#### 4.12.3 View Community Care Precertification Web Page

Once on the Community Care precertification web page, please read the precertification notification instructions.

1. To identify if a specific service requires precertification, scroll down to Standardized Episodes of Care (SEOC) Billing Code Information, and select the link titled **License for Use of Current Procedural Terminology**.





Figure 54: Community Care Precertification Requirements Web Page

**Community Care Home**

- Veteran Care
- Family Member Care
- For Caregivers
- For Providers
- For Players
- Publications
- About VHA OCC
- Site Map
- More Health Care

**Community Care Home**

**Precertification Requirements**

The VA is required by law to bill Third Party Payers (TPP) for care that is not related to a Veteran's service-connected disability or Special Authority. This requires VA to call TPPs for precertification for patients who are VHA beneficiaries with other billable health insurance (OHI). Please note that claims for ancillary services will be processed in accordance with Medicare National Correct Coding Initiative(NCCI), Medically Unlikely Edit (MUE), and related edits.

**Third Party Payer Precertification Form** | **VA Billing Codes Information**

The preferred method for submitting requests is via the HealthShare Referral Management (HSRM) provider portal using the Task: CCN PRECERTIFICATION NOTIFICATION. Although this is the preferred method of notifying Reverse Operations of precertification, the request can also be submitted via fax.

Once the community care provider has notified VHA Reverse Operations that the test/procedure/admission requiring TPP precertification is scheduled, there is no requirement to wait for the TPP approval or response prior to performing the test/procedure/admission included as part of the SEOC referral.

If you are interested in more information about HealthShare Referral Manager, please review our Care Coordination page. To sign up for the HSRM Provider Portal, please select the **Community Care Referral and Authorization (CCRA)** option from the AccessVA website.

**Care Coordination-HSRM Information** | **HSRM Provider Portal AccessVA website**

Fax numbers by Consolidated Patient Account Center (CPAC) Region are listed below:

CPAC / Fax number	VSNs included
Northwest CPAC (717) 275-3002	VSN 1: Togus, ME; Manchester, NH; Central Western Massachusetts, Bedford, MA; Boston, MA; Providence, RI; White River Jct, VT; Connecticut
VSN 2: Western New York; East Orange, NJ; Bronx, NY; New York, NY	

**Standardized Episodes of Care (SEOC) Billing Code Information**

The VA SEOC Billing Code List provides preapproved billing codes associated to the services with each available SEOC. The list also contains billing codes that require TPP precertification, called "Precertification (Prctert) Codes." While the codes have been clinically approved in the referral by the VA as part of the SEOC, an additional precertification request must be submitted by VHA Reverse Operations to the Veteran's TPP for the prctert codes.

**License for Use of Current Procedural Terminology**

**Additional Coding Information**

**Ancillary Codes:** Please note that claims for ancillary services will be processed in accordance with OMS NCCI, MUE, and related edits.

If codes are not on SEOC, Services provided must be appropriate and necessary to accomplish the intent of the referring providers order/request. The Standardized Episode of Care (SEOC) describes the most likely scope of care necessary, but other services may be allowed in certain circumstances if necessary for completing the referral.

2. Select **Accept** on the bottom of the **Community Care End User Agreement Web Page**. Selecting **Accept** will download the SEOC precertification code list to your computer.

Figure 55: Community Care End User Agreement Web Page – Accept

**Community Care Home**

- Veteran Care
- Family Member Care
- For Caregivers
- For Providers
- For Players
- Publications
- About VHA OCC
- Site Map
- More Health Care

**Community Care Home**

**End User Agreement**

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**American Medical Association CPT application**

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Should the foregoing terms and conditions be acceptable to you, please indicate your agreement and acceptance by clicking below on the button labeled "ACCEPT."

**ACCEPT** | **DO NOT ACCEPT**

#### 4.12.4 View SEOC Billing Codes for Precertification

Once you open the file titled "SEOC-PRCT\_Code\_List.xlsx" from your downloads, you will be able identify which billing codes require precertification. Any billing codes in the **PRCT Billing Codes** column in red require precertification.

To locate a specific SEOC or billing code:



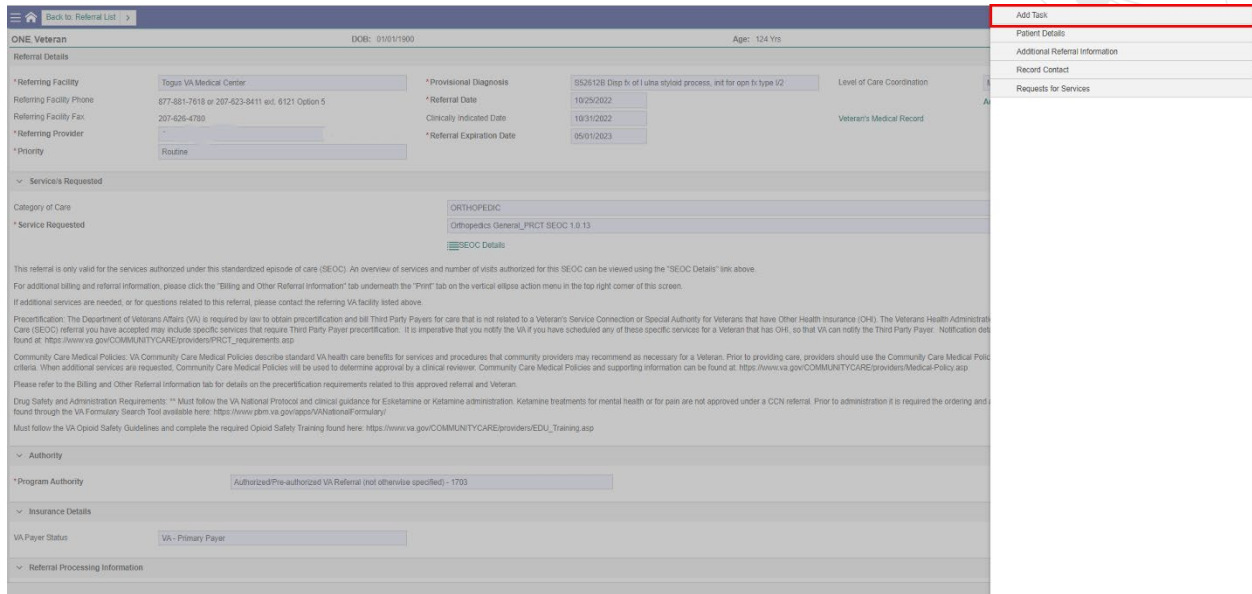
1. Use the CTRL+F keyboard shortcut to pull up the search option in Excel.
2. Enter either the specific SEOC name or billing code to locate it in the document.

