



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Referred Care Information System (RCIS)

(BMC)

Addendum to User Manual

Version 4.0 Patch 16
June 2024

Office of Information Technology
Division of Information Resource Management

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1.0 Introduction

Please review these changes and add a copy of them to any printed documentation your site may be using for Referred Care Information System (RCIS) v4.0. These changes will be integrated into future versions of the software and user manuals. These changes will no longer be considered an addendum at the time of the next version release.

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

1.1 PRC Medical Priorities

The Indian Health Service Purchased Referred Care Medical Priorities are designed to better integrate patient care to meet the combined goals of improved patient outcomes and satisfaction.

Referral care is organized into four equal categories, in each of which are three priorities of care; Core (1), Intermediate (2), & Elective (3). Priority 4 includes Excluded Services.

Referral Care Categories

- a. Preventive and Rehabilitative Services: Services designed to maintain health, prevent disease or the complications of disease, as well as those services intended to return or maintain a higher level of physical functioning.
- b. Medical, Dental, Vision & Surgical Services: Services provided by medical, dental, vision, or surgical specialists, as well as diagnostic tests, equipment, and supplies, whose purpose is the diagnostic and treatment of disease.
- c. Reproductive & Maternal/Child Health Services: Reproductive and gynecological services as well as services provided to newborns, children, and adolescents.
- d. Behavioral Health Services: Services intended to address the mental health needs of the patient, including treatment of substance abuse disorders.

Referral Care Priorities

Core services (Priority 1): Essential

Must meet both criteria:

1. The service must be; indicated to protect life, limb, or vision in the next 30 days, or indicated for a substantial proportion of patients in the Indian Health Service.

2. The service must be an essential component of the current standard of care for the condition (i.e., you cannot provide appropriate care without the service).

Intermediate (Priority 2): Necessary

Standard of care services that are necessary for the diagnosis and management of chronic and non-emergent acute conditions.

Elective (Priority 3): Justifiable

Clinically justifiable services intended to enhance health and well-being.

Excluded (Priority 4): Includes cosmetic & experimental services

1.2 Summary of Changes

Patch 16 includes the following changes for both the Resource and Patient Management System (RPMS) RCIS application and the Referred-RCIS tabs located in the Electronic Health Record (EHR) Application.

RPMS RCIS application include:

- Close out amount for Tribal Supplement changed to allow dollars and cents instead of whole dollar amounts
- New Appointment Letter
- New age parameter for Referral letters to address Parents of Child
- Multiple Reports include option to save Excel file
- Systematized Nomenclature of Medicine (SNOMED) option added to General Retrieval Report
- Modification made to accept future appointment dates

RPMS RCIS application and RCIS tabs in EHR include:

- Add "C1" suffix to Referral Number for Call-Ins
- Prevent creation of "duplicate" referrals
- Referral Letter includes additional information for requested services
- Replace Contract Health with Purchased Referred Care (PRC) on Referral Letter
- Standardize Medical Priority options
- Use Actual begin/end date of service and Actual admission/discharge date on Referral form

RCIS tabs in EHR include:

- Changes included in both Referral/Template Referral forms and Non-patient centric RCIS tab:
 - Fix Integrated Problem List (IPL) List incorrectly displays
 - Fix error when saving provider narrative
 - Fix display of Referral Notes for secondary referrals
 - Prevent user from being able to close referral in EHR
 - Allow edit on a closed referral
 - Display Direct email dialog regardless if Direct email is entered
 - Display Direct email dialog for IHS facilities
 - Display Unique Entity Identifier (UEI) code in the Vendor Search option in Add/Edit Referral
 - Special characters not allowed in priority field
- Additional Changes to Non-patient centric RCIS tab:
 - New Columns for Primary Care Provider (PCP) and Transition of Care (TOC) acknowledgement date

2.0 Patch 16 Changes–RPMS RCIS

2.1 Close out amount for Tribal Supplement changed to allow dollars and cents instead of whole dollar amounts

When adding or editing inpatient or outpatient referrals the final close out values were modified to accept dollar values with two decimal places.

Menu Paths include:

- RCIS => DE => ADD
- RCIS => DE => RFY
- RCIS => DE => EDIT => MOD
- RCIS => DE => EDIT => MR

```

Referral: 2321012400042                               Date Entered: JAN 16,2024
PATIENT: DEMO,PATIENT - PREFERRED NAME*              PCC VISIT: JAN 16,2024@15
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (             CASE MANAGER: CLERK,REGISTRAT
REQUESTING PROVIDER: DEMO,DOCTOR                     INPT OR OUTPT: INPATIENT
Do you wish to view a FACE SHEET? N
REFERRAL TYPE: CHS                                    PRIMARY PAYOR: IHS
Provider OR Facility Referred To: UNSPECIFIED
Do you want to change the above Referral Provider/Facility? N
-----+-----+
PURPOSE OF REFERRAL: S | ESTIMATED COST: 100.25 |
Referral SNOMED: | ACTUAL COST: 80.54 |
PRIORITY: 6 | ESTIMATED IHS COST: 92.87 |
Appt/Begin DOS: | ACTUAL IHS COST: 75.96 |
***Press return at any of+-----+***
COST DATA:
DIAGNOSTIC/PROCEDURAL/MED HX:                      Referral Status: ACTIVE
-----
COMMAND:                                             Press <PF1>H for help      Insert
    
```

Figure 2-1: Display of close out amount for Tribal Supplement dollars and cents

2.2 New Appointment Letter [PAPT]

A new Appointment letter was created to supplement the referral letter. It includes detailed information and instructions for the patient. The letter includes the referred provider details, referral number, appointment date, and approved visits. There is site-specific text for both inpatient and outpatient in the site parameters. If the site has specific instructions for their facility, this information will print on the last line before the PRC signature line. This letter has a top margin for use on an IHS letterhead.

PRC Appointment Letter is available for CHS, IHS, and OTHER referral types. The letter is not available for In-house referral type, the user will receive a message to select a CHS, IHS Facilities, or OTHER referral type.

