DOCUMENT
Storage Systems

An Electronic Medical Record and Document Management Company

Release of Information Manager™

Technical Manual Specifications

Version 5.0

Table of Contents

Introduction

The Release Of Information System (ROI) is a Document Storage Systems, Inc. (GUI) application that is designed to provide health care facilities with an intuitive, user-friendly Windows interface for end-users to use to request patient medical record information.
The ROI Manager is an application that uses "RPC Broker" technology that permits the facility users to retrieve clinical data within the VistA System. The user can work off-line of VistA and only administrator functions will be active. The ROI Manager Encounter System database is linked to the VistA System database that stores registered patient documentation. These databases are "in sync" with each other and reduce data entry time because certain data fields are automatically populated (or filled-in) ensuring data accuracy.

The ROI system tracks requests for privacy act information for patients receiving treatment at VA facilities.

Purpose and Content of this Manual

This document primarily describes the installation procedures, integration agreements, and programmer interfaces currently available.

The VistA portion of this application is installed using normal KIDS installation procedures.

Remote Procedure Calls

Listed on the following pages are the remote procedure calls currently available within the ROI application.

DSIR ADD DOCUMENT

Routine: **NEWITEM^DSIROI0**
This RPC is used to create an entry in file 19620.1 DSIR RELEASED DOCUMENT.

Input Parameter(s):
DATA ARRAY
Input: Array of
   (1): Pointer to DSIR ROI INSTANCE (19620) file
   (2): Internal Set of Codes value for document type
   (3): Document IEN (If applicable)
   (4): Internal Set of Codes value for document media
   (5): Caption
   (6): Document length
   (7): Date/time of document
   (8): Creator of Document: Needs to be a pointer to the NEW PERSON file

Return Value:
Return array consists of one node
 -1 ^ Error message
  1 ^ IEN of new entry in File 19620.1

DSIR ADD/EDIT ROI

Routine: **UPDATE^DSIROI**
Create new or update existing ROI Instance File 19620.

Input Parameter(s):
DATA ARRAY
Input: DATA: Array
 (1): Patient DFN
 (2): Purpose
 (3): ROI Clerk (IFN)
 (4): Requestor (IFN)
 (5): Received Date (FM Format)
 (6): Authority for request (Pointer to 19620.51)
 (7): Type of request (Pointer to 19620.61)
 (8): Requestor type (Pointer to 19620.71)
 (9): **** FUTURE USE ****

(10): Priority (0 - Normal , 1 - High)
(11): Release Drug Abuse Info? (0 - Don't Release , 1 - Release)
(12): Alcoholism Info?
(13): HIV Info?
(14): Sickle Cell Anemia?
(15): Copy of Hospital Summary?
(16): Copy of Outpatient Treatment Notes?
(17): Other info?
(18): Mail to address (Pointer to 19620.92)
(19): Patient address (Pointer to 19620.92)
(20): ROI IEN (Add new if null)
(21): Status (Default to Open if (20) is null)

Return Value:
Return: AXY
Successful Creation/Update: 1^IFN of file 19620
Unsuccessful Creation/Update: -1^Error Message

DSIR CHECK PREV REQ

Routine: **CHECKCUR^DSIROI3**
This RPC checks for previous request for the current patient and
requestor. It then returns an array of entries in file 19620 ROI INSTANCE.

Input Parameter(s):
PATIENT
This is the DFN of the patient.

REQUESTOR
This is the IEN of the requestor in file 19620.12 DSIR NEW REQUESTOR.

Return Value:
Output: Array of:
(1): Number of requests^
(2-n): Status^Date of request^Clerk of record for request^IEN

DSIR CLEANUP

Routine: **CLEANUP^DSIROI2**
This RPC kills global nodes TMP("DSIROI",$J) and TMP("DSIRVAL",$J).

Input Parameter(s):

None

Return Value:

The return value is null.

DSIR CLERKS LIST

Routine: **GETCLRKS^DSIROIR**
This RPC compiles a list of ROI clerks in file 19620 ROI INSTANCE.

Input Parameter(s):
None

Return Value:
Output: Global Array
Clerk Name ^ Clerk IEN (file 200)

DSIR CURRENT STATUS

Routine: **CSTRPC^DSIROI6**
This RPC gets the current status of a request.

Input Parameter(s):
ROI INSTANCE NUMBER
IEN of the entry in file 19620 ROI INSTANCE.

Return Value:
-1 ^ Error Message
Internal Code: Description (example O:OPEN)

DSIR FOLLOWUP REQUIRED LIST

Routine: **GETFOLLW^DSIROI2**
This RPC finds any entries in file 19620 ROI INSTANCE that require a follow up letter.

