

HealthShare Referral Manager Quick Reference Guide for Community Providers

Community Care Referral and Authorization | November 2024

HealthShare Referral Manager

HealthShare Referral Manager (HSRM) is an electronic referral and authorization processing system used by the Department of Veterans Affairs (VA) to accelerate Veterans' access to community care. HSRM allows VA, third-party administrators (TPAs), and community providers to better manage community care referrals and authorizations. HSRM facilitates a reduction in turnaround time for processing referrals, providing care, submitting claims, and receiving payment. This quick reference guide (QRG) is one of several guides that will help users get the most out of HSRM.

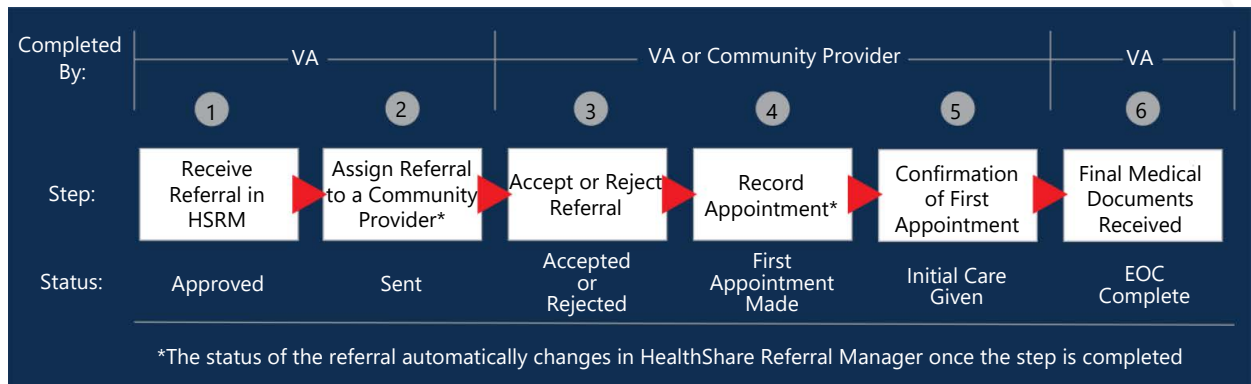
Quick Reference Guide Topics

- » Referral lifecycle overview
- » Locate a referral
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Overview of the Referral Lifecycle

A referral's lifecycle begins when HSRM receives a referral, 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. VA performs steps 1, 2, and 6, while VA or the community provider completes steps 3, 4, and 5. The referral lifecycle process is diagrammed in **Exhibit 1**.

Exhibit 1: Referral Lifecycle





Locate a Referral

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






Users can find referrals by sorting the **Referral List** or by using the **Find Referrals** or **Find Referral by Patient** features. Users can sort 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 (descending), making it easy to see which referrals need immediate attention.

To locate a referral by sorting column headings:

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.
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 (**Date Added**, descending).
3. Select the row of the relevant referral to access the **Referral Details** screen.



The Advanced Sort feature provides multiple criteria by which users can sort the **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  or the **Menu** icon  and then selecting **Referral List** on the menu.
2. Select the Advanced Sort hyperlink on the **Referral List** to activate the **Advanced Sort**. The available options appear. Both primary and secondary sort criteria can be selected. Select the **Ascending**  icon (also called ascending icon by screen readers) or **Descending**  icon (also called descending icon by screen readers) associated with the specific criterion for the sort.
3. Select the **Apply**  button (also called apply by screen readers). The referrals are now sorted according to the sort criteria. Select the row of the relevant referral to view the Referral Details screen.

The **Find Referrals** feature allows users to find referrals using various criteria, such as the 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 tasks.

To locate a referral using the Find Referrals feature:

1. Select the **Menu** icon  from any screen to view the menu.
2. Select **Find Referrals** to navigate to the **Referral Search** screen.
3. Enter information in any field within the **Referral Search** screen. The **Multiple Statuses** field is mandatory and must be satisfied before completing the search. All statuses are pre-populated by default.
4. Select the **Find** button  (also called find button by screen readers). The resulting **Referral List** screen lists referrals that match the search criteria.