Menu Path = RCIS => MGT => ESP

```

UPDATE REFERRED CARE INFORMATION SYSTEM (RCIS) PARAMETERS
*****
Referral Year 24                               STATE: NEW MEXICO
ACTIVATE CHS LINK? YES                         ACTIVATE PCC LINK? YES
PROMPT FOR MGED CARE COM ACTION? YES          PROMPT FOR LOCAL CATEGORIES? DO
PROMPT FOR ICD/CPT CODES? NO                 AGE FOR MINOR: 16
ENTER YOUR SITE'S 'OTHER' LOCATION: OTHER
CASE MGR: CLERK,REGISTRATION                  CHS SUPERVISOR: CLERK,ADMISSION
BUSINESS OFFIC+-----+
| PRESS RETURN TO EDIT CHS APPROVED TEXT:    |
REFERRAL CONTA| PRESS RETURN TO EDIT CHS DENIED TEXT:    |
REFERRAL CONTA| PRESS RETURN TO EDIT CHS PENDING OR UNKNOWN TEXT:    |
RCIS ACTIVAT| PRESS RETURN TO EDIT OTHER REFERRAL TEXT:    |
Mailman/Alert | PRESS RETURN TO EDIT INPT APPOINTMENT LETTER TEXT:    |
PRIORITY ON AL| PRESS RETURN TO EDIT OUTPT APPOINTMENT LETTER TEXT:    |
PRIORITY HELP +-----+
SEC REF AUTO POPULATE POV: NO                 Prompt to print Consult Letter:
    
```

Figure 2-2: Site Specific parameters for Inpatient and Outpatient Letter Text

Menu Path = RCIS => MGT => DISP => DSP

```

OUTPUT BROWSER           Mar 26, 2024 12:59:52           Page: 6 of 6
RCIS Site Parameter Display
+
-----
Purchased Referred Care

INPATIENT Appointment Letter Text:
Demo of Inpatient appointment text.

OUTPATIENT Appointment Letter Text:
Demo of Outpatient appointment text.

Enter ?? for more actions                               >>>
+ NEXT SCREEN           - PREVIOUS SCREEN           Q QUIT
Select Action: +//
    
```

Figure 2-3: Sample display of Inpatient and Outpatient site specific text

Menu Path = RCIS => DE => LTRS => PAPT

IMPORTANT REFERRAL INFORMATION	
MAR 26, 2024	
**To the Parents of PATIENT DEMO:	
PATIENT DEMO 1234 Main Street YOURTOWN, OKLAHOMA 76777	
Provider: UNSPECIFIED	Referral #: 2321012400002
Address: 1000 FISHER LANE ROCKVILLE, MARYLAND 20857	Appointment Date: 10/3/23 Approved Visits: 3
Phone #:	
<p>If you are unable to keep your appointment, please contact the facility you were referred to or contact the PRC office to cancel and/or reschedule. If the appointment has changed, please inform the PRC office with the new appointment date. An appointment letter will not be provided if you no-show or reschedule an appointment.</p>	
<p>****We are not responsible for No Show Charges****</p>	
<ul style="list-style-type: none"> · Appointment Check-in: When you check in for your appointment, please provide the facility with your insurance information if you have Medicare, Medicaid or Private Insurance. · Follow-up/Additional Appointments: If the provider, at your appointment, schedules a follow up visit, additional testing (i.e. CT scan, MRI, etc.), or refers you to another provider, please contact PRC. · Prescriptions: Outside prescriptions can be filled at IHS if there is an approved PRC referral and no restrictions are noted in the Patient's chart. · Medical Bills: When you receive a bill for your visit, bring it to the PRC department for payment. If your bill continues to go unpaid please contact the PRC Supervisor, CLERK,ADMISSION. 	
<p>The patient, parent or guardian is responsible for notifying PRC about any additional referrals during this appointment. You may be requested to see your Primary Care Provider to follow-up or issue new referrals.</p>	
<p>All referrals expire once the number of authorized visits are used or up to 90 days from the date of approval.</p>	
<p>If you need transportation, please call (888)123-4444 to reserve a seat. The reservation should be made 2 days prior to your appointment.</p>	
<p>Thank you, _____ PRC STAFF</p>	

Figure 2-4: Display of Appointment Letter

2.3 New age parameter for Referral letters to address Parents of Child

A new parameter, “Age for Minor”, was created to allow sites to indicate at what age the patient is still considered a minor. It is this age and under that the letters will be addressed to the child’s parents. The default parameter will be 18 and the site will be able to select a value between 15-25.

The Print Alternate Resource Application Letter (PARL) will include an address line “**TO THE PARENTS OF DEMO,PATIENT:”. Provider phone number will display below the provider address.

Menu Path = RCIS => MGT => ESP

```

UPDATE REFERRED CARE INFORMATION SYSTEM (RCIS) PARAMETERS
*****
Referral Year 24 STATE: NEW MEXICO
ACTIVATE CHS LINK? YES ACTIVATE PCC LINK? YES
PROMPT FOR MGED CARE COM ACTION? YES PROMPT FOR LOCAL CATEGORIES? DO
PROMPT FOR ICD/CPT CODES? NO AGE FOR MINOR: 17
ENTER YOUR SITE'S 'OTHER' LOCATION: OTHER
CASE MGR: CLERK,REGISTRATION CHS SUPERVISOR: CLERK,ADMISSION
BUSINESS OFFICE SUPERVISOR: CLERK,SCHEDULING
Referral Facility Address (return):
REFERRAL CONTACT NAME: REFERRAL CONTACT
REFERRAL CONTACT PHONE: (555)555-5555 THIRD PARTY SIGNATURE: 3P SIG
RCIS ACTIVATION DATE: APR 29,2003 BENEFITS COORDINATOR:
Mailman/Alert Parameter (return): UNIVERSAL OR SITE SPEC. LOOKUP: U
PRIORITY ON ALL REFERRALS? YES MCC ACTION HS DISPLAY:
PRIORITY HELP TEXT (return): SITE-SPECIFIC LETTER TEXT (return):
SEC REF AUTO POPULATE POV: NO Prompt to print Consult Letter:
-----
COMMAND: Press <PF1>H for help Insert
    
```