Input Parameter(s):
None

Return Value:
Output: Array
IEN of entry in file 19620 ROI INSTANCE

DSIR GET ADDRESSES

Routine: **GTADDLST^DSIROI6**
This RPC gets all address know by the RELEASE OF INFORMATION - DSSI for a given patient.

Input Parameter(s):
PATIENT NUMBER
DFN of the selected patient.

Return Value:
Return Array Pieces ^ delimited:
1.   Address File Internal Number - Numeric
2.   Patient - Internal Number ; Patient Name
3.   Street Address Line One - Text 35 character max
4.   Street Address Line Two - Text 35 character max
5.   City - Text 40 character max
6.   State - Internal Number ; Abbreviation
7.   Zip Code - Numeric 5 or 9 numbers
8.   Address Holder - Code ; Description (Patient/Requestor)
9.   Holder - Internal Number ; File Reference ; Holder Name
       (example: "444;DSIR(19620.12,;SMITH,JOHN M")
10.   Begin Date - FileMan Date ; External Date
11.   End Date - same as 10
12.   Street Address Line Three - Text 30 character max

Possible -1 ^ Error Message for invalid input parameter or no address
records found.

DSIR GET AUTHORITY

Routine: **GETAUTH^DSIROI6**
This gets the entries from file 19620.51 DSIR AUTHORITY FOR REQUEST.

Input Parameter(s):
None

Return Value:
Output: Array
IEN (file 19620.51) ^ Description

DSIR GET DOC DATES

Routine: **GETDATES^DSIROI3**
Returns an array of dates for use in screening clinical documents.

Input Parameter(s):
REQUEST IEN
IFN of current ROI request

Return Value:
Output: Array
Line 1: Meds From^Meds To
Line 2: Vitals From^Vitals To
Line 3: Radiology From^Radiology To
Line 4: Immunizations From^Immunizations To
Line 5: Consults From^Consults To
Line 6: Postings From^Postings To
Line 7: Discharge Summary From^Discharge Summary To
Line 8: Prog. Note From^Prog. Note to

DSIR GET DOCUMENTS

Routine: **GETITEMS^DSIROI2**
Get a list of all documents for a request.

Input Parameter(s):
REQUEST IEN
IEN of entry in file 19620 ROI INSTANCE.

Return Value:
Output: Array
IEN (file 19620.1 DSIR RELEASED DOCUMENT) ^

DSIR GET REASONS FOR REQUEST

Routine: **GETREAS^DSIROI6**
Retrieve entries from file 19620.31 DSIR REQUEST REASON.

Input Parameter(s):
None

Return Value:
Output: Array
IEN (file 19620.31) ^ Description

DSIR GET REQUEST TYPES

Routine: **GETTYPES^DSIROI6**
Retrieve entries from file 19620.61 DSIR TYPE OF REQUEST.

Input Parameter(s):
None

Return Value:
Output: Array
 IEN (file 19620.61) ^ Description

DSIR GET REQUESTOR TYPES

Routine: **GETRQTYP^DSIROI6**
Retrieve entries from file 19620.71 DSIR REQUESTOR TYPE.

Input Parameter(s):
None

Return Value:
Output: Array
IEN (file 19620.71) ^ Description

DSIR GET ROIS

Routine: **GETLIST^DSIROI**
This RPC is used to return an array of ROI INSTANCE (File 19620) entries.

Input Parameter(s):

TYPE OF LIST

"P" : Get list by patient
"C" : Get list by clerk
"O" : Get all open or pending requests.
 Defaults to all requests for a given status

STATUS

"A" : Get all requests of a given type
"O" : Get only the open requests of this type
"C" : Closed
"P" :   Pending
"N" : Other Nondisclosures   "denied
"E" :   Entered in error
"X" : Cancelled
"*" : Get all types

PATIENT/CLERK ID
DFN of patient or IEN of clerk.

Return Value:
Output: Array
IEN^Patient Name^External Date Entered^Status^Requestor^SSN^Priority^FMDT

DSIR GET ROUTINE VERSION

Routine: **GETVER^DSIROI2**
This routine will return a major version level and patch level given a routine name where
the routine header is in accepted SAC format.

Input Parameter(s):
DSIRRTN
This is the routine name.

Return Value:
The version and patch level of the routine will be returned in the format:
VERSION ^ PATCH , PATCH , PATCH

DSIR REQUESTS BY DATE

Routine: **BYDATE^DSIROI3**
This broker call returns a list of IEN's that fall between the two dates sent as parameters.