» *Note: If a service requires precertification, you will need to create a manual task in HSRM for the Revenue team.*

Figure 56: SEOC Precertification Excel Document

A	B	C	D
SEOC Name	SEOC Billing Codes <i>(Please note: Due to size, some SEOCs will be continued on the subsequent line. Example: General Surgery and General Surgery continued.)</i>	PRCT Billing Codes <i>PRCT Billing codes in column C (red and underlined) DO REQUIRE precert notification.</i>	Effective Date
1 Acupuncture-Chronic Care Management	20560, 20561, 97016, 97026, 97039, 97110, 97112, 97124, 97139, 97140, 97530, 97810, 97811, 97813, 97814, 99211, 99212, 99213, 99214, 99215, 99216, 99217, 99218, 99219, 99220, 99221, 99222, 99223, 99224, 99225, 99226, 99231, 99232, 99233, 99234, 99235, 99236, 99238, 99239, 99354, 99355, 99356, 99357	N/A	10/1/2021
3 Acupuncture-Continuation of Initial Care	20560, 20561, 97016, 97026, 97039, 97110, 97112, 97124, 97139, 97140, 97530, 97810, 97811, 97813, 97814, 99211, 99212, 99213, 99214, 99215, 99216, 99217, 99218, 99219, 99220, 99221, 99222, 99223, 99224, 99225, 99226, 99231, 99232, 99233, 99234, 99235, 99236, 99238, 99239, 99354, 99355, 99356, 99357	N/A	10/1/2021
4 Acute Inpatient Psychiatric Involuntary	00104, 90870, 99217, 99218, 99219, 99220, 99221, 99222, 99223, 99224, 99225, 99226, 99231, 99232, 99233, 99234, 99235, 99236, 99238, 99239, 99354, 99355, 99356, 99357	N/A	10/1/2021
5 Acute Inpatient Psychiatric Voluntary	00104, 90870, 99217, 99218, 99219, 99220, 99221, 99222, 99223, 99224, 99225, 99226, 99231, 99232, 99233, 99234, 99235, 99236, 99238, 99239, 99354, 99355, 99356, 99357	N/A	10/1/2021
6 Acute Inpatient Rehabilitation	99221, 99222, 99223, 99224, 99225, 99226, 99231, 99232, 99233, 99234, 99235, 99236, 99238, 99239, 99356, 99357	90791	7/16/2021
7 Acute Outpatient Center Based Assisted Hemodialysis	36415, 36416, 36591, 36592, 36593, 80047, 80048, 80050, 80051, 80053, 80061, 80069, 80076, 80202, 80329, 80330, 80331, 80414, 80415, 81000, 81001, 81002, 81003, 81005, 81007, 81015, 81020, 81025, 81050, 82040, 82042, 82043, 82044, 82045, 82310, 82330, 82340, 82507, 82550, 82803, 82805, 82810, 82945, 82947, 83020, 83036, 83090, 83874, 83880, 84100, 84132, 84133, 84484, 84520, 84525, 84540, 84545, 84702, 84703, 84704, 85007, 85018, 85025, 85027, 85046, 85610, 85611, 85730, 86140, 86147, 86328, 86769, 86900, 87040, 87070, 87075, 87077, 87186, 87205, 88300, 83302, 88304, 88305, 88307, 88309, 88311, 88312, 90945, 90997, 93000, 93784, 96360, 96361, 96365, 96366, 96367, 96372, 96373, 96374, 96375, 99071, G0421, G2023, G2024	36800, 90935, 90937, 90940, 90947, G0420, G0491, G0492	7/16/2021
8 Addiction Medicine Outpatient	36415, 36416, 80047, 80048, 80051, 80061, 80076, 80305, 80306, 80307, 80320, 80321, 80322, 80323, 80324, 80325, 80326, 80327, 80328, 80345, 80346, 80347, 80348, 80349, 80350, 80351, 80352, 80353, 80354, 80356, 80357, 80358, 80359, 80360, 80361, 80362, 80363, 80364, 80365, 80367, 80371, 80373, 80374, 80375, 80376, 80377, 80414, 80415, 81000, 81001, 81002, 81003, 81005, 81007, 81015, 81020, 81025, 81050, 82075, 82306, 82550, 82607, 82652, 82746, 82747, 82803, 82805, 82810, 82945, 82947, 83036, 83090, 83874, 83880, 83992, 84484, 84630, 84702, 84703, 84704, 85007, 85018, 85025, 85027, 85046, 85610, 85611, 85730, 86140, 86141, 86147, 86328, 86618, 86769, 86900, 87070, 87075, 87077, 87186, 87205, 88300, 88302, 88304, 88305, 88307, 88309, 88311, 88312, 90785, 90792, 90832, 90833, 90834, 90836, 90837, 90838, 90839, 90840, 90845, 90846, 90847, 90849, 90853, 90880, 90887, 90889, 96127, 96130, 96131, 96146, 96156, 96158, 96159, 96372, 97151, 97152, 97153, 97154, 97155, 97156, 97157, 97158, 99078, 99202, 99203, 99204, 99205, 99211, 99212, 99213, 99214, 99215, 99354, 99355, 99406, 99407, 99484, 99489, 99493, 99494, 03627, 03737, G0176, G0177, G0396, G0397, G0409, G0410, G0411, G0442, G0443, G0463, G0466, G0467, G0468, G0480, G0481, G0482, G0483, G2023, G2024	82670, 83735, 90791, 90865, 96116, 96121, 96125, 96132, 96133, 96136, 96137, 96138, 96139, G0469, G0470	10/1/2021
9 ALASKA USE ONLY HIS THP	99202, 99203, 99204, 99205, 99211, 99212, 99213, 99214, 99215	N/A	1/4/2021
	36415, 36416, 70210, 70220, 70450, 70460, 71045, 71046, 71047, 71048, 74176, 74177, 74178, 80047, 80048, 80051, 80053, 80061, 80069, 80074, 80076, 80195, 80202, 80305, 80306, 80307, 80414, 80415, 81000, 81001, 81002, 81003, 81005, 81007, 81015, 81020, 81025, 81050, 82040, 82043, 82103, 82247, 82248, 82306, 82384, 82542, 82550, 82565, 82570, 82607, 82652, 82728, 82746, 82784, 82785, 82787, 82803, 82805, 82810, 82945, 82947, 82955, 82962, 83036, 83090, 83497, 83516, 83540, 83550, 83615, 83704, 83789, 83835, 83874, 83880, 83883, 84081, 84100, 84110, 84120, 84150, 84155, 84156, 84160, 84165, 84166, 84181, 84182, 84255, 84260, 84295, 84307, 84311, 84402, 84403, 84432, 84436, 84439, 84443, 84450, 84460, 84466, 84479, 84481, 84484, 84520, 84550, 84703, 84704, 85007, 85018, 85025, 85027, 85046, 85060, 85097, 85220, 85240, 85301, 85302, 85305, 85379, 85200, 85598, 85610, 85611, 85613, 85651, 85652, 85730, 86001, 86003, 86005, 86008, 86021, 86038, 86039, 86060, 86140, 86141, 86146, 86147, 86148, 86152, 86153, 86160, 86161, 86162, 86200, 86225, 86235, 86255, 86256, 86316, 86317, 86320, 86325, 86327, 86328, 86329, 86331, 86332, 86334, 86335, 86337, 86340, 86341, 86343, 86344, 86352, 86353, 86355, 86356, 86357, 86359, 86360, 86361, 86376, 86430, 86431, 86480, 86481, 86485, 86486, 86490, 86510, 86580, 86602, 86603, 86606, 86609, 86612, 86618, 86635, 86638, 86641, 86644, 86645, 86648, 86682, 86684, 86687, 86688, 86698, 86704, 86705, 86706, 86707, 86708, 86709, 86710, 86711, 86712, 86713, 86714, 86715, 86716, 86717, 86718, 86719, 86720, 86721, 86722, 86723, 86724, 86725, 86726, 86727, 86728, 86729, 86730, 86731, 86732, 86733, 86734, 86735, 86736, 86737, 86738, 86739, 86740, 86741, 86742, 86743, 86744, 86745, 86746, 86747, 86748, 86749, 86750, 86751, 86752, 86753, 86754, 86755, 86756, 86757, 86758, 86759, 86760, 86761, 86762, 86763, 86764, 86765, 86766, 86767, 86768, 86769, 86770, 86771, 86772, 86773, 86774, 86775, 86776, 86777, 86778, 86779, 86780, 86781, 86782, 86783, 86784, 86785, 86786, 86787, 86788, 86789, 86790, 86791, 86792, 86793, 86794, 86795, 86796, 86797, 