DOCUMENT
Storage Systems

An Electronic Medical Record and Document Management Company

Release of Information Manager

Administrative Manual

Version – 5.0

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Introduction

Our Company

DSS specializes in the computerization of patient medical charts. Our core specialty within the medical network environment is building Windows GUI (Graphical User Interface) applications that insert, update and retrieve patient data that is held in an M (Mumps) data repository or SQL database system. DSS' array of GUI products allow for electronic documentation of progress notes and other significant parts of medical records, scanning and viewing of clinical and administrative documents and automated medical record coding through simple points and clicks.

Product Description

The Release of Information Manager (ROI Manager) 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.

Navigational Method

Navigating through ROI is accomplished through use of an icon bar located on the left-hand side of the screen similar to Microsoft Outlook. The user must click on an icon within the icon bar to access a ROI Manager function. All ROI Manager icons are "VistA specific" icons. These icons are organized into two categories: Patient Documentation and Request Information. To access these, the end-user clicks on the respective gray button on the left-hand side of their screen after the end-user has either created a new ROI request or opened an existing ROI request. There are also functions available on the menu bar at the top of the ROI Manager screen and short cuts to these are located on the tool bar right below. When an end-user clicks on the word File or Documents or Help on the menu bar, a drop-down window of available functions will appear.

How to Access ROI Administrative Options

The Release of Information Administrative options are contained and managed through the **Administrator** bar located on the left side of the ROI Record Manager window.

To Access the ROI Administrative options from your computer desktop:

- Using your mouse, double-click on the **ROI** icon .

- A "Connect to" window will appear in which to log on to.

- Click on the pull-down arrow to view the various **broker** or **test servers** to choose. This will determine what type of production or test account you will be logging on to.

Note: Speak with your supervisor or administrative personnel in order to choose which type of server access (production or test account) is necessary.
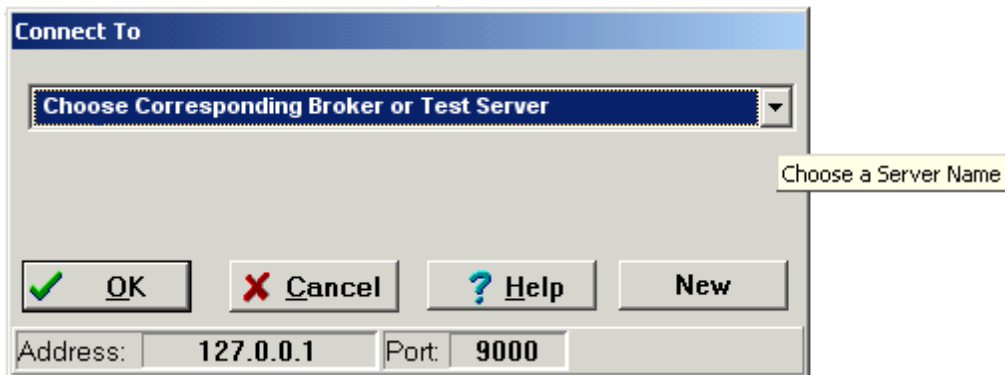
- Choose the proper broker server or test server.

- Click on the **OK** button.