To locate a referral using the Find Referral by Patient feature:



1. Select the **Menu** icon  from any screen to view the menu.
2. Select **Find Referral by Patient** to navigate to the **Patient Search** screen.
3. Enter information in any field within the **Patient Search** screen. The **First Name, Last Name**, and **Date of Birth** fields are mandatory and must be satisfied before completing the search.
4. Select the **Find** button  (also called find button by screen readers). The resulting **Patient List** screen lists patients in HSRM that match the search criteria.

Manually Change the Status of a Referral

The referral status shows where a referral is in its lifecycle. Community providers can only use Accepted, Rejected, First Appointment Made, and Initial Care Given.

To manually update the status of a referral:

1. Locate the referral (see the **Locate a Referral** section of this guide).
2. Navigate to the **Referral Details** screen by selecting the referral row.
3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen.
4. Select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) and select the new status.

» *Note: If the user selects the **Rejected** status, the **Referral Return Reason** field will be editable and mandatory.*
5. Enter any relevant comments regarding the referral in the **Comments** field of the **Referral Processing Information** section.
6. Select the **Update** button  (also called update button by screen readers) to save changes and return to the previous screen. Selecting the **Apply** button  (also called apply button by screen readers) saves changes and stays on the same screen.

Access SEOC Information

A SEOC is a bundle of services authorized under a single referral within a specific period of time. A SEOC helps reduce the need to request authorization for each service. Within HSRM, the user can view the SEOC, and the procedural overview of services authorized in that referral.


To view SEOC details:

1. Locate the referral (see 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 Requested** section on the **Referral Details** screen and select the **SEOC Details** link.
4. Review the **Procedural Overview** for the SEOC.





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, the referral number (used as the authorization number), additional referral information, billing and precertification information, patient details, and SEOC information. Community providers can print offline referral forms for individual or multiple referrals.

To print the Offline Referral Form for an individual referral:

1. Locate the referral (see 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 Referral List component menu by screen readers) on the **Referral Details** section to open the **Component Menu**, then select **Offline Referral Form**.
4. The **Offline Referral Form** appears, and users can print, download, and save the form.

To generate an Offline Referral Form for multiple referrals:

1. Navigate to the **Referral List** by selecting either the **Home** icon  or the **Menu** icon  and select **Referral List** on the menu.
2. Select the **Toggle Multiple Selection** checkbox  (also called toggle multiple selection checkbox not checked) to enable the selection of multiple referrals, then check the boxes associated with the appropriate referrals.
3. Select the **Component Menu** icon  and select **Offline Referral Form**.
4. The **Offline Referral Form** appears, and users can print, download, and save the form.





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, and community providers can upload relevant care documentation for VA's review.

To view and download documents:

1. Locate the referral (see 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 section of the **Referral Details** screen to open the **Documents** screen. Users can view and download all documents added to the referral by selecting on the document's row.

To add documents to a referral:



1. Locate the referral (see 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** link on the **Referral Details** section of the **Referral Details** screen to open the **Documents** screen.
4. Select the **New** button  (also called new button by screen readers) on the **Documents** screen. The **Add Document** screen appears.
5. Enter data in the corresponding fields on the **Add Document** screen.
6. Select the **Upload** button  (also called upload button by screen readers) and select the file from the computer's hard drive.
7. Select the **Magnifying Glass** icon  (also called 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  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.

Record and Manage Appointments






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 appointments in the system from the Referral Details screen, but they will also need to book the appointment in their own external systems.