Figure 2-5: Edit Parameters screen for AGE FOR MINOR

Menu Path = RCIS => MGT => DISP => DSP

```

OUTPUT BROWSER           Mar 07, 2024 10:57:55           Page:    3 of    6
RCIS Site Parameter Display
+
                AHCCCS NAME:
                AHCCCS ADDRESS:
                AHCCCS TELEPHONE NUMBER:
                AHCCCS PROVIDER NO:
                HLTH SUM DISPLAY MCC ACTION:
                CHS INPAT DEN CLOSE REF:  YES
                CHS OUTPAT DEN CLOSE REF: YES
                CHS REQUIRE REFERRAL:    YES
                CHS APPEAL UPDATE REF:   YES
                SECONDARY REF POV:      NO
                MAILMAN SUBJECT-PAT NAME: YES
                PROMPT FOR CONSULT LETTER:
                Send Alert: Ref Phy:    NO
                Send Alert: Primary Provider: NO
                AGE FOR MINOR: 17
    
```

Figure 2-6: Display Site Parameters screen for AGE FOR MINOR

Menu Path = RCIS => DE => LTRS => PARL

```

                PUBLIC HEALTH SERVICE
                PHS INDIAN HEALTH SERVICE

MAR 21, 2024

**To the Parents of PATIENT DEMO:

PATIENT DEMO
1234 Main Street
YOURTOWN, OKLAHOMA 76777

                Provider: DESERT MRI MED DIAGNOSTICS
                2135 W SOUTHERN
                MESA, ARIZONA 85202
                (602 835-3745)

                Service Date:
                Referral: 2321012400020
                Services: MRI
                Est. Amount: $0.00

Dear Patient:

The information that has been provided to the CHS Office indicates that you may be
qualified for an alternate resource. Pursuant to
IHS Regulations, 42 CFR Part C (attached), you are required to make a good faith
effort to complete an application for alternate
resources. You must provide this facility with a copy of the alternate resource
program's eligibility determination.

THE APPLICATION PROCESS REQUIRES YOU TO DO THE FOLLOWING:

    A. You must contact KIDSCARE to schedule an appointment
to complete an application. It is very important that you keep your scheduled
appointment.
    
```



```

Select one of the following:

      P          PRINT Output
      B          BROWSE Output on Screen
      C          CSV Output

Do you wish to: P// CSV Output
DEVICE: HOME// HFS HOST FILE SERVER
HOST FILE NAME: E:\TEMP\TMP.HFS//E:\TEMP\ARD.CSV ADDRESS/PARAMETERS:
"WNS"//

Won't you queue this ? Y// N
    
```

Figure 2-8: Sample Display Output Selection screen

***** CONFIDENTIAL PATIENT INFORMATION *****					
2021 DEMO HOSPITAL (INST)		Page 1			
REFERRAL INITIATED					
BEG DATE: MAR 1 2024 END DATE: MAR 30 2024					
ACTIVE REFERRALS SORTED BY BEGIN DATE OF SERVICE					
BEGIN DOS	REFERRAL #	PATIENT NAME	REF PROV	TYPE	FACILITY REFERRED TO

03/04/24 A	2321012400078C1	DEMO,PATIENT	--		<UNKNOWN>
	2321012400079	DEMO,PATIENT1	--		<UNKNOWN>
	2321012400080	DEMO,PATIENT2	--		<UNKNOWN>
RUN TIME (H.M.S): 0.0.0					

Figure 2-9: Sample Display Output Selection screen

2.5 SNOMED option added to General Retrieval Report

In the General Retrieval Report, a SNOMED option was added to the Referral Search and Print Item Selection menus detailed for all referrals (primary and secondary). The SNOMED code and the first 40 characters of the description will display.

Menu Path = RCIS => RPT => GEN

```

RCIS GENERAL RETRIEVAL      Mar 07, 2024 12:46:39      Page: 3 of 3
      REFERRAL Search Menu
Referrals can be selected based upon any of the following items. Select
as many as you wish, in any order or combination. An (*) asterisk indicates
items already selected. To bypass screens and select all referrals hit Q.
+
29) Primary Payor           65) Date Completed           101) Util Review Committe
30) Diagnostic Category     66) Pertinent Med Hx       102) SNOMED Term
31) Service Cat HCPCS/CP   67) Discharge Notes       103) Mgd Care Committee
32) Local Category         68) Best Avail DX Code    104) DT Mgd Care Action
33) Actual TOTAL Cost      69) Final Dx Code         105) Util Review Committe
34) Best Avail TOTAL Cos   70) Best Avail Procedure
35) Actual IHS Cost        71) Final Procedure Code
36) Best Avail IHS Cost    72) Call-in's Only

      Enter ?? for more actions
S   Select Item(s)         +   Next Screen           Q   Quit Item Selection
R   Remove Item(s)        -   Previous Screen       E   Exit Report
Select Action: S//
    
```

Figure 2-10: Referral Search Menu on General Retrieval Report

```

RCIS GENERAL RETRIEVAL      Mar 07, 2024 12:57:25      Page: 3 of 3
      PRINT ITEM SELECTION MENU
The following data items can be printed. Choose the items in the order you
want them to appear on the printout. Keep in mind that you have an 80
column screen available, or a printer with either 80 or 132 column width.
+
29) Inpatient/Outpatient   68) Best Avail END DOS     107) Sec. Prov User Creat
30) Visit # Auth           69) Actual END DOS         108) Sec. Prov Init Dt
31) Primary Vendor         70) Expected End DOS      109) Veteran
32) Facility Referred To   71) Best Avail Inpt LOS   110) Mgd Care Committee
33) IHS Facility Refer T   72) Actual Inpt LOS       111) DT Mgd Care Action
34) Clinic Referred To     73) Best Avail DRG        112) Util Review Committe
35) To Specific Provider   74) Final DRG             113) SNOMED Term
36) Primary Payor         75) Date Dsch Summary Re  114) Mgd Care Committee
37) Diagnostic Category    76) Date Completed        115) DT Mgd Care Action
38) Service Cat HCPCS/CP  77) Purpose of Referral   116) Util Review Committe
39) Local Category         78) Pertinent Med Hx

      Enter ?? for more actions
S   Select Item(s)         +   Next Screen           Q   Quit Item Selection
R   Remove Item(s)        -   Previous Screen       E   Exit Report
Select Action: S//
    
```