86798, 86799, 86800, 86801, 86802, 86803, 86804, 86805, 86806, 86807, 86808, 86809, 86810, 86811, 86812, 86813, 86814, 86815, 86816, 86817, 86818, 86819, 86820, 86821, 86822, 86823, 86824, 86825, 86826, 86827, 86828, 86829, 86830, 86831, 86832, 86833, 86834, 86835, 86836, 86837, 86838, 86839, 86840, 86841, 86842, 86843, 86844, 86845, 86846, 86847, 86848, 86849, 86850, 86851, 86852, 86853, 86854, 86855, 86856, 86857, 86858, 86859, 86860, 86861, 86862, 86863, 86864, 86865, 86866, 86867, 86868, 86869, 86870, 86871, 86872, 86873, 86874, 86875, 86876, 86877, 86878, 86879, 86880, 86881, 86882, 86883, 86884, 86885, 86886, 86887, 86888, 86889, 86890, 86891, 86892, 86893, 86894, 86895, 86896, 86897, 86898, 86899, 86900, 86901, 86902, 86903, 86904, 86905, 86906, 86907, 86908, 86909, 86910, 86911, 86912, 86913, 86914, 86915, 86916, 86917, 86918, 86919, 86920, 86921, 86922, 86923, 86924, 86925, 86926, 86927, 86928, 86929, 86930, 86931, 86932, 86933, 86934, 86935, 86936, 86937, 86938, 86939, 86940, 86941, 86942, 86943, 86944, 86945, 86946, 86947, 86948, 86949, 86950, 86951, 86952, 86953, 86954, 86955, 86956, 86957, 86958, 86959, 86960, 86961, 86962, 86963, 86964, 86965, 86966, 86967, 86968, 86969, 86970, 86971, 86972, 86973, 86974, 86975, 86976, 86977, 86978, 86979, 86980, 86981, 86982, 86983, 86984, 86985, 86986, 86987, 86988, 86989, 86990, 86991, 86992, 86993, 86994, 86995, 86996, 86997, 86998, 86999, 87000, 87001, 87002, 87003, 87004, 87005, 87006, 87007, 87008, 87009, 87010, 87011, 87012, 87013, 87014, 87015, 87016, 87017, 87018, 87019, 87020, 87021, 87022, 87023, 87024, 87025, 87026, 87027, 87028, 87029, 87030, 87031, 87032, 87033, 87034, 87035, 87036, 87037, 87038, 87039, 87040, 87041, 87042, 87043, 87044, 87045, 87046, 87047, 87048, 87049, 87050, 87051, 87052, 87053, 87054, 87055, 87056, 87057, 87058, 87059, 87060, 87061, 87062, 87063, 87064, 87065, 87066, 87067, 87068, 87069, 87070, 87071, 87072, 87073, 87074, 87075, 87076, 87077, 87078, 87079, 87080, 87081, 87082, 87083, 87084, 87085, 87086, 87087, 87088, 87089, 87090, 87091, 87092, 87093, 87094, 87095, 87096, 87097, 87098, 87099, 87100, 87101, 87102, 87103, 87104, 87105, 87106, 87107, 87108, 87109, 87110, 87111, 87112, 87113, 87114, 87115, 87116, 87117, 87118, 87119, 87120, 87121, 87122, 87123, 87124, 87125, 87126, 87127, 87128, 87129, 87130, 87131, 87132, 87133, 87134, 87135, 87136, 87137, 87138, 87139, 87140, 87141, 87142, 87143, 87144, 87145, 87146, 87147, 87148, 87149, 87150, 87151, 87152, 87153, 87154, 87155, 87156, 87157, 87158, 87159, 87160, 87161, 87162, 87163, 87164, 87165, 87166, 87167, 87168, 87169, 87170, 87171, 87172, 87173, 87174, 87175, 87176, 87177, 87178, 87179, 87180, 87181, 87182, 87183, 87184, 87185, 87186, 87187, 87188, 87189, 87190, 87191, 87192, 87193, 87194, 87195, 87196, 87197, 87198, 87199, 87200, 87201, 87202, 87203, 87204, 87205, 87206, 87207, 87208, 87209, 87210, 87211, 87212, 87213, 87214, 87215, 87216, 87217, 87218, 87219, 87220, 87221, 87222, 87223, 87224, 87225, 87226, 87227, 87228, 87229, 87230, 87231, 87232, 87233, 87234, 87235, 87236, 87237, 87238, 87239, 87240, 87241, 87242, 87243, 87244, 87245, 87246, 87247, 87248, 87249, 87250, 87251, 87252, 87253, 87254, 87255, 87256, 87257, 87258, 87259, 87260, 87261, 87262, 87263, 87264, 87265, 87266, 87267, 87268, 87269, 87270, 87271, 87272, 87273, 87274, 87275, 87276, 87277, 87278, 87279, 87280, 87281, 87282, 87283, 87284, 87285, 87286, 87287, 87288, 87289, 87290, 87291, 87292, 87293, 87294, 87295, 87296, 87297, 87298, 87299, 87300, 87301, 87302, 87303, 87304, 87305, 87306, 87307, 87308, 87309, 87310, 87311, 87312, 87313, 87314, 87315, 87316, 87317, 87318, 87319, 87320, 87321, 87322, 87323, 87324, 87325, 87326, 87327, 87328, 87329, 87330, 87331, 87332, 87333, 87334, 87335, 87336, 87337, 87338, 87339, 87340, 87341, 87342, 87343, 87344, 87345, 87346, 87347, 87348, 87349, 87350, 87351, 87352, 87353, 87354, 87355, 87356, 87357, 87358, 87359, 87360, 87361, 87362, 87363, 87364, 87365, 87366, 87367, 87368, 87369, 87370, 87371, 87372, 87373, 87374, 87375, 87376, 87377, 87378, 87379, 87380, 87381, 87382, 87383, 87384, 87385, 87386, 87387, 87388, 87389, 87390, 87391, 87392, 87393, 87394, 87395, 87396, 87397, 87398, 87399, 87400, 87401, 87402, 87403, 87404, 87405, 87406, 87407, 87408, 87409, 87410, 87411, 87412, 87413, 87414, 87415, 87416, 87417, 87418, 87419, 87420, 87421, 87422, 87423, 87424, 87425, 87426, 87427, 87428, 87429, 87430, 87431, 87432, 87433, 87434, 87435, 87436, 87437, 87438, 87439, 87440, 87441, 87442, 87443, 87444, 87445, 87446, 87447, 87448, 87449, 87450, 87451, 87452, 87453, 87454, 87455, 87456, 87457, 87458, 87459, 87460, 87461, 87462, 87463, 87464, 87465, 87466, 87467, 87468, 87469, 87470, 87471, 87472, 87473, 87474, 87475, 87476, 87477, 87478, 87479, 87480, 87481, 87482, 87483, 87484, 87485, 87486, 87487, 87488, 87489, 87490, 87491, 87492, 87493, 87494, 87495, 87496, 87497, 87498, 87499, 87500, 87501, 87502, 87503, 87504, 87505, 87506, 87507, 87508, 87509, 87510, 87511, 87512, 87513, 87514, 87515, 87516, 87517, 87518, 87519, 87520, 87521, 87522, 87523, 87524, 87525, 87526, 87527, 87528, 87529, 87530, 87531, 87532, 87533, 87534, 87535, 87536, 87537, 87538, 87539, 87540, 87541, 87542, 87543, 87544, 87545, 87546, 87547, 87548, 87549, 87550, 87551, 87552, 87553, 87554, 87555, 87556, 87557, 87558, 87559, 87560, 87561, 87562, 87563, 87564, 87565, 87566, 87567, 87568, 87569, 87570, 87571, 87572, 87573, 87574, 87575, 87576, 87577, 87578, 87579, 87580, 87581, 87582, 87583, 87584, 87585, 87586, 87587, 87588, 87589, 87590, 87591, 87592, 87593, 87594, 87595, 87596, 87597, 87598, 87599, 87600, 87601, 87602, 87603, 87604, 87605, 87606, 87607, 87608, 87609, 87610, 87611, 87612, 87613, 87614, 87615, 87616, 87617, 87618, 87619, 87620, 87621, 87622, 87623, 87624, 87625, 87626, 87627, 87628, 87629, 87630, 87631, 87632, 87633, 87634, 87635, 87636, 87637, 87638, 87639, 87640, 87641, 87642, 87643, 87644, 87645, 87646, 87647, 87648, 87649, 87650, 87651, 87652, 87653, 87654, 87655, 87656, 87657, 87658, 87659, 87660, 87661, 87662, 87663, 87664, 87665, 87666, 87667, 87668, 87669, 87670, 87671, 87672, 87673, 87674, 87675, 87676, 87677, 87678, 87679, 87680, 87681, 87682, 87683, 87684, 87685, 87686, 87687, 87688		