Input Parameter(s):
FROM DATE
FileMan Date

TODATE
FileMan Date

Return Value:
Array of internal entry numbers.

DSIR REQUESTS SINCE DATE

Routine: **GETPREVY^DSIROI2**
This RPC retrieves a list of requests for a given patient since a specified date.

Input Parameter(s):
PATIENT
This is the patient's IFN.

SEARCH DATE
This is the date from which to check, supplied in Fileman internal Date/Time format.

Return Value:
Returns one integer value which is -1 if there was an error, else returns the number of requests the patient has submitted since the date contained in SEARCH DATE.

DSIR RPT BY REQUESTOR

Routine: **BYREQ^DSIROIR**
Retrieves ROI requests for a given date range for use in GUI reports.

Input Parameter(s):
FROM DATE
The FileMan Date to start retrieval process.

TO DATE
FileMan date to end retrieval process.

STATUS

"A" : Get only the appealed requests
"O" : Get only the open
"C" : Closed
"P" : Pending
"ND" : Other nondisclosured
"E" : Entered in error
"X" : Cancelled
"ALL": Gets all statuses

This parameter may be any combination of the single character codes or the word 'ALL'.

CLERK(S)
This is an array of clerk IENs.
(1-n)=IEN to file 200

Return Value:
Return Array ^ delimited
1. Division Name
2. ROI Clerk Name
3. Patient Name
4. Patient SSN
5. Type of Request
6. External Date Received
7. External Date Closed (If present)

DSIR SET DOC DATES

Routine: **SAVEDATE^DSIROI3**
Saves dates for use in screening clinical documents for an ROI request

Input Parameter(s):
REQUEST
IFN of current ROI request

DATE ARRAY
Items in FileMan internal date/time format

1) Medications From ^ Medications To
2) Vitals From ^ Vitals To
3) Radiology From ^ Radiology To
4) Immunology From ^ Immunology To
5) Consults From ^ Consults To
6) Postings From ^ Postings To
7) Discharge Summaries From ^ Discharge Summaries To
8) Progress Notes From ^ Progress Notes To

Return Value:
1^ if successful
-1^error message if unsuccessful

DSIR UPDATE ADDRESS

Routine: **UPDADDR^DSIROI6**
Updates the Address History File 19620.92

Input Parameter(s):
ADDRESS RECORD

Input Record Pieces ^ delimited:
1.   Address File Internal Number - Null to add new record
2.   Patient - Internal Number only (required)
3.   Street Address Line One - Text 35 character max (optional)
4.   Street Address Line Two - Text 35 character max (optional)
5.   City - Text 40 character max (optional)
6.   State - Internal Number (optional)
7.   Zip Code - Numeric 5 or 9 numbers (optional)
8.   Address Holder - 1 character P or R (optional)
9.   Holder Internal Number - Numeric (optional)
10.   Begin Date - Internal FileMan format (optional)
11.   End Date - Same as 10
12.   Street Address Line Three - Text 30 character max (optional)

Optional pieces will not update if null, pass '@' to delete/clear data for specific field. '@'
in patient piece will delete entry in address table for internal number specified in piece 1.

Return Value:
-1 ^ Error message
0 - Entry deleted
Internal Number to address table

DSIR UPDATE STATUS

Routine: **STATRPC^DSIROI6**
Update the Current Status Field 10.05 in file 19620 ROI INSTANCE and create entry in
File 19620.91 DSIR STATUS HISTORY

Input Parameter(s):
ROI INSTANCE NUMBER
1. Request Internal Number
STATUS CODE
2. Status Internal Code