Figure 2-11: Print Item Selection menu on General Retrieval Report

REFERRED CARE INFORMATION SYSTEM REFERRAL LISTING		
REPORT REQUESTED BY: Demo	User	
The following report contains a RCIS Referral report based on the following criteria:		
REFERRAL Selection Criteria		
Snomed Term: 3457005		
PRINT Field Selection		
Patient Name (20)		
Chart # (8)		
Snomed Term (40)		
TOTAL column width: 74		
Referrals will be SORTED by: Patient Name		
<input type="checkbox"/>		
PCC REFERRAL LISTING		Page 1
NAME	HRN	SNOMED Term

RCIS,PATIENT ONE	TST999001	3457005 "Patient referral (procedure)"
RCIS,PATIENT TWO	TST999006	3457005 "Patient referral (procedure)"
RCIS,PATIENT THREE	TST999111	3457005 "Patient referral (procedure)"
Total Referrals: 3		
Total Patients: 3		
RUN TIME (H.M.S): 0.0.1		

Figure 2-12: Sample of General Retrieval Report with Snomed Term

2.6 Modification made to accept future Appointment Dates/Begin Date of Service

Modification was made to accept future Appointment Dates/Begin Date of Service on all referral types when adding a new referral or editing an existing referral.

```

Referral: 2321012400256                               Date Entered: MAY 9,2024
PATIENT: DEMO,PATIENT - PREFERRED NAME*              PCC VISIT: APR 16,2024@11
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (INST)
REQUESTING PROVIDER: DEMO,DOCTOR
Do you wish to view a FACE SHEET? N                  View Health Summary? N
REFERRAL TYPE: CHS                                    INPATIENT/OUTPATIENT: OUTPATIENT
PRIMARY PAYOR: IHS                                    Insurance Auth No:
PURPOSE OF REFERRAL: Pain
Referral SNOMED<RET+-----+
Are you sending add|      Begin Date of Service: JUN 8,2024      |
Do you want to ente|      End Date of Service:                    |
PRIORITY: 2B        |      Outpatient # of Visits: 1              |
ICD DIAGNOSTIC CATE+-----+
HCPCS/CPT CATEGORY: DIAGNOSTIC IMAGING
Notes to Scheduler:
Schedule Appointment within      Days      Next Review Date:
-----
COMMAND:                                     Press <PF1>H for help      Insert
    
```

Figure 2-13: Outpatient Referral sample of the future appointment date

3.0 Patch 16 Changes—RPMS RCIS application and RCIS tabs in EHR

3.1 Add "C1" suffix to Referral Number for Call-Ins

Modifications were made to call-in referrals to include a C1 suffix at the end of the referral number. The C1 suffix displays on primary call-in referrals only. The user will easily be able to identify call-in referrals from all displays and reports.

Menu Path = RCIS => DE => ADD

```

*****
*          INDIAN HEALTH SERVICE          *
*    REFERRED CARE INFORMATION SYSTEM    *
*          VERSION 4.0, Patch 16        *
*****
                2021 DEMO HOSPITAL (INST)
                Modify Referral - Current Fiscal Year

Select RCIS REFERRAL by Patient or by Referral Date or #: 500001
  DEMO,PATIENT - PREFERRED NAME*          F ** SENSITIVE **          TST 500001
                                                DC 500001

  1  DEMO,PATIENT - PREFERRED NAME*  10/03/23  2321012400002
     UNSPECIFIED                    10/03/23 E - 3          pain in head

  2  DEMO,PATIENT - PREFERRED NAME*  10/31/23  2321012400006C1
     LAKE HAVA PEDIATRICS           UNKNOWN SERVICE DATE - I HEAD INJURY

Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-2:
    
```

Figure 3-1: Call In referral number display on referral search screen

```

                                RCIS REFERRAL RECORD
Date: OCT 31,2023 Referral: 2321012400006C1  Call-in By: PATIENT
PATIENT: DEMO,PATIENT - PREFERRED NAME*      Call-in Notification: OCT 31,2023
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (    Display Face Sheet? N
REFERRAL TYPE: CHS                          PRIMARY PAYOR: IHS
INPATIENT/OUTPATIENT: INPATIENT             CASE MANAGER: CLERK,REGISTRATION
Appt/Begin DOS:

PROVISIONAL DRG:
ESTIMATED TOTAL REFERRAL COST:              ESTIMATED IHS REFERRAL COST:
Do you want to enter CHS Eligibility Factors?: N
PURPOSE/SERVICES REQUESTED: HEAD INJURY
PRIORITY: 2C
ARE YOU SENDING ADDITIONAL MEDICAL INFORMATION WITH THE PATIENT?
ICD DIAGNOSTIC CATEGORY: CIRCULATORY SYSTEM
HCPCS/CPT CATEGORY: DIAGNOSTIC IMAGING

COMMAND:                                     Press <PF1>H for help      Insert
    
```

Figure 3-2: Call In referral number display on edit referral screen

Referral Date	Purpose	Referring Provider	PCP	Referral Number	Referral Status	Facility Referred To
MAR 07, 2024	Chronic Allergy			2321012400147 - C1	ACTIVE	DEMO.CRAWLEY
MAR 07, 2024	Chronic Allergy	DEMO.DOCTOR		2321012400148	CLOSED-COMPLETED	DEMO.CRAWLEY
MAR 07, 2024	SINUS XRAY	DEMO.PROVIDER MN		2321012400152	ACTIVE	ABC VENDOR 2
MAR 14, 2024	Internal Test of TC's			2321012400171 - C1	ACTIVE	DEMO.CRAWLEY

Figure 3-3: Call In referral number display on EHR Consults/Referrals

3.2 Prevent creation of "duplicate" referrals

The code that generates referral numbers was modified to search for potential duplicates. When potential duplicates are found, a message will appear indicating this and will ask the user to confirm if it is a duplicate and if you would like to move forward. The following fields are used to identify a potential duplicate:

- Patient
- Vendor
- Referral Type
- Referring Provider
- Priority
- Visit Type

The user will be prompted with “Do you wish to continue with adding this referral?”. The prompt is defaulted to NO, if the referral is a duplicate the user may proceed to not add the referral. The message of “INCOMPLETE REFERRAL BEING DELETED!” will display. If the user decides the referral is not a duplicate, the user can enter YES, and a new referral will be created.

```

The following Referral(s) match on Referral Type, Vendor, Referring Provider,
Visit Type and Priority:
XXXXXXXXXXXXXX

Referral: XXXXXXXXXXXXXXXX maybe a possible duplicate Referral.
Do you wish to continue with adding this referral? NO//

INCOMPLETE REFERRAL BEING DELETED!
    
```

Figure 3-4: Potential duplicate referral message in RPMS

For the RCIS EHR Add Referral option, the message finds the duplicate and ask “do you want to create another referral (Y/N)?” User will select the appropriate option.