To record an appointment:

1. Locate the referral (see 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  located in the **Referral Details** section to open the **Component Menu**.
 - » *Note: Users must be at the top of the screen to see the Component Menu.*
4. Select Options and **Record Appointment**.
5. Enter the appropriate information (e.g., **Appointment for, Scheduling Method, Date/Time**, etc.). Mandatory fields are indicated by an asterisk (screen readers identify asterisks as star and required).
 - » *Note: For referrals in Community Care Network (CCN) 1 – 5 who are recording their first appointment, there will be a mandatory yes/no question on the Record Appointment screen: Did the Veteran self-schedule their appointment or independently request this specific appointment date? This question will not be required for subsequent appointments.*
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, select the **PPMS** (Provider Profile Management System) **Provider Search** link. The **PPMS Provider Search** screen appears.
7. Enter the provider's National Provider Identifier (NPI) in the **NPI** field on the **PPMS Provider Search** screen and select the **Find** button. The **State, Zip Code**, and **Affiliation** fields may also be used to narrow the search results.
8. Select a provider for the referral by selecting the row of the provider. The **Record Appointment** screen appears. The **Provider Name** field populates.
 - » *Notes:*
 - *For subsequent appointments, the previous caregiver will appear in that field and will need to be changed if the caregiver is different.*
 - *The secondary provider must be in the same network as the primary provider.*
9. Select the **Update** button  on the **Record Appointment** screen to save changes. The **Referral Details** screen appears, and the referral's status automatically changes to **First Appointment Made**.
 - » *Notes:*
 - *If an appointment is recorded for a provider other than the initial community provider, that second provider will not see the referral on their Referral List. They will instead receive a task on their facility's Task List that will allow them to work with the referral.*
 - *If any part of the appointment is recorded incorrectly, it must be cancelled, and a new appointment must be recorded.*


To change the status of an appointment:

1. Locate the referral (see the **Locate a Referral** section of this guide).
2. Select the **Action Menu** icon  (also called link patient banner action menu by screen readers) on the corresponding referral row and select **Additional Referral Information**.
 - » *Note: The Action Menu icon  is also available from the Referral Details screen in the Patient Banner.*
3. Locate the appointment from the **Appointments** section and under the status column select the hyperlink. The **Appointment Change Status** screen appears. From here, users can select a status as **Cancelled**, **Completed**, or **No Show**.
4. The **Change Status To** field automatically populates as **Cancelled**. To select another status, select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) in the **Change Status To** field and select a status from the drop-down list.
 - » *Notes:*
 - *If the user selects No Show, they must populate the Reason for No Show field.*
 - *If the user cancels the appointment, the appointment will no longer be editable upon saving the changes.*
 - *If the user changes the appointment status to Completed, they will not be able to change the status to Canceled.*
5. Select the **Magnifying Glass** icon  (also called lookup graphic by screen readers) in the **Reason for Cancellation** field and select the appropriate reason for cancellation from the available options.
6. Enter any additional information regarding the appointment cancellation.
7. Select the **Update** button  to save changes.

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 notes, and letters related to the referral.

To view additional referral information:




1. Locate the referral (see the **Locate a Referral** section of this guide).
2. Select the **Action Menu**  icon on the corresponding referral row and select **Additional Referral Information**. The **Action Menu** is also available from the **Referral Details** screen in the **Patient Banner**.

3. The **Additional Referral Information** screen appears, showing **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Consult Factors**, **Referral Notes**, and **Letters** related to the referral. Select each one to view the corresponding information.

Work with Tasks


A task in HSRM represents a discrete action that users must complete for a Veteran's referral. Tasks can be created manually, while others are generated automatically. They minimize administrative burden, streamline communications, and enable VA and community providers to share information without having to pick up the phone or send emails and faxes. Some tasks serve as reminders for submitting medical documents and precertification information, minimizing potential delays in payment.

To manually create a task:



1. Locate the referral (see the **Locate a Referral** section of this guide).
2. Select the **Action Menu**  icon on the corresponding referral row, then select **Add Task**.
3. The **Task Edit** screen appears. The **Patient Banner** shows demographic information for the patient with which the referral is associated.
4. Enter the appropriate information (e.g., **Task Item**, **Priority**, **Status**, **Comments**) to create the task. **Task Item**, **Priority**, **Status**, and **Start Date** fields are mandatory and can be edited.
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.