After Selecting the Vista Account, a **Vista log on** screen will display.
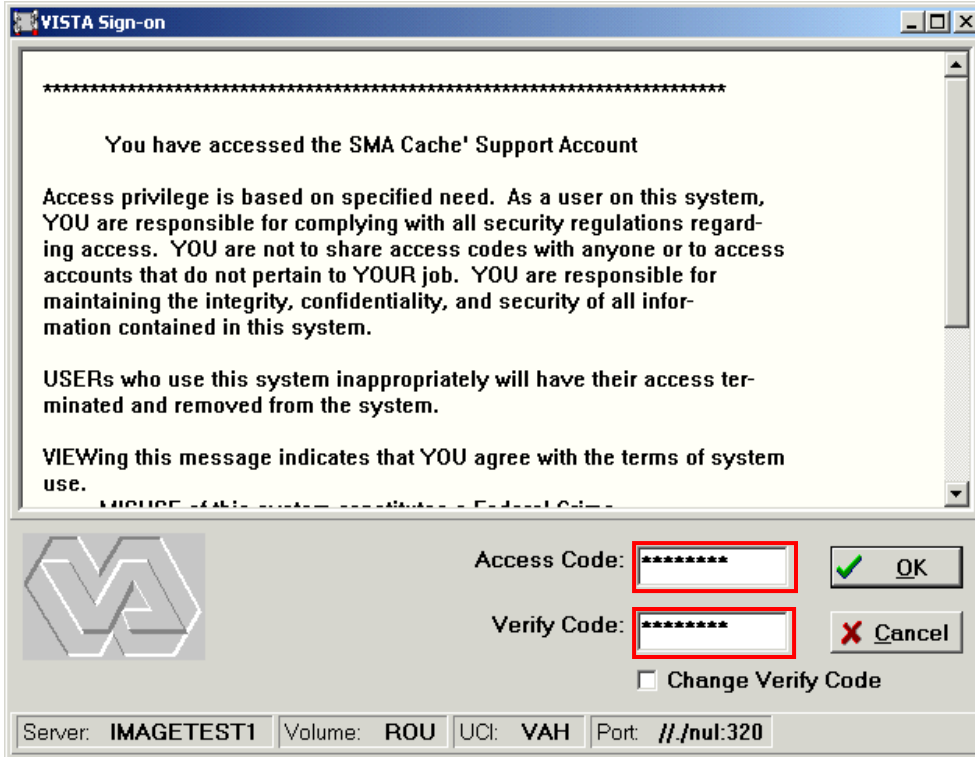

Logging on to the system requires the following four steps:

- Enter your VistA Access Code.
- Press the tab key to move your cursor to the Verify Code field.
- Enter your Verify Code.
- Click on the **OK** button or press the Enter key.

The ROI Record Manager screen appears. Note that the **Administrator** button is located on the left side of the screen (illustrated on the following page).

In order to access the Administrative options, click on the **Administrator** drop-down menu located at the top of the screen. There are 4 features within this section.
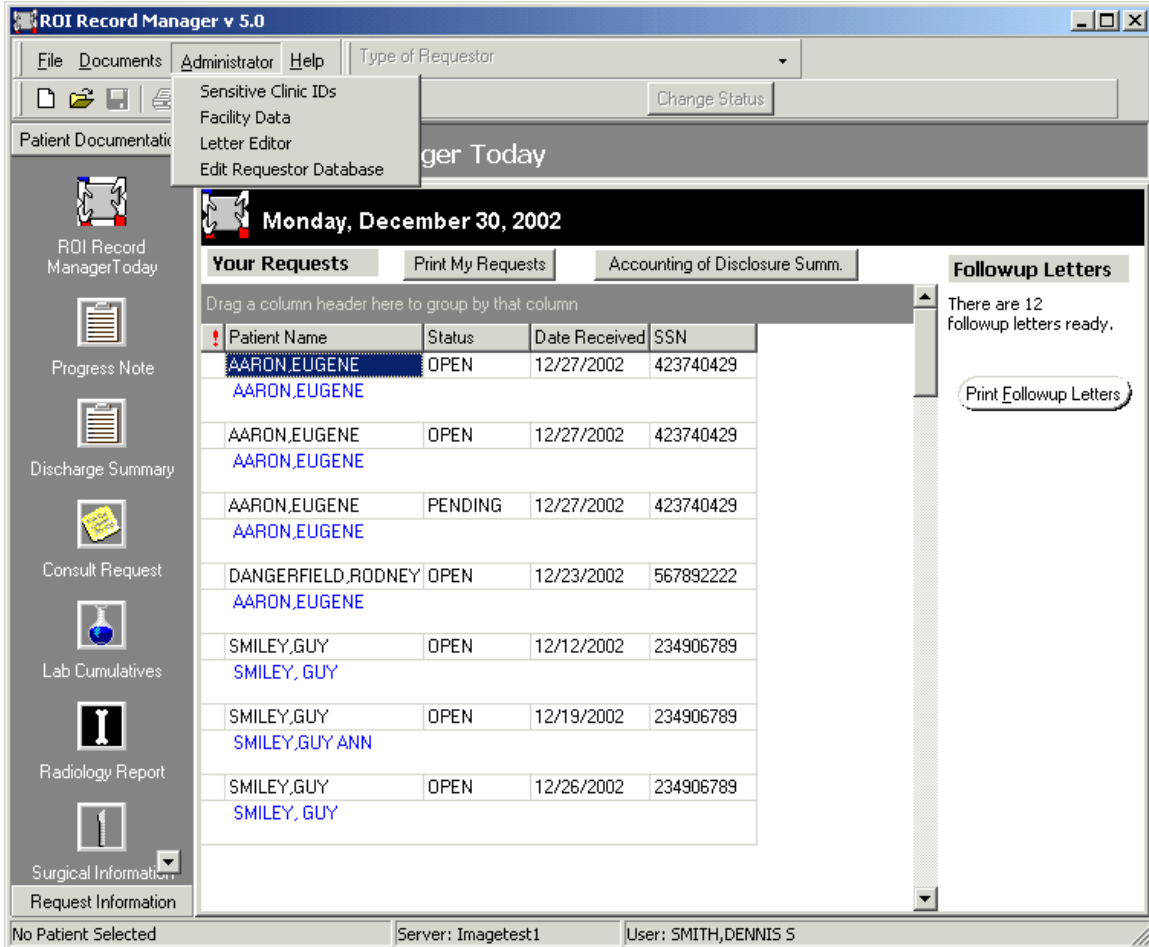
Sensitive Clinics IDs - Identify clinics which may contain sensitive information/documentation.