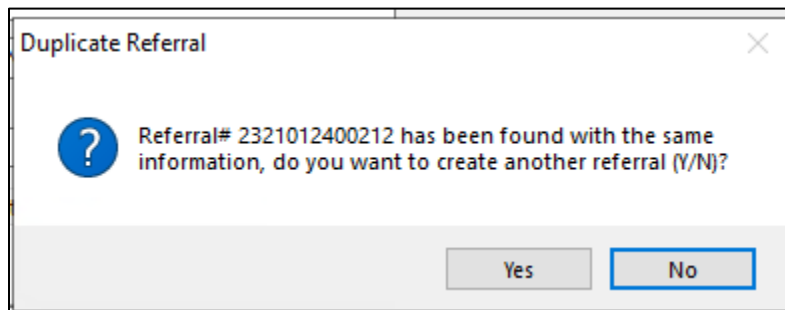


Figure 3-5: Potential duplicate referral message in EHR

3.3 Referral Letter includes additional information for requested services

Primary and Secondary Referral Letter have been updated to include the following changes:

- In the Purpose/Services Requested section, the ICD-10 Diagnosis and description will display. This information comes from the ICD DX/IPL selected diagnosis.
- The referral letter print option includes a new prompt asking the user if they want to print the Case Notes. If the user chooses to include the case notes, the letter will include a new page with Case Notes.

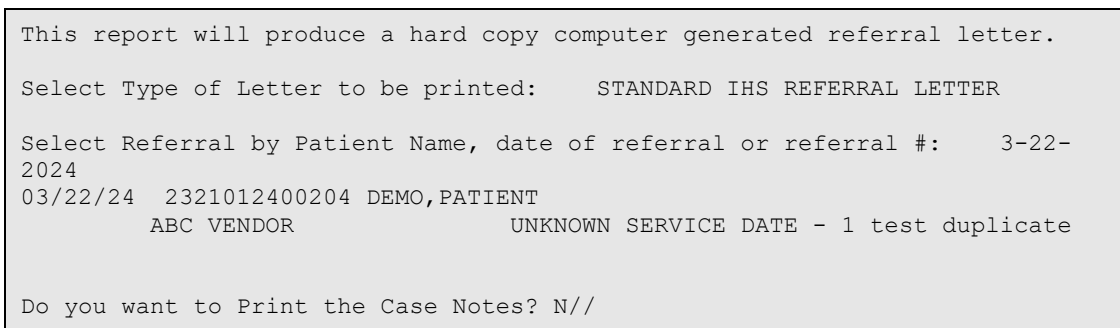


Figure 3-6: Display of Case Notes Print selection in RPMS

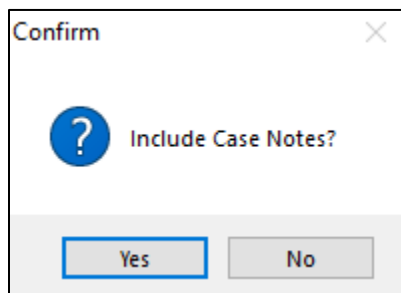


Figure 3-7: Display of Case Notes Print selection in EHR

```

Referral for Contract Professional Services      JAN 26, 2024
*****
Patient Identification, Address, Phone
Patient Name: DEMO,PATIENT                      ID Number: TST 999343
                                                Sex: MALE
Address: 10009 SOUR TRAIL                      DOB: 08/11/1977
        SANTA FE, NEW MEXICO 88812           Hm Phone: 321-921-9211
                                                Cell Phone: 322-745-7777
-----
Referred to: SONORA QUEST LABORATORIES (800-853-4288)
Mailing: PO BOX 67150                          Physical: 1255 W.WASHINGTON ST
        PHOENIX, AZ 85082-7150                TEMPE, AZ 85281-1210
Referral: 2321012400068
OUTPATIENT Services                          Appointment Date: 1/29/24
# of Outpatient Visits: 1                    Ending Date: 2/22/24
Priority Rating: 1A
-----
Purpose/Services Requested: Chest X-ray
ICD Diagnosis: I48.0 - Paroxysmal atrial fibrillation
              R50.9-Fever, unspecified
Provider medical history and findings attaching more information new
information added
Additional Medical Information Attached: NO
    
```

Figure 3-8: Purpose/Services Requested section on Referral Letter

```

Page 2
CASE REVIEW COMMENTS                          JAN 26, 2024
*****
Patient Name: TREE, GRAPEFRUIT                ID Number: TST 999343
Referral: 2321012400068
-----
Case Review Comments: MAR 06, 2024
Additional case notes added for referral
Case Review Comments: JAN 26, 2024
Adding case notes to test
    
```