Return Value:
1. -1 ^ Error Message
2. Internal Number to Status History table

Remote Procedure Calls

Name	Description	Tag	Routine	Return Type
DSIR ADD DOCUMENT		NEWITEM	DSIROI0	ARRAY
DSIR ADD/EDIT ROI		UPDATE	DSIROI	SINGLE VALUE
DSIR CHECK PREV REQ		CHECKCUR	DSIROI3	ARRAY
DSIR CLEANUP		CLEANUP	DSIROI2	SINGLE VALUE
DSIR CLERKS LIST		GETCLRKS	DSIROIR	GLOBAL ARRAY
DSIR CURRENT STATUS		CSTRPC	DSIROI6	SINGLE VALUE
DSIR FOLLOWUP REQUIRED LIST		GETFOLLW	DSIRO12	ARRAY
DSIR GET ADDRESSES		GETADDLST	DSIROI6	ARRAY
DSIR GET AUTHORITY		GETAUTH	DSIROI6	ARRAY
DSIR GET DOC DATES	Returns an array of dates for use in screening clinical documents	GETDATES	DSIROI3	ARRAY
DSIR GET DOCUMENTS		GETITEMS	DSIROI2	ARRAY
DSIR GET REASONS FOR REQUEST		GETREAS	DSIROI6	ARRAY
DSIR GET REQUEST TYPES		GETTYPES	DSIROI6	ARRAY
DSIR GET REQUESTOR TYPES		GETRQTYP	DSIROI6	ARRAY
DSIR GET ROIS		GETLIST	DSIROI	ARRAY
DSIR GET ROUTINE VERSION	This routine will return a major version level and patch level given a routine name where the routine header is in accepted SAC format.	GETVER	DSIROI2	SINGLE VALUE
DSIR REQUESTS BY DATE	This broker call returns a list of IEN's that fall between the two dates sent as parameters.	BYDATE	DSIROI3	GLOBAL ARRAY
DSIR REQUESTS SINCE DATE		GETPREVY	DSIROI2	SINGLE VALUE
DSIR RPT BY REQUESTOR		BYREQ	DSIROIR	GLOBAL ARRAY
DSIR SET DOC DATES	Saves dates for use in screening clinical documents for an ROI request	SAVEDATE	DSIROI3	ARRAY

| DSIR UPDATE ADDRESS | UPDADDR | DSIROI6 | SINGLE VALUE |
| DSIR UPDATE STATUS | STATRPC | DSIROI6 | SINGLE VALUE |

Routines

Listed below are the nine routines currently available within the ROI application.

Routines	First Line Description
DSIR October 8, 2002	
DSIRCNV ;AMC -	Document Storage System; ROI conversion routine
DSIRCNV1 ;AMC -	Document Storage System Inc - continuation of conversion routine
DSIROI0 ;DSS/BLJ -	Release Of Information ;03/06/2002 11:22
DSIROI2 ;DSS/BLJ -	Release Of Information ;03/01/2002 14:58
DSIROI3 ;dss/blj -	Release Of Information ;03/01/2002 14:58
DSIROI6 ;AMC -	Document Storage System;ROI
DSIROIR ;DSS/AMC -	Document Storage Systems; ROI Report RPC'S ;03/01/2002 14:58

Exported Options

Listed below are the options currently available within the ROI application.

Options

DSIR ROI MENU OPTIONS   ROI

DSIR PRECONVERSION MENU*   ROI Pre-conversion Menu

DSIR CONVERT ROI AUTHORITY*   ROI Authority Pre-conversion

DSIR CONVERT ROI REASON*   ROI Reason Pre-conversion

DSIR CONVERT ROI TYPE*   ROI Type Pre-conversion

DSIR CONVRT ROI REQUESTOR TYPE*   ROI Requestor Type Pre-conversion

* NOTE: The above marked options are only used at sites where versions less than 5.0 of the Document Storage Systems Inc Release of Information package have been installed.

Integration Agreements

This section will list any and all integration agreements needed by this application.

Callable Routines

None

Menu Options

DSIR MENU OPTIONS

This option is required to be on the secondary menu options for any person requiring access to the Release Of Information – DSSI (ROI) package. It is a broker type option that is needed for the GUI to create context for ROI.

DSIR PRECONVERSION MENU*

This option is a menu type option that is only required for sites who have installed any version less than 5.0 of the ROI Package distributed by Document Storage Systems Inc. It should be assigned to the ROI manager prior to the installation of version 5.0, so that they may set up the following files for conversion:

19603.3 - DSIR ROI REASON
19603.5 - DSIR ROI AUTHORITY
19603.6 - DSIR ROI TYPE
19603.7 - DSIR ROI REQUESTOR TYPE

DSIR CONVERT ROI AUTHORITY*

This option is a run routine that allows the ROI manager to loop through file 19603.5 DSIR ROI AUTHORITY to query the ROI manager for a pointer to the new Authority file.
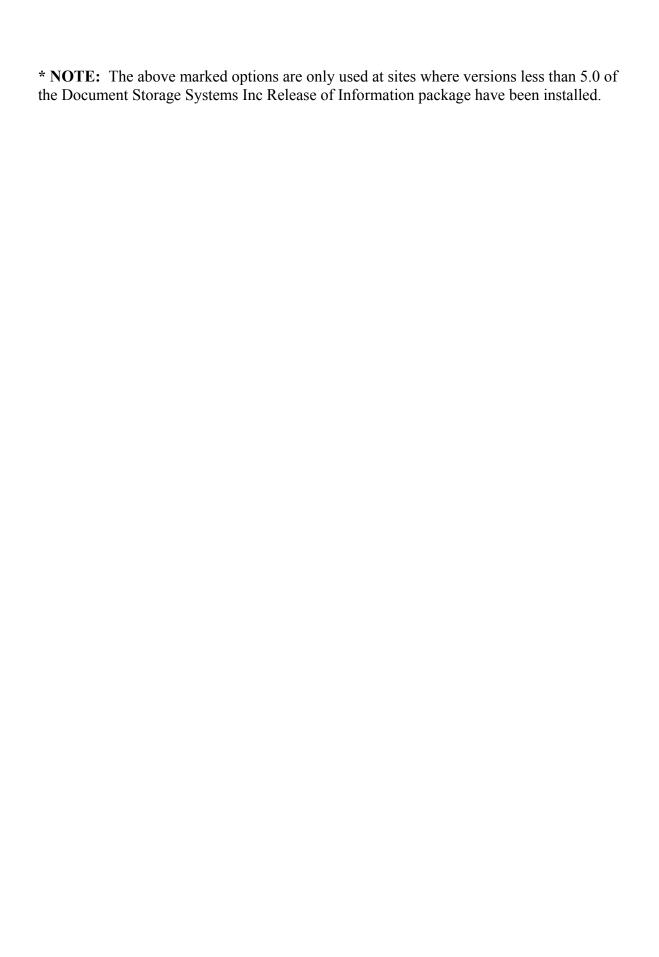
DSIR CONVERT ROI REASON*

This option is a run routine that allows the ROI manager to loop through file 19603.3 DSIR ROI REASON to query the ROI manager for a pointer to the new Reason file.

DSIR CONVERT ROI TYPE*

This option is a run routine that allows the ROI manager to loop through file 19603.6 DSIR ROI TYPE to query the ROI manager for a pointer to the new Type file.

DSIR CONVRT ROI REQUESTOR TYPE*

This option is a run routine that allows the ROI manager to loop through file 19603.6 DSIR ROI REQUESTOR TYPE to query the ROI manager for a pointer to the new Requestor Type file.

* NOTE: The above marked options are only used at sites where versions less than 5.0 of the Document Storage Systems Inc Release of Information package have been installed.

Security Keys

DSIR Supervisor

This key is to be assigned to the ROI manager and any of their designees who may require access to ROI manager features.

Security Guide

Security Management

The following security measures are in place to protect the integrity of the product and databases.

- The directory in which the product files reside is a shared directory with READ only permission to all users. However, within the shared directory only users of the ROI software are provided file permission necessary to WRITE to or CHANGE certain files.
- Menu options are provided to users of the ROI software. Without being assigned the appropriate menu option you cannot log into the ROI software.
- To log into the ROI software you must use your VistA Access and Verify Codes.

Security Features

- **Mail groups and alerts:** There are no specific mail groups or alerts associated with the DSS ROI software however, when requesting information that is associated with a sensitive clinic the user is prompted to send an e-mail to the provider advising him/her of a request for sensitive information and thus seeking his/her approval to release the document.

- **Remote Systems:** The DSS ROI software does not transmit data to any remote system. However, in cases where there are integrated sites using the same VistA system a remote facility would be pulling patient data from the facility where the VistA database resides.

- **Archiving/Purging:** The DSS ROI software does not archive or purge patient data. The VistA database stores all patient information.

- **Contingency Planning.** In the event your VistA System or RPC Broker is down electronically stored information will not be accessible, therefore you can only process requests where the information requested is found in the patients paper medical record.

- **Interfacing:** The DSS ROI product does not have any specialized, non-VA produced, products (hardware and/or software) embedded within or required by the product (e.g., CPT codes, HOST).

- **Electronic Signatures:** The DSS ROI product does not require electronic signatures.

- **Menu Options:** The DSS ROI product requires users to have certain menu options assigned. There is one menu option for regular ROI end users DSIR ROI MENU OPTIONS and two additional menu options for supervisory personnel DSIR ROI RUN REPORT and DSIR ROI CANNED REPORTS.

- **Security Keys:** DSIRROI SUPERVISOR - There is one security key associated with the DSS ROI software. The security is provided to supervisory personnel responsible for performing administrative functions within the Release of Information software. The administrative functions are ROI Sensitive Clinic ID, Letter Editor, Facility Data, Billing Setup and Database Maintenance.

- **File Security:** File security is maintained from within VistA.

- **References:** There are no regulations, VHA manuals, directives or any other reference material that relate to this product other than RFQ 776-02-067 and Statement of Work.

- **Official Policies:** The RFQ 776-02-067 and the Statement of Work addresses any software modifications and distribution of the product.