Facility Data- Add new divisions (facilities); edit existing facility information.
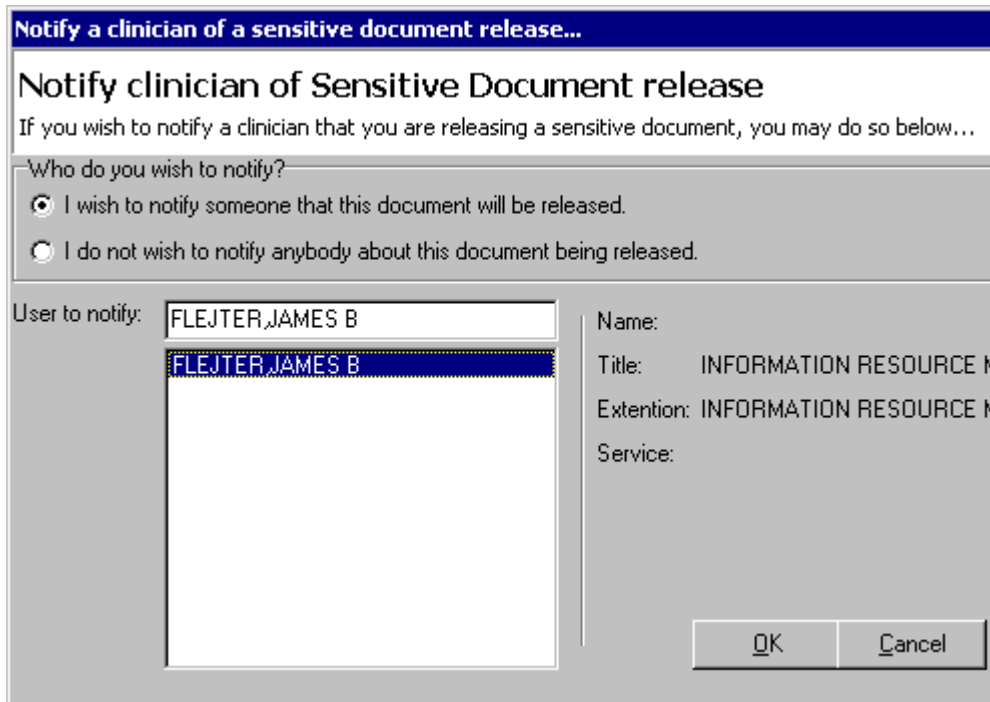
Letter Editor - Create additional cover letters.