Figure 3-9: Case notes display

3.4 Replace Contract Health with Purchased Referred Care on Referral Letter

Standard IHS Referral Letter was modified to display Purchased Referred Care instead of Contract Health Services for Referral Type–CHS.

```

Referral for Contract Professional Services      MAR 07, 2024
*****
Patient Identification, Address, Phone
Patient Name:  DEMO,PATIENT                    ID Number:  TST 500001
                                           Sex:  FEMALE
Address:  1234 Main Street                    DOB:  01/01/2020
           YOURTOWN, OKLAHOMA  76777          Hm Phone:  515-411-8744
                                           Cell Phone:  515-658-9090
-----
Referred to:  DEMO,CRAWLEY  (9053146547)
Mailing:  1234 WEST ELM DRIVE                Physical:
           ALBUQUERQUE, NM 87190
                                           Referral:  2321012400148
OUTPATIENT Services                        Appointment Date:
# of Outpatient Visits:  5
Priority Rating:  1A
-----
Purpose/Services Requested:  Chronic Allergy
ICD Diagnosis:  ZZZ.999 - Uncoded diagnosis
-----
Additional Medical Information Attached:  NO
-----
If you have any questions concerning this referral, please contact:
2021 DEMO HOSPITAL (INST)  (contact:  REFERRAL CONTACT)
5300 HOMESTEAD RD
ALBUQUERQUE, NEW MEXICO  87777  (phone:  (555)555-5555)
Referring Provider (ELECTRONIC SIGNATURE):  DEMO,DOCTOR
Case Manager:  CLERK,REGISTRATION
                                           Veteran:
Our records, as of 3/7/2024 indicate that this patient has the following
third party coverage:
  PATIENT HAS MEDICARE:  - 4DU8RR9HK99
  ELIG DATES:  5/12/2023 TO OPEN  COVERAGE:  A
  PATIENT HAS MEDICAID-PLAN NAME:  UNKNOWN - 99991111
  ELIG DATES:  1/1/2020 TO OPEN  COVERAGE:  02
  PRIVATE INSURER(S):  BC/BS OF KC - BI5039444
-----
*****
PENDING...THIS-TESTING SECONDARY LETTER IS A MEDICAL REFERRAL ONLY AND NOT A
GUARANTEE OF PAYMENT. CHS FUNDS ARE NOT AUTHORIZED BECAUSE THERE IS NOT ADEQUATE
INFORMATION TO MAKE AN ELIGIBILITY DETERMINATION AT THIS TIME. FOR A
DETERMINATION, PLEASE CONTACT THE PARKER SERVICE UNIT/CHS DEPARTMENT DURING
REGULAR BUSINESS HOURS: MONDAY THROUGH FRIDAY FROM 8:00 AM TO 5:00 PM.
-----
Purchase Referred Care
    
```

Figure 3-10: Referral Letter display with Purchase Referred Care signature for CHS type

3.5 Standardize Medical Priority options

Medical priority options were modified to a standardized list for both Primary and Secondary Referrals. Existing referrals that have old priority data will still display. If the user decides to change to the new priority values and saves the change, the previous non-standardized data will no longer be available for use.

Standardize Priority list includes the following entries for selection:

- 1A Core-Preventive and Rehabilitative Services
- 1B Core-Medical/Dental/Vision/Surgical Services
- 1C Core-Reproductive and Maternal/Child Health Services
- 1D Core-Behavioral Health Services
- 2A Intermediate-Preventive and Rehabilitative Services
- 2B Intermediate-Medical/Dental/Vision/Surgical Services
- 2C Intermediate-Reproductive and Maternal/Child Health Services
- 2D Intermediate-Behavioral Health Services
- 3A Elective-Preventive and Rehabilitative Services
- 3B Elective-Medical/Dental/Vision/Surgical Services
- 3C Elective-Reproductive and Maternal/Child Health Services
- 3D Elective-Behavioral Health Services
- 4A Excluded-Preventive and Rehabilitative Services
- 4B Excluded-Medical/Dental/Vision/Surgical Services
- 4C Excluded-Reproductive and Maternal/Child Health Services
- 4D Excluded-Behavioral Health Services

```

Referral: 2321012400217                               Date Entered: APR 1,2024
PATIENT: DEMO,PATIENT - PREFERRED NAME*              PCC VISIT: MAR 7,2024@14:
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (INST)
REQUESTING PROVIDER: DEMO,DOCTOR
Do you wish to view a FACE SHEET? N                  View Health Summary? N
REFERRAL TYPE: CHS                                   INPATIENT/OUTPATIENT:
PRIMARY PAYOR: IHS                                   Insurance Auth No:
PURPOSE OF REFERRAL:
Referral SNOMED<RET>: Patient referral (procedure)
Are you sending additional medical information with the Patient?
Do you want to enter CHS Eligibility Factors?: N
PRIORITY:
ICD DIAGNOSTIC CATEGORY:
HCPCS/CPT CATEGORY:
Notes to Scheduler:
Schedule Appointment within      Days      Next Review Date:
-----
1B-CORE-MEDICAL/DENTAL/VISION/SURGICAL SERVICES
1C-CORE-REPRODUCTIVE AND MATERNAL/CHILD HEALTH SERVICES
1D-CORE-BEHAVIORAL HEALTH SERVICES
2A-INTERMEDIATE-PREVENTIVE AND REHABILITATIVE SERVICES

Enter RETURN to continue or '^' to exit:
    
```

Figure 3-11: Sample Standardized Medical Priority List in RPMS

Figure 3-12: Sample Standardized Medical Priority List in EHR

3.6 Use Actual begin/end date of service and Actual admission/discharge date on Referral form

The referral form contained expected begin/end dates of service and expected admission/discharge dates. Referral form has been modified to use only the Actual begin/end date of service on outpatient referrals. The Actual Admission/Discharge date will be used for Inpatient. The user will no longer see the label for expected or actual. The field is displayed as Begin/End Date of Service and Admission/Discharge Date.

Menu Path = RCIS => DE => ADD

```

Referral: 2321012400152                               Date Entered: MAR 7,2024
PATIENT: DEMO,PATIENT - PREFERRED NAME*              PCC VISIT: MAR 7,2024@14:
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (   Display Face Sheet?  N
REQUESTING PROVIDER: DEMO,DOCTOR
REFERRAL TYPE: CHS                                  PRIMARY PAYOR: IHS
INPATIENT/OUTPATIENT: OUTPATIENT                   CASE MANAGER: CLERK,REGISTRATION
APPT/BEGIN DOS:      +-----+
PROVISIONAL DRG:      |   Begin Date of Service:      |
ESTIMATED TOTAL REF|   End Date of Service:          |
Do you want to ente| Outpatient # of Visits: 1        |
PURPOSE/SERVICES RE| Next Review Date:              |
Referral SNOMED <RE| Schedule Appointment within:    Days |
PRIORITY:            | Notes to Scheduler:          |
ARE YOU SENDING ADD|                               |
ICD DIAGNOSTIC CATE+-----+
HCPCS/CPT CATEGORY:
-----
COMMAND:                                             Press <PF1>H for help   Insert
    
```