Figure 57: Action Menu – Add Task



2. On the **Task Edit** screen, you can add a manual task for another user, a group of users, or yourself. Below are the different fields on the **Task Edit** screen:

- Task Item** – This is a mandatory field and needs to be selected from a list, as noted by the magnifying glass. Since this is a task for the Revenue team, select **Provider Precert Notification**.
- Priority** – This is another mandatory field that has a list. It is already filled in as **Basic**.
- Status** – The status is preset to **Pending** since this is a new task. It is mandatory as well.
- Assign Group** – Because this is a task for HSRM Revenue staff, you need to assign the task to the **Revenue Utilization Review (RUR) Nurse** group.

3. Add comments to specify for which service and billing code number you are requesting the precertification, appointment date, diagnosis, and associated NPI number.
4. Save the changes. Remember, selecting **Update** saves the data and will only be available when all mandatory fields are complete.
5. Select **Update**.
6. VA Revenue staff members can now view the task. You may proceed with the service. There is no requirement to wait for VA or TPP approval or response prior to performing the test, procedure, or admission included as part of the SEOC referral.





Figure 58: Task Edit

The screenshot shows the 'Task Edit' interface. It features several input fields with search icons: 'Task Item' (Provider Precert Notification), 'Priority' (Basic), 'Status' (Pending), 'Assigned To User' (empty), 'Assigned To Group' (RUR Nurse), and 'Assigned Facility' (Togus VA Medical Center). There are also date pickers for 'Due Date' and 'Start Date', both set to 01/06/2022. A large text area for 'Comments' contains the text: 'Requesting precertification of dialysis treatment (CPT 90935) schedule for January 5, 2022 to treat a diagnosis of chronic kidney disease- DX code N18.6, NPI: 0000000000'. At the bottom right, there are 'Accept Task' and 'Update' buttons. The footer of the form reads 'HealthShare Referral Manager'.

» *Note: The Precertification section of the VA Community Care web page also includes a link to the Third-Party Payer Precertification Form. If necessary, community provider users can download, complete, and submit the form in HSRM. Be sure to assign the TPP Pre-Cert Form document type to the form on the Add Document page for the respective referral.*

### 4.13 Canned Text

Canned text automatically populates text fields with predefined text items. Selecting the **Canned Text** icon  (also called canned text graphic by screen readers) will display existing items in the canned text library. Users can create their own canned text to populate any text field that contains the **Canned Text** icon .

To create canned text:

1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Navigate to the Referral Processing Information section. In the Comments box, enter the text you wish to save, highlight it, and then select the Plus icon. This will take you to the Canned Text screen.
3. On the Canned Text screen, enter a code to assign to the text. Select the Update button at the bottom right to save the canned text.

### 4.14 Generating Reports

HSRM can generate reports that display the types of services referred to a specific community provider/facility, as well as the current status of the referrals sent during the selected period.

Figure 59: Report Types

Report Type	Description
Download Request for Services (RFS) Form	This paper RFS form may be uploaded into HSRM.
HSRM Reports Reference Guide	This report provides VA staff and community providers with the definitions and uses of all reports that they have access to.
Veteran Appointments Report	This report displays all the appointments at a specified VA or community provider facility. It allows VA staff, VA supervisors, and community providers to review the recent and upcoming Veteran appointments that are scheduled in HSRM. Report fields include Appointment Date, Appointment Status, Level of Care Coordination, and Referral Details.

To run a report:


1. Select the **Menu** icon  (also called link menu for screen readers), select **Reports**, and choose **Veteran Appointments Report**.

Figure 60: Menu - Veteran Appointments Report



» *Note: The HSRM Reports Reference Guide option, located in Reports, provides directions and detailed information about the report.*

2. Select the criteria needed to run the desired report from the fields available and select the **Preview** icon (also called “link graphic link opens Excel in a new window graphic preview” by screen readers) to run the report.



Figure 61: Veteran Appointments Report Parameters

The screenshot shows a web interface for the 'Veteran Appointments Report'. The header includes a home icon, the page title 'Veteran Appointments Report', the user 'HSR01 - QA - MR1', and a 'QA Team Account' profile icon. The main area is titled 'Report Parameters' and contains several search and date selection fields. A red box highlights a 'Preview' button at the bottom of the form.

3. Navigate to the report. Reports may be generated in PDF format or as Excel documents, and users can print and save them.