The Task List displays all task items for the facility. From the Task List, users can review the item, edit it, and mark it as complete.


To view or edit a task:

1. Select the **Menu** icon  and select **Task List** from the drop-down options.
2. Locate the task on the **Task List**.
3. Select the hyperlink in the **Task** column to navigate to the **Task Edit** screen. The **Task Edit** screen appears.

» *Note: Overdue tasks will have a red square in the Due Date column.*
4. Review the task, including any comments.

5. 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.
6. Edit the **Comments** field.
7. Select the **Update** button  to save the task information and return to the **Task List**.

To mark a task as complete:

1. Select the **Menu** icon  and select the **Task List** option.
2. Locate the task on the **Task List**.
3. Check the box in the **Completed** column of the task.



Requests for Services

If a community provider needs a new referral from VA, either because the referral is expiring or the provider needs to offer a service not included in the SEOC, the provider must submit a request for services (RFS) 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. The online form will allow electronic signature of the RFS and can be accessed from two security groups:

- » **Community Staff** – Allows provider staff to access and create an RFS
- » **Community Care Provider** – Allows credentialed providers assigned to the Community Care Provider security group access to create, and sign an RFS

To obtain access to the **Community Care Provider** security group, please ask the CCRA HSRM administrator for your facility to submit an updated [End User Tracker \(EUT\)](#) to hsrmsupport@va.gov. To receive this security role, you must be an MD, DO, NP, PA, DPT, DC, Acupuncturist, Massage Therapist, or Respiratory Therapist and have an active ID.me account.

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.
2. Select **Requests for Services**.
3. On the **Requests for Services** screen, select the **New** icon .
4. Select **Request for Services Questionnaire**.
5. Complete all required fields and details of the request.
6. Sign and submit to VA.

- » *Note: To submit the online RFS, the provider facility must have at least one user with the Community Care Provider security group to electronically sign the RFS form.*

For more information on submitting a Request for Services, please see the [HSRM Community Provider End User Guide](#).

Community Provider Precertification

There may be occasions when a referral requires VA to call third-party payers (TPPs) for precertification for patients who are Veterans Health Administration (VHA) beneficiaries with other billable health insurance (OHI). If a referral requires OHI precertification, it will have either PRCT REV or PRCT listed in the SEOC name. For specific steps and guidance on how to perform the precertification steps, please see the HSRM Community Provider End User Guide and/or the precertification requirements on [VA's Community Care website](#).


- » [Community Provider User Guide](#)
- » [Precertification Requirements](#)
- » [Third Party Payer Precertification Form](#)

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 is accessible from the **Patient Banner** and from the **Veteran's Medical Record** link on the **Referral Details** screen for any Veteran that has relevant data in the system.

Note: The Community View Only security group does not have access to Clinical Viewer.

To access Clinical Viewer:

1. Locate the referral (see 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** section of the **Referral Details** screen.
3. If the user selects the **Clinical Viewer** icon on the **Patient Banner**, a flyaway menu will open. Select the **Veteran's Medical Record** option on the menu. Alternatively, if the user selects the **Veteran's Medical Record** link below the **Add/View documents** link, it will bypass the menu and take them directly to Clinical Viewer.

4. The Clinical Viewer home screen will open, displaying the patient's medical history in HSRM. The categories of information available for viewing are in a list called the **Chartbook**. Select any row in the **Chartbook** to view the data for that category.

» *Note: All information in Clinical Viewer is read-only, and 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.*

Additional Resources

Contact the HSRM Help Desk for support. Open a ticket by phone at 1-844-293-2272, or email hsrmsupport@va.gov and request that the ticket be sent to the **HSRM – Tier 1 queue**. Additionally, the following websites and email address provide quick access to commonly needed materials:

- » [VA Community Care Website](#)
- » [Community Provider HealthShare Referral Manager Training](#)
- » [Community Provider eLearning](#)
- » [Billing and Claims Email Address](#)