Figure 3-13: Outpatient Referral display with use of begin/end date of service

```

Referral: 2321012400152                               Date Entered: MAR 7,2024
PATIENT: DEMO,PATIENT - PREFERRED NAME*              PCC VISIT: MAR 7,2024@14:
-----
REQUESTING FACILITY: 2021 DEMO HOSPITAL (   Display Face Sheet?  N
REQUESTING PROVIDER: DEMO,DOCTOR
REFERRAL TYPE: CHS                                  PRIMARY PAYOR: IHS
INPATIENT/OUTPATIENT: INPATIENT                     CASE MANAGER: CLERK,REGISTRATION
APPT/BEGIN DOS:      +-----+
PROVISIONAL DRG:      |   Admission Date:              |
ESTIMATED TOTAL REFERR| Inpatient LOS:                |
Do you want to enter C| Discharge Date:              |
PURPOSE/SERVICES REQUE| Next Review Date:              |
Referral SNOMED <RET>:| Schedule Appointment within:    Days |
PRIORITY:            | Notes to Scheduler:          |
ARE YOU SENDING ADDITI|                               |
ICD DIAGNOSTIC CATEGOR+-----+
HCPCS/CPT CATEGORY:
-----
COMMAND:                                             Press <PF1>H for help   Insert
    
```

Figure 3-14: Inpatient Referral display with use of Admission/Discharge Date

4.0 Patch 16 Changes–Referred-RCIS tabs (EHR)

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

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

- Patient centric view (to view referrals for a single patient):
 - Select a patient in the Patient Chart
 - Click the Consults/Referrals tab
- Non-Patient centric view (to view referrals for all patients):
 - Click the RCIS tab

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

4.1.1 Fix IPL List incorrectly displays

The IPL list included display from a previous patient. EHR was updated to refresh when switching between the patient context tab and the non-patient centric tab.

4.1.2 Prevent user from being able to close referral in EHR

Modifications were made to prevent the user from closing a referral through EHR. Referral closures are maintained by the PRC office and should be done through RPMS RCIS application. The options to close a referral were removed from the context menu when a user right clicks on a referral.

4.1.3 Allow edit on a closed referral

A user can append the notes section for Medical Hx/Findings, Case Notes and Referral Notes for a closed referral. The user can select to edit the referral from the patient or non-patient centric tabs.

Figure 4-1: Display of Referral Notes append for a closed referral

4.1.4 Display Direct email dialog regardless if a Direct email is entered

Modifications were made to display the Direct email dialog regardless if an email address is stored in the Location file or Vendor file when the Consolidated Clinical Document Architecture (CCDA) Submit or Submit and Print button is clicked.

Note: This requires software changes in the Consolidated Clinical Document Architecture (CCDA) and Electronic Health Record (EHR).

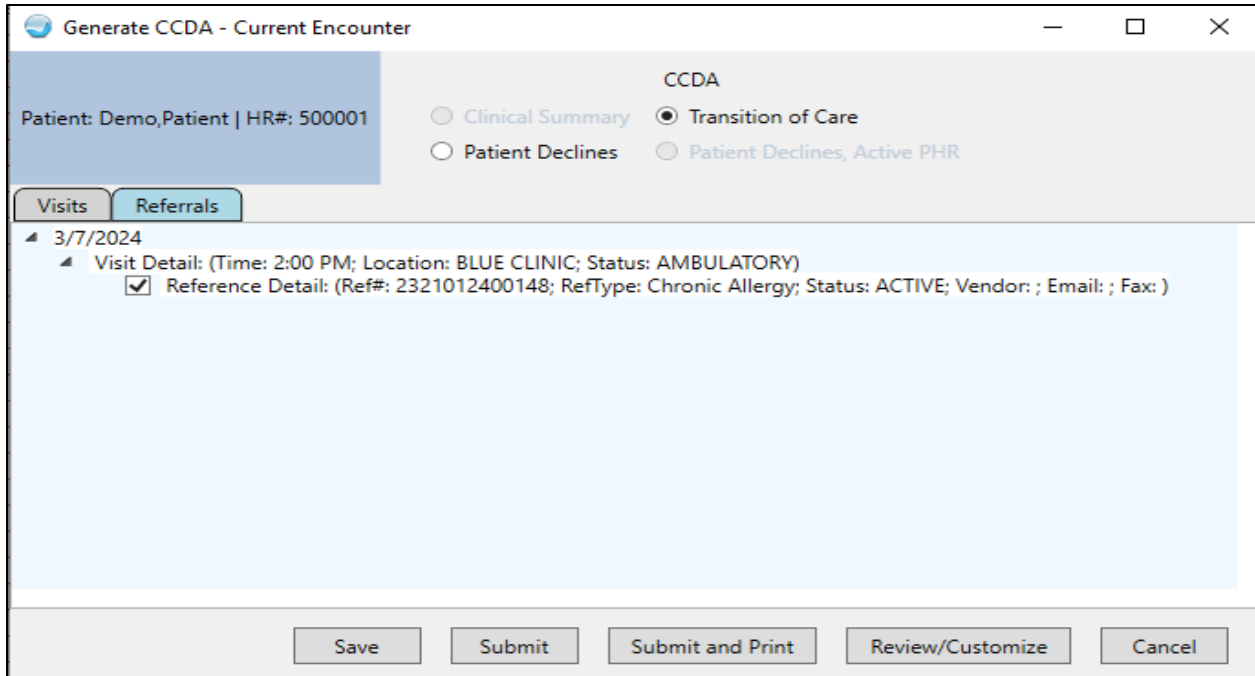


Figure 4-2: Display of Submit and Submit and Print buttons on CCDA

4.1.5 Display UEI code in the Vendor Search option in Add/Edit Referral

When adding or editing a primary or secondary referral, vendor search will now display the UEI code and will no longer display the Data Universal Numbering System (DUNS).