#### 4.15 Billing and Other Referral Information

The **Billing and Other Referral Information** sheet provides community providers with additional details related to the legal authority, claims submissions instructions, precertification requirements, and provision of prescriptions and durable medical equipment for the referral. Community providers can access this information sheet directly from the **Referral Details** screen. The information is also available on the **Offline Referral Form**. The information sheet will contain appropriate content based on the program authority. For example, a referral authorized as a Veterans Care Agreement, Community Care Network, or 1728 service-connected emergency care referral would contain content specific to that program.

To access the **Billing and Other Referral Information** sheet:


1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. From the **Referral Details** screen, select the **Component Menu** icon  (also called Referral List component menu button by screen readers), then select **Billing and Other Referral Information**.

Figure 62: Component Menu – Billing and Other Referral Information

The screenshot shows the HealthShare Referral Manager interface. At the top, it displays 'ONE, Veteran' with a DOB of 01/01/1900 and Age of 123 Yrs. The main content area is titled 'Referral Details' and contains several fields:
 

- \*Referring Facility: Togus VA Medical Center
- Referring Facility Phone: 877-881-7618 or 207-623-8411 ext. 6121 Option 5
- Referring Facility Fax: 207-626-4780
- \*Referring Provider: [Redacted]
- \*Priority: Routine
- \*Provisional Diagnosis: S82012Q.Displ osteochon fx l patella, 7f
- \*Referral Date: 09/06/2023
- Clinically Indicated Date: 09/11/2023
- \*Referral Expiration Date: 03/04/2024
- Service/s Requested: ORTHOPEDIC, Orthopedics General\_REV\_PRCT SEOC 1.0.15, SEOC Details

 On the right side, there is a 'Referral Details' dropdown menu with options: Print, Offline Referral Form, Billing and Other Referral Information (highlighted with a red box), Options, and Record Appointment. Below the form, there is a note: 'This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this... For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu... If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above. Precertification: The Department of Veterans Affairs (VA) is required by law to obtain precertification and bill Third Party Payers for care that is not related to a Veteran Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have...'

3. The **Billing and Other Referral Information** sheet appears, and users can print, download, and save it as a PDF.

Figure 63: Component Menu – Billing and Other Referral Information Sheet


The document is titled 'Billing and Other Referral Information' with the ID 'VA0000002306' and is 'Page 1 of 1'. It features the VA logo and the U.S. Department of Veterans Affairs logo. The text on the page is as follows:
 

- Referral Number:** VA0000002306
- Referring VA Facility:** Batavia VA Medical Center
- Submitting Claims**  
**ANY CLAIMS RELATED TO THIS EPISODE OF CARE MUST BE SUBMITTED TO OPTUM UNITEDHEALTH CARE AND INCLUDE THE APPROVED REFERRAL NUMBER.**
- Methods to submit claims:**  
**Electronic Data Interchange (EDI):**  
Payer ID for Medical and Dental – VACCN
- More information on how to submit claims can be found by visiting [https://www.va.gov/COMMUNITYCARE/revenue\\_ops/Veteran\\_Care\\_Claims.asp](https://www.va.gov/COMMUNITYCARE/revenue_ops/Veteran_Care_Claims.asp).
- Precertification**  
The Standardized Episode of Care (SEOC) referral you have accepted includes certain services that require Third PartyPayer (TPP) precertification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has Other Health Insurance (OHI), so that VA can notify the TPP. VHA is required by law to bill the TPP for care that is not for a Service Connection or Special Authority eligibility.



## 5 Clinical Viewer

The **Clinical Viewer** portal offers users a comprehensive view of a Veteran's medical documentation history in HSRM. Categories of information available in Clinical Viewer include a clinical summary of the patient's history, allergies, immunizations, any medications, lab results, procedures, and more. Clinical Viewer gives HSRM users a secure, centralized source of medical history and patient details for a Veteran in HSRM.

Clinical Viewer is accessible from the **Referral Details** screen for any Veteran that has relevant data in the system. To access Clinical Viewer from the **Referral Details** screen, users can either select the **Clinical Viewer** icon  on the **Patient Banner** or follow the **Veteran's Medical Record** link in the **Referral Details** section.

*Note: Clinical Viewer is unavailable for users in the Community View Only security group.*

To access Clinical Viewer:


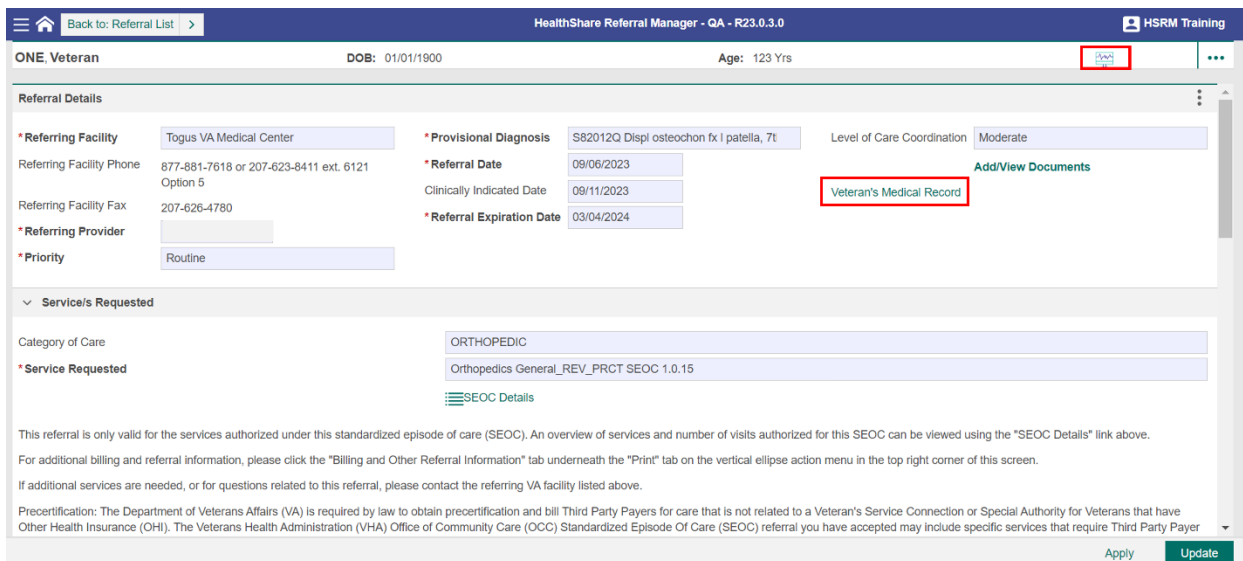
1. Locate the referral (refer to the [Locate a Referral](#) section of this guide).
2. Select the **Clinical Viewer** icon  on the Patient Banner or the **Veteran's Medical Record** link on the **Referral Details** screen.

