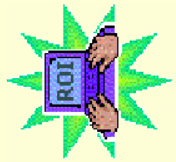
Release of Information Manager
Quick Reference Guide

+



Support

If you encounter problems with the application, please follow your facility's process for reporting computer or software issues to determine if this is a local network problem, workstation issue or an ROI software issue.

Once it is determined the problem is an ROI software issue, please have the problem entered in NOIS.

Document Storage Systems, Inc., Product Support, is monitoring NOIS Monday through Friday from 8:00 AM to 7:00 PM (EDT) and will respond to all NOIS requests within the timelines required by VHA policy.

If assistance is needed after the hours noted above, DSS Product Support can be reached at 561-309-0974. This number is only active after 7:00 PM (EDT).

The maintenance period under this contract is October 1, 2002 through April 30, 2004.

REQUESTOR INFORMATION SELECTION TABLE

Requestor Type	Reason for Request	Authority for Request	Type of Request
POA/Guardian/Executor	Personal Benefits	Veteran Right POA	First Party Privacy Third Party Privacy
Patient/Veteran (Personal Representative)	Personal	Veteran Right Power of Attorney	First Party Privacy
Insurance Company	Benefits Payment	Authorization Payment	Third Party Privacy
Attorney	Legal	Authorization Power of Attorney	Third Party Privacy
Courts/Judicial Body	Legal	Other Legal Authority	Third Party Privacy
Law Enforcement Agency	Legal	Authorization Other Legal Authority	Third Party Privacy
Congressman	Congressional	Authorization Other Legal Authority	Third Party Privacy
Veteran Family	Treatment Benefits Other	Authorization Power of Attorney	Third Party Privacy
Social Security Administration (SSA)	Benefits	Authorization Power of Attorney	Third Party Privacy
State Public Health Authority	State Reporting	Other Legal Authority	State Reporting
Coroner/Medical Examiner	State Reporting	Other Legal Authority	State Reporting
Non-VHA Provider (Only Non-Federal) (e.g.: Ambulance)	Treatment Payment	Treatment Authorization Power of Attorney	Third Party Privacy
Other Federal Agency (e.g.: NIH, INS, IHS, IG, DOD)	Treatment Legal Research	Authorization Power of Attorney Other Legal Authority	Third Party Privacy FOIA
Other 3rd Party (e.g.: Organ Network, VARO, funeral homes)	Benefits Other Research	Authorization Power of Attorney Other Legal Authority	FOIA Third Party Privacy

FOIA - Requests for non-individually identifiable data (e.g., manuals, phone directories, etc.).
First Party Privacy (includes POA request) - Requests from individual (e.g., veteran, patient) to whom the record pertains or their personal representative (e.g. guardian, POA).
Third Party Privacy - Requests from anyone whom is NOT the individual or personal representative to whom the records pertain (e.g., insurance company, attorney, courts, etc.).
State Reporting - Request for information pursuant to a State reporting laws (e.g., HIV reporting, cancer registry, communicable diseases, abuse and/or domestic violence reporting, GSW, MVA, etc.).

Creating a New ROI Request

Select the "New" icon **OR**:

Select the New ROI Request… option from the "**File**" pull-down menu.

The "**Create a New ROI Request**" wizard appears.
Enter the first few letters of the patient's last name.
Press the Enter key or select the Search button to locate the patient.

Select the desired patient. Select the Next > button.

To assign a clerk to the request, either remain with the default (your name) or conduct a new search and select a different ROI clerk's name

Select the Next > button.

Choose the Requestor type, Authority for this request, Type of this request and Reason for this request (from the pull-down menus).
Note: See table on back of this Quick Reference Guide

If necessary, change the ROI Request priority from Normal to High.

Select the Next > button.

Search for and select the requestor for the request. If necessary.

- Edit the requestor's demographic information
  Or
- **Add a New Requestor:**

- Select the Add New Requestor button.
- The **Add a new requestor** screen will appear.
- The requestor can fall under three categories to choose from such as:
  - Patient Name
  - Insurance Company
  - Other
- Fill in the appropriate information based on the category selected.

- Select the OK button.

Select the Next > button.

Choose the appropriate check boxes for printing VA Form 10-5345.
Enter request information in the comments area.

Select the Next > button.

If your request is complete, select the Finish button.
If you wish to set the date ranges for your request, select the Next > button and enter the date ranges as necessary.

After selecting finish, the request will display. Select documents requested for release by moving documents from "available documents" column on the left to the "documents to be released" column on the right. You can do this by:

Clicking on the document then drag and drop to the right, or
Clicking on the document then click on " Add selected ", or
Click on "Add All" to select all documentation for release.

Printing a ROI Request

NOTE: A REQUEST MUST BE OPENED TO PRINT.

Select the **Print** icon OR:

From the "File" pull-down menu:

- Select the "Print ROI Request" option.

On the left side of the window, select the **CLOSED** option.
On the right side of the window, choose one of the following options:

- Granted = Request completed - All information requested was provided.
- Partial = Request completed - Only part of the information requested was provided.
- Denied = Request closed - NO information requested was provided.

This will change the status of the request to "**CLOSED**".

The ROI "Print a Request" dialog box will appear.
Select the documents that need to be printed, such as:

- SF544
- Cover Letters
- Delay/Transferal
- Patient Notification
- "Copies of electronic documentation" **must** be selected to print the requested documents

Select the Print button.

The "**Optional Text to Print**" dialog window appears.
Select the appropriate request (s) if necessary.

Select the Ok button.

The "Report Setup" window appears. Here, a user can:

- Select the printer option to print.
- Select the preview option to view.
- Save the file on the computer's floppy or hard disk.

Select the OK button.

Note: By clicking on the Setup button, a user can choose:

- a specific printer or the default printer.
- the paper size and source.
- the paper properties.

Opening an Existing ROI Request

Click on the "Open" icon located on the toolbar OR:

Select Open ROI Request… option from the "**File**" pull-down menu.

The "**Open a Current Request**" window appears.

Select which types of requests you wish to view (pull-down menu):

- **List -** all, open, pending, closed, other non-disclosure, appealed, cancelled, error.
- **Requests -**
  - For a Patient - requires patient identifier (1st 3 letters of last name)
  - Worked by a Clerk - requires clerk identifier (1st 3 letters of last name) .
  - Open or Pending.

Using patient or clerk name, enter at least 3 letters, press <Enter> or select "Search". Search results will display based on the search criteria.

Select the desired patient / clerk name

Select the desired request

Select the OK button to select the request.

or to view Disclosure Summary select Show Acc. of Disclosure Information button.

Editing an ROI Request

From the "ROI Record Manager Today" screen, open an existing request.

Select the Request Information button located on the left side of the tool bar.

The following functions are available

- **Patient and Requestor Information:**
  View Patient and Requestor Information
- **Request Settings:**
  Edit request settings
- **Comments:**
  View comments from form 5345 or add internal comments
- **Edit Date Ranges**
- **Create SF544 form**
- **Show Accounting Disclosure Summary**
  View or Print the Disclosure Summary