Edit Requestor Database- View/edit requestor data.

Sensitive Clinic ID

This option allows you to add/delete sensitive clinic locations to ROI Manager. When a document associated with a Sensitive Clinic, is selected for release the following Confirmation screen is displayed to the ROI Clerk.
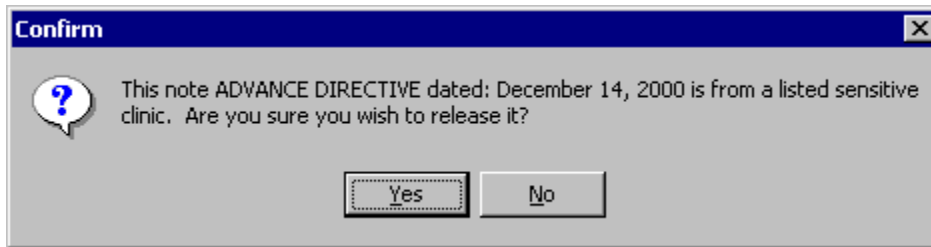
- Clicking on **Yes**, will present the user with the option to notify the provider, via e-mail, of the request for release of the sensitive document.

Enter the providers name into the text area and press enter.
- Clicking on **OK** to sends the notification to the provider.

Adding a New Sensitive Clinic

This option allows you to add/delete sensitive clinic locations to ROI Manager. When a document associated with a sensitive clinic is selected for release, a confirmation screen will be displayed to the ROI Clerk.

To add a sensitive clinic:

- Click on the **Administrator** pull-down menu. Choose the Sensitive Clinic IDs option.
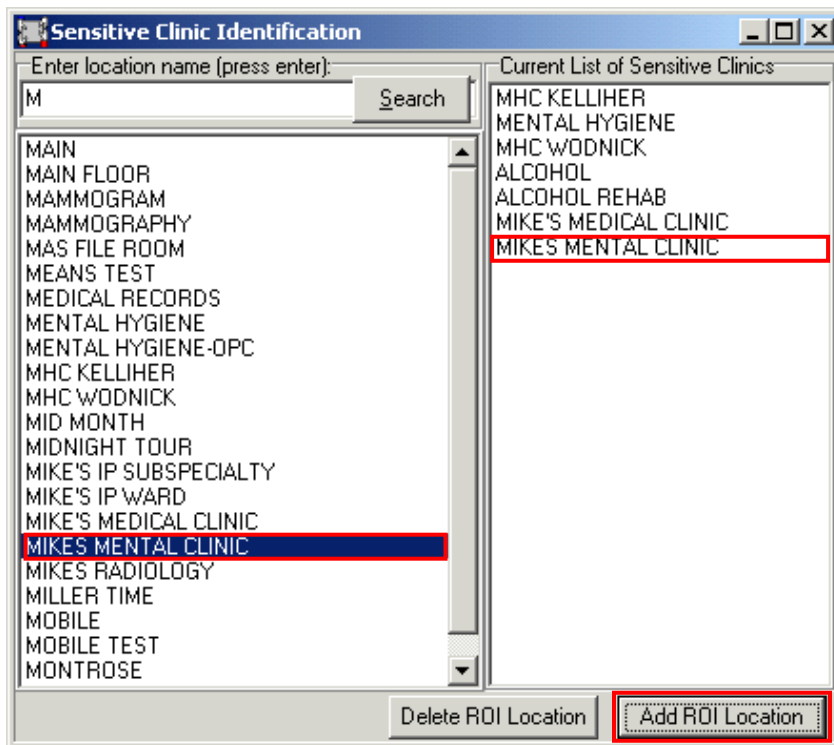

- Type the name of the clinic in the **Enter location name** search box.

- Press the **Enter** key or click on the **Search** button. A listing of available ROI locations will appear in which to choose from.