Figure 64: Referral Details Screen

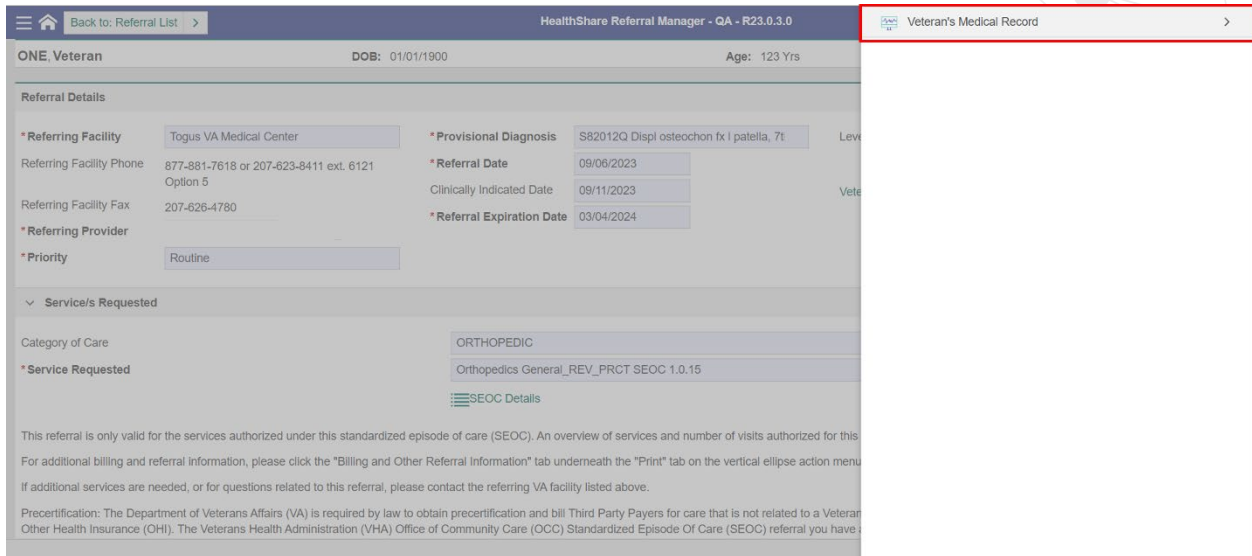


The screenshot shows the 'Referral Details' screen for a veteran. At the top, there is a navigation bar with 'Back to: Referral List' and 'HealthShare Referral Manager - QA - R23.0.3.0'. Below this, the veteran's name 'ONE, Veteran' and 'DOB: 01/01/1900' are displayed. The main content area is divided into several sections: 'Referring Facility' (Togus VA Medical Center), 'Referring Facility Phone' (877-881-7618 or 207-623-8411 ext. 6121 Option 5), 'Referring Facility Fax' (207-626-4780), 'Referring Provider', 'Priority' (Routine), 'Provisional Diagnosis' (S82012Q Displ osteochon fx l patella, 7t), 'Referral Date' (09/06/2023), 'Clinically Indicated Date' (09/11/2023), 'Referral Expiration Date' (03/04/2024), and 'Level of Care Coordination' (Moderate). A red box highlights the 'Veteran's Medical Record' link in the 'Referral Details' section. Below this, there is a section for 'Service/s Requested' with 'Category of Care' (ORTHOPEDIC) and '\*Service Requested' (Orthopedics General\_REV\_PRCT SEOC 1.0.15). At the bottom, there are 'Apply' and 'Update' buttons.

3. If the user selects the **Clinical Viewer** icon, a menu will open. Select the **Veteran's Medical Record** option. Alternatively, if the user selects the **Veteran's Medical Record** link in the Referral Details portion of the screen, it will bypass the menu and take them directly to Clinical Viewer.

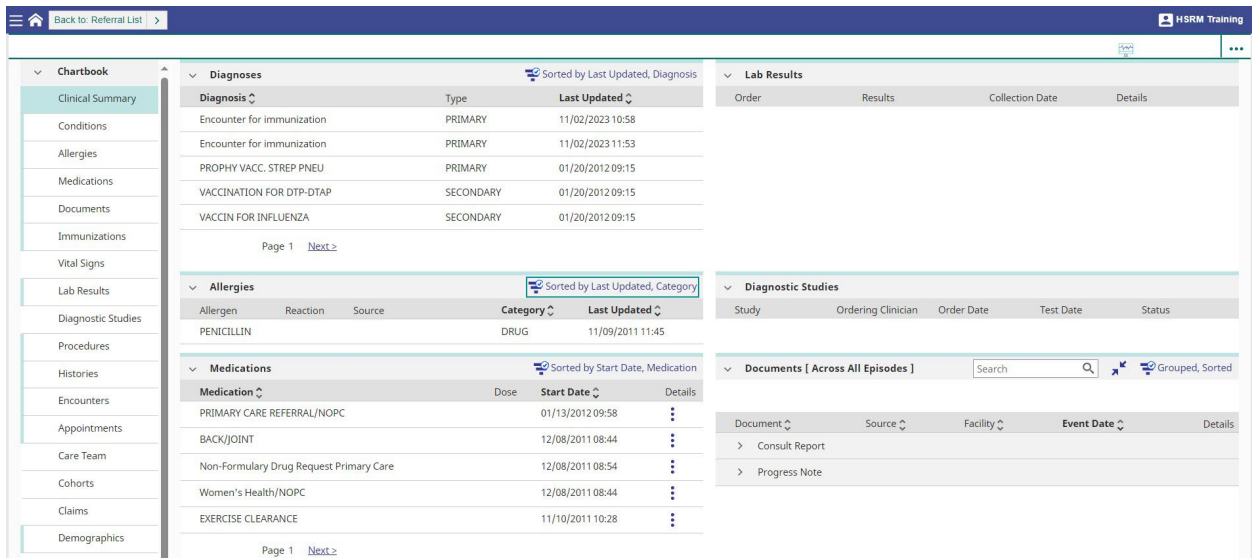


Figure 65: Clinical Viewer Access Menu



- The Clinical Viewer page will open, displaying patient medical history in HSRM. The categories of information available for viewing are in a list called the **Chartbook**. Select one of the categories in the Chartbook to view it.

Figure 66: Clinical Viewer Home Screen



» *Note: All information in Clinical Viewer is read-only, so users will not be able to print or download any information or documentation. Attempting to save images or data from Clinical Viewer may present security risks. Users must remove any saved data or images from their device after use.*



## 6 Additional Resources

Contact the HSRM Help Desk for support. Open a ticket by phone at (844) 293-2272 or email [hsrmsupport@va.gov](mailto:hsrmsupport@va.gov).