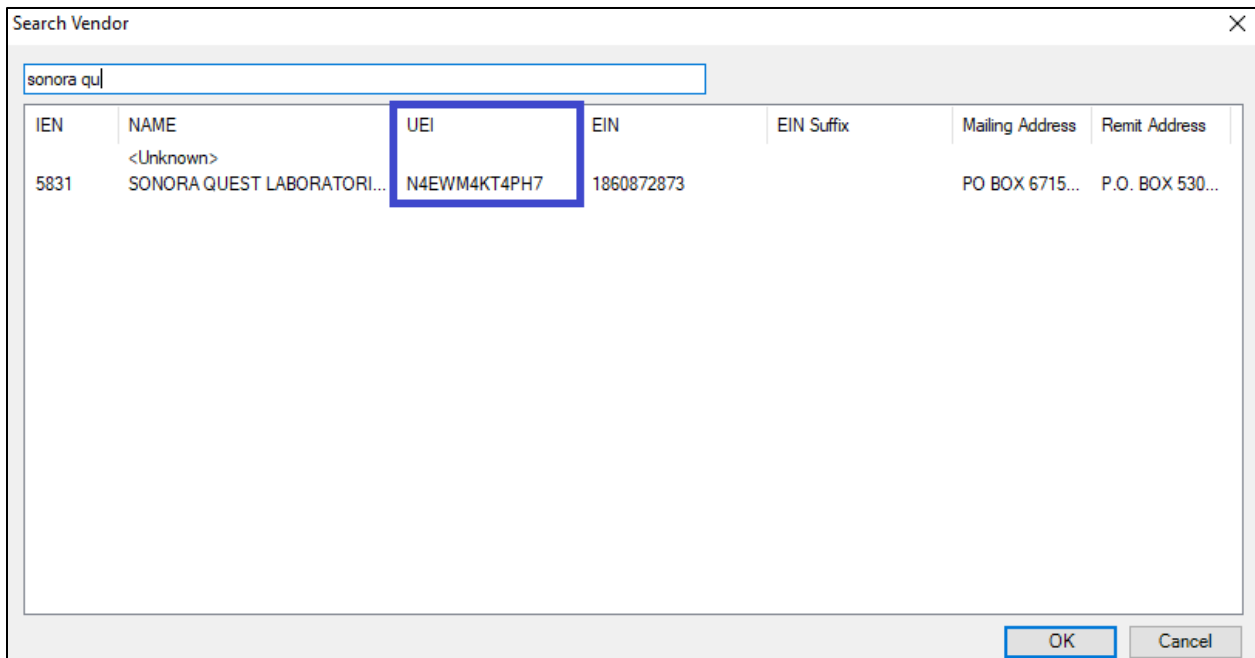


Figure 4-3: Display of UEI column in the vendor search

4.2 Additional Changes to Non-Patient centric RCIS tab

4.2.1 New Columns in EHR RCIS lists

New columns were added to the Patient and Non-Patient Centric RCIS tab in EHR.

- Primary Care Provider (**PCP**) column was added to display the patient’s PCP.
- Acknowledge Date/Time (**Ack Date/Time**) was also added as a column to edit acknowledge date of when the Transition of Care (TOC) has been printed or submitted. To edit, right click to display the context menu to add/edit the acknowledge date/time.

This screenshot shows the 'Referrals' tab in a patient-centric view. The table lists referral details with new columns for PCP and Ack Date/Time highlighted in blue.

Referral Date	Purpose	Referring Provider	PCP	Referral Number	Referral Stat...	Facility Referred To	Appointment Date/Ti...	Ack Date/Time	Clinical Consultation	Printed By	Print Date	Type
MAR 22, 2024	test duplicate	DEMO.PROVIDER MN	DEMO.PROVIDER MN	2321012400204	ACTIVE	UNSPECIFIED	MAR 22, 2024	MAR 25, 202...		CLERK.REGIS...	MAR 25, 2024@15...	CCDA TRANSMI...
MAR 22, 2024	TEST DUP...	DEMO.PROVIDER MN	DEMO.PROVIDER MN	2321012400206	ACTIVE	UNSPECIFIED						

Figure 4-4: Patient centric display of PCP and Ack Date/Time

This screenshot shows the 'RCIS' tab in a non-patient-centric view. The table lists referral details with new columns for PCP and Ack Date/Time highlighted in blue.

Patient Name	Date Of Birth	Referral Date	Purpose	Referring Provider	PCP	Referral Number	Referral Status	Facility Referred ...	Appointment...	Ack Date/Time	Clinical Consulta...	Printed By	Print Date	Type
TREE.SHADY (#999380)	09/19/1938	MAR 22, 2024	test duplicate	DEMO.PROVIDER MN	DEMO.PROVIDER ...	2321012400204	ACTIVE	UNSPECIFIED	MAR 22, 2024	MAR 25, 2024@...		CLERK,R...	MAR 25, 2024@15:00	CCDA TRANSM...
TREE.SHADY (#999380)	09/19/1938	MAR 22, 2024	TEST DUPLU...	DEMO.PROVIDER MN	DEMO.PROVIDER ...	2321012400206	ACTIVE	UNSPECIFIED						

Figure 4-5: Non-Patient centric display of PCP and Ack Date/Time columns

This screenshot shows the 'RCIS' tab with a context menu open over the 'Ack Date/Time' column for the second row. The menu option 'Add/Edit Acknowledge Date' is highlighted.

Patient Name	Date Of Birth	Referral Date	Purpose	Referring Provider	PCP	Referral Number	Referral Status	Facility Referred To	Appointment Date/Time	Ack Date/Time
TREE.SHADY (#999380)	09/19/1938	MAR 22, 2024	test duplicate	DEMO.PROVIDER MN	DEMO.PROVIDER MN	2321012400204	ACTIVE	UNSPECIFIED	MAR 22, 2024	MAR 25, 2024@15:05
TREE.SHADY (#999380)	09/19/1938	MAR 22, 2024	TEST DUPLICATE X1	DEMO.PROVIDER MN	DEMO.PROVIDER MN	2321012400206	ACTIVE	UNSPECIFIED		

Figure 4-6: Sample display of Context Menu for Add/Edit Acknowledge Date

Acronym List

Acronym	Term Definition
CCDA	Consolidated Clinical Document Architecture
CHS	Contract Health Services
EHR	Electronic Health Record
GUI	Graphical User Interface
IHS	Indian Health Service
IPL	Integrated Problem List
PAPT	Print Appointment Letter
PARL	Print Alternate Resource Application Letter
PCP	Primary Care Physician
PRC	Purchased Referred Care
RCIS	Referred Care Information System
RPMS	Resource and Patient Management System
SNOMED	Systematized Nomenclature of Medicine
TOC	Transition of Care
UEI	Unique Entity Id

Contact Information

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

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