Additionally, the following websites provide quick and easy access to commonly needed materials:

- » [VA Community Care Website](#)
- » [HSRM Support Points of Contact List](#)
- » [Community Provider Information Sheet](#)



## Appendix A: Acronyms and Abbreviations

Table 1: Acronyms and Abbreviations

Acronym or Abbreviation	Definition
Admin	Administrator
C6	Community Care Clinical Coordination Contact Center
CBOC	Community-Based Outpatient Clinic
CCN	Community Care Network
EDIPI	Electronic Data Interchange Personal Identifier
EOC	Episode of Care
HIE	Health Information Exchange
HSRM	HealthShare Referral Manager
ICN	Integration Control Number
IT	Information Technology
NPI	National Provider Identifier
OHI	Other Health Insurance
OS	Operating System
PDF	Portable Document Format
PII	Personally Identifiable Information
PPMS	Provider Profile Management System
RFS	Request for Services
RUR	Revenue Utilization Review
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
TPA	Third-Party Administrator
TPP	Third-Party Payer
TRAIN	Training Finder Real-time Affiliate Integrated Network
VA	U.S. Department of Veterans Affairs
VAMC	Veterans Affairs Medical Center
VHA	Veterans Health Administration
VISN	Veterans Integrated Service Network



## Appendix B: Revision History Table

Table 2: Revision History Table

Version	Date	Author	Description
0.1	Nov. 2018	CCRA Training Team	Initial Draft
0.2	Nov. 2018	Sam Weaver	QC Review
0.3	Nov. 2018	Jennifer Cote	JPM/PQAL Review
0.4	Nov. 2018	Susan Burke	PM Review
0.5	01/14/2019	Sam Weaver	Template Update
0.6	01/14/2019	Jennifer Cote	JPM/PQAL Review
1.0	01/14/2019	Susan Burke	PM Review
1.1	03/25/2019	Allyson Newman	<p>Updates from 4.0</p> <p>New screenshots throughout</p> <p>Alt Text added</p> <p>Updated TOC</p> <p>Updated Table of Figures</p> <p>Updated Table of Tables</p> <p>Text updates throughout</p> <p>Added Section 3.1.2: Billing and Other Referral Information</p> <p>Added screenshot of Component Menu with Billing and Other Referral Information option highlighted</p> <p>Added screenshot of Billing and Other Information Sheet</p> <p>Updated HSRM Help Desk phone number and TTY number</p>
1.2	03/27/2019	Kathryn Hooker	<p>QC Review</p> <p>Title page: Changed date to April 2019 and Version to 2.0; removed HSRM acronym</p> <p>Footer: Changed to Arial font</p> <p>Intro: Updated to mandatory version</p> <p>Appendix A: Added acronyms</p> <p>Throughout doc:</p> <ul style="list-style-type: none"> <li>• Edited alt text for brevity</li> <li>• Made minor changes to grammar and punctuation</li> </ul>
1.3	05/08/2019	Jennifer Cote	JPM/PQAL Review



Version	Date	Author	Description
1.4	06/13/2019	Allyson Newman	Updates for Build 6.0 New screenshots throughout Expanded Requests for Services section with screenshots Updated TOC Update Table of Figures Updated Table of Tables Text updates throughout Minor punctuation Added a report
1.5	06/17/2019	Rachael Levine	Training Team Lead Review
1.6	06/17/2019	Allyson Newman	Updates to screenshots, text. Added Alt text
1.7	06/17/2019	Jennifer Cote	JPM/PQAL Review
2.0	06/17/2019	Susan Burke	Program Manager Review
2.1	06/21/2019	Allyson Newman	Added PPMS Provider Search
2.2	06/24/2019	Kathryn Hooker	QC review of updates
2.3	06/24/2019	Jennifer Cote	JPM/PQAL Review
3.0	08/13/2019	Allyson Newman	Updates for Build 7.0 New screenshots throughout Text updates throughout Updated TOC Updated Table of Figures Updated Table of Tables Updated Resource links Updated footer with date Updated Getting Access to HSRM section Updated alt text
3.1	08/22/2019	Staci Shelley	QC Review
4.0	03/02/2020	Allyson Newman	Updates for Build 7.5 Updated footer Spelling and grammar revisions Removed Provider Search and Additional Details section Updated alt text Updated screenshots Updated Table of Contents Updated Table of figures



Version	Date	Author	Description
4.1	04/28/2020	Janay Hurley	Updates for Build 8.0 Updated Figure 5 Updated alt text for figure 5 Updated footer
4.2	04/29/2020	Jennifer Defreitas	Manager Review
4.3	04/29/2020	Kathryn Hooker	QC Review Updated intro text and Appendix A Verified links and alt text throughout
4.4	04/30/2020	Jennifer Cote	JPM/PQAL Review
5.0	05/01/2020	Susan Burke	Program Manager Review
5.1	05/26/2020	Sara Zarny	Updates for Release 9.0 Updated Figure 32 Updated alt text for Figure 32 Updated Figure 34 Updated alt text for Figure 34 Updated Figure 37 Updated alt text for Figure 37 Updated footer
5.2	05/29/2020	Janay Hurley	Training Team Lead Review
5.3	06/03/2020	Kathryn Hooker	QC review of updates
5.4	06/05/2020	Jennifer Cote	JPM/PQAL Review
6.0	06/07/2020	Susan Burke	Program Manager Review
6.1	07/30/2020	Allyson Newman	Updates for Release 10.0 Updated version number and date Updated footer Updated Figure 5 Updated Figure 9 Updated Figure 16 Updated Figure 17 Updated Figure 20 Updated Figure 32 Updated Figure 33 Updated Figure 35 Updated Figure 37 Updated Figure 39 Updated alt text throughout Updated Table of Contents Updated Table of Figures Updated Table of Tables
6.2	08/11/2020	Rammy Sbeitan	Final QA Review



Version	Date	Author	Description
6.3	08/17/2020	Allyson Newman	Updated Figure 9 Updated Figure 6 Updated Figure 12 Updated Figure 19 Updated Figure 22 Updated Figure 24
6.4	08/17/2020	Sara Zarny	Training QA Review
6.5	08/17/2020	Janay Hurley	Training Team Lead Review
6.6	08/17/2020	Kathryn Hooker	QC Review
6.7	08/20/2020	Jennifer Defreitas	Training Manager Review
6.8	08/21/2020	Jennifer Cote	JPM/PQAL Review
8.0	09/09/2020	Susan Burke	Program Manager Review
8.1	10/26/2020	Allyson Newman	Updates for Release 11.0 Replaced Figure 18 and added alt text Replaced Figure 19 and added alt text Updated text throughout Updated Table of Contents Updated Table of Figures Updated Table of Tables
8.2	11/04/2020	Kathryn Hooker	QC review of updates
8.3	11/16/2020	Jennifer Defreitas	Manager Review
8.4	11/17/2020	Jennifer Cote	JPM/PQAL Review
9.0	11/18/2020	Susan Burke	Program Manager Review
9.1	01/22/2021	Connor Reed	Technical Writer Review Updated title page to reflect Release 12.0 with no changes Updated footer to reflect version review and review date
9.2	03/10/2021	Jennifer Cote	JPM/PQAL Review
10.0	03/12/2021	Susan Burke	Program Manager Review
10.1	05/25/2021	Allyson Newman	Updates for Release 13.0 Updated text throughout Updated Figure 2 Updated Figure 3 Updated Figure 4 Updated Figure 5 Updated Figure 12 Updated Figure 38 Updated Figure 41 Updated Table 1



Version	Date	Author	Description
10.2	06/09/2021	Connor Reed	QA Review for Release 13 Updates Reviewed and updated all screenshots for PII/Privacy Updated Figure 10 Updated Figure 21 Updated Figure 22 Updated Figure 24 Updated language throughout Included note about C6 referrals Added Section 6: Clinical Viewer QA of updates 508 Compliance review
10.3	07/07/2021	Yasir Hashmi	Manager Review
10.4	07/12/2021	Kathryn Hooker	QC Review
10.5	07/16/2021	Jennifer Cote	JPM/PQAL Review
11.0	07/27/2021	Susan Burke	Program Director Review
11.1	08/02/2021	Connor Reed	Updated Clinical Viewer Figures 42, 43, 44
11.2	08/02/2021	Kathryn Hooker	QC Review
11.3	08/02/2021	Jennifer Cote	JPM/PQAL Review
12.0	08/02/2021	Susan Burke	Program Director Review
12.1	09/10/2021	Allyson Newman	Updates for Release 14.0 Updated text throughout Updated Figures 16, 17, 18, 19, 20, 31, 36, and 38 and updated alt text
12.2	09/13/2021	Connor Reed	QA of Release 14.0 Updates Inserted Figures 5 and 6 Updated Veteran Appointment Preference Language Inserted Section 4.1.3 Updated TOC and TOE
12.3	09/16/2021	Yasir Hashmi	Manager Review
12.4	09/20/2021	Lorelei Cox	Project Manager Review
12.5	09/20/2021	Kathryn Hooker	QC Review
12.6	09/23/2021	Jennifer Cote	JPM/PQAL Review
12.7	09/24/2021	Jennifer Parker	DPM Review
13.0	10/08/2021	Susan Burke	Program Director Review
13.1	12/08/2021	Allyson Newman	Initial review of updates needed for 15.0 Updated text and added comments





Version	Date	Author	Description
13.2	12/13/2021	Allyson Newman	Updates for Release 15.0 Updated Figures 2, 3, 20, and 21 Updated text throughout
13.3	12/16/2021	Connor Reed Allyson Newman	Updates for Release 15.0 Added section 13 about precertification process Updated Figure 4 Updated text
13.4	12/22/2021	Yasir Hashmi	Manager Review
13.5	12/27/2021	Lorelei Cox	Project Manager Review
13.6	12/28/2021	Kathryn Hooker	QC Review
13.7	12/29/2021	Jennifer Cote	JPM/PQAL Review
14.0	01/17/2022	Susan Burke	Program Director Review
14.1	03/03/2022	Allyson Newman	Initial review of updates for 16.0
14.2	03/03/2022	Allyson Newman	Updates for Release 16.0 Updated Figures 7 and 11
14.3	03/07/2022	Connor Reed	Updates for Release 16.0 Added the Find Referral by Patient Section
14.4	03/21/2022	Lorelei Cox	Project Manager Review
14.5	03/23/2022	Kathryn Hooker	QC review of updates
14.6	03/25/2022	Jennifer Cote	Project Manager – PMO Review
15.0	04/05/2022	Susan Burke	Program Director Review
15.1	05/13/2022	Allyson Newman	Initial review of updates for 17.0
15.2	05/16/2022	Allyson Newman	Updates for Release 17.0 Updated date and Release no. Updated Figures 14, 23, 24 Updated text throughout
15.3	05/27/2022	Connor Reed	QC of Release 17.0 updates, privacy edits, and 508 compliance validation
15.4	05/27/2022	Yasir Hashmi	Manager Review
15.5	05/31/2022	Lorelei Cox	Project Manager Review
15.6	06/02/2022	Kathryn Hooker	QC review of updates
15.7	06/03/2022	Jennifer Cote	Project Manager – PMO Review
16.0	06/22/2022	Susan Burke	Sr. Program Director Review
16.1	09/08/2022	Allyson Newman	Updates for Release 19.0 Updated text throughout Updated Figures 2-7, 10, 11, 13, 14, 18, 20, 23, 24, 26, 30, 32, 34, 36, 40, 41, 43, 44, 48, 50, 52, 54, and 56



Version	Date	Author	Description
16.2	09/12/2022	Connor Reed	Review of updates for Release 19.0
16.3	10/03/2022	Lorelei Cox	Project Manager Review
16.4	10/05/2022	Kathryn Hooker	QC review of updates
16.5	10/25/2022	Allyson Newman	Updated screenshots with new CV icon throughout
16.6	10/26/2022	Connor Reed	Review of updates
16.7	11/14/2022	Kathryn Hooker	QC Review
16.8	11/15/2022	Jennifer Cote	PMO Project Manager Review
17.0	11/17/2022	Susan Burke	Sr. Program Director Review
17.1	01/30/2023	Connor Reed	Release 20.0 Updates Updated release number Updated date
18.0	02/08/2023	Susan Burke	Sr. Program Director Review
18.1	03/15/2023	Allyson Newman	Release 21.0 Updates Updated release number Updated date Replaced Figures and updated Alt Text: 1-5, 7-8, 15, 19, 28, 30, 34, 37-40, 42-47, 53
18.2	03/17/2023	Connor Reed	Review of 21.0 Updates
18.3	03/20/2023	Yasir Hashmi	Manager Review
18.4	04/20/2023	Kathryn Hooker	QC Review
18.5	05/01/2023	Jennifer Cote	PMO Project Manager Review
18.6	05/01/2023	Ariel Daza	Deputy Program Manager Review
19.0	05/03/2023	Jennifer Parker	Sr. Program Manager Review
19.1	06/07/2023	Allyson Newman	Release 22.0 Updates Updated release number Updated date Replaced Figures 11, 12, 13
19.2	06/07/2023	Connor Reed	Review of Release 22.0 updates
19.3	06/20/2023	Yasir Hashmi	Manager Review
19.4	06/20/2023	Lorelei Cox	Project Manager Review
19.5	06/26/2023	Kathryn Hooker	QC Review
19.6	07/03/2023	Jennifer Cote	PMO Project Manager
19.7	07/05/2023	Ariel Daza	Deputy Program Manager Review
20.0	07/10/2023	Jennifer Parker	Sr. Program Manager Review



Version	Date	Author	Description
20.1	09/26/2023	Allyson Newman	Release 23.0 Updates Updated release number Updated date Replaced figures 10, 11, 12, 19, 20, 21, 27, 31, 33, 35, 51, 53, 55, and 56
20.2	10/02/2023	Alex Hines	Review of Release 23.0 updates
20.3	10/16/2023	Yasir Hashmi	Manager Review
20.4	10/18/2023	Lorelei Cox	Manager Review
20.5	10/19/2023	Kathryn Hooker	QC Review
20.6	10/25/2023	Jennifer Cote	PMO Project Manager Review
20.7	10/25/2023	Ariel Daza	Deputy Program Manager Review
21.0	11/03/2023	Jennifer Parker	Sr. Program Manager Review
21.1	02/09/2024	Allyson Newman	Release 24.0 updates » Added RFS section » Added Reports section
21.2	02/21/2024	Yasir Hashmi	Manager Review
21.3	02/26/2024	Lorelei Cox	Project Manager Review
21.4	02/29/2024	Marwan Lavoie	QC Review
21.5	03/14/2024	Ariel Daza	Deputy Program Manager Review
21.6	03/15/2024	Jennifer Cote	PMO Project Manager Review
21.7	03/15/2024	Jennifer Parker	Sr. Program Manager Review
21.8	03/22/2024	Yasir Hashmi	Added RFS details under section 4.11
21.9	03/22/2024	Lorelei Cox	Project Manager Review
21.10	03/22/2024	Ariel Daza	Deputy Program Manager Review
22.0	03/22/2024	Jennifer Cote	PMO Project Manager Review