- Click on the ROI location you are identifying as a sensitive clinic.

- Click on the **Add ROI Location** button. The location is now added to the list of sensitive clinics.
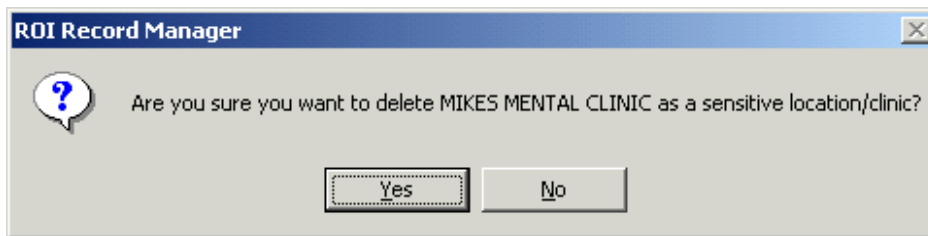
Deleting a ROI Sensitive Clinic Location

From the sensitive clinic titles listed under **Current List of Sensitive Clinics**:

- Using your mouse, click and select the sensitive clinic title to be deleted.
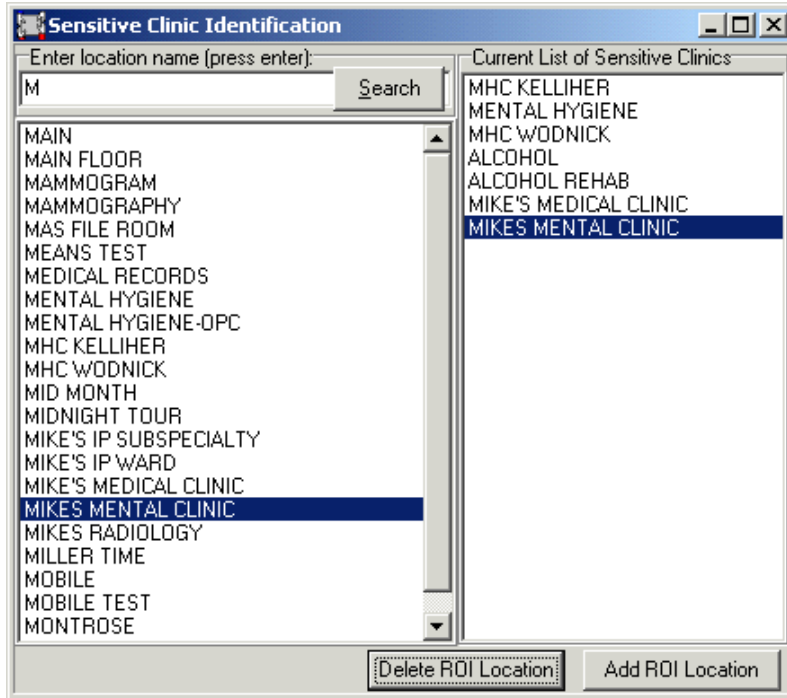
- Click on the **Delete ROI Location** button. A small pop-up window will appear to confirm the deletion.

Clicking on the **Yes** button will remove the location from the list.

Facility Data Editor

Facility Data Editor Screen

The Facility Data feature allows the administrator to edit the demographic information of the facility for ROI Manager. The facility data entered on this screen will appear on correspondence generated by the ROI package.

Editing a Facility

- Using your mouse, click on the **Administrator** pull-down menu located on the top of the screen. Choose the **Facility Data** option. A screen will appear with demographic information that is grayed out.

- Click on the pull-down arrow located to the right of the division list box.

- From the list that appears, select the division to edit.

- Click on the **Edit this Facility** button. All of the text boxes (or fields) now appear on the screen (as illustrated below).

- Place your mouse in the appropriate window and highlight the information that you want to change.

- Add new data or edit the existing information.

- Click on the **Save Updates** button.

- A pop-up window will appear to confirm the update.

There are two print features on the **Facility Data Editor** screen that are accessed by clicking radio buttons. These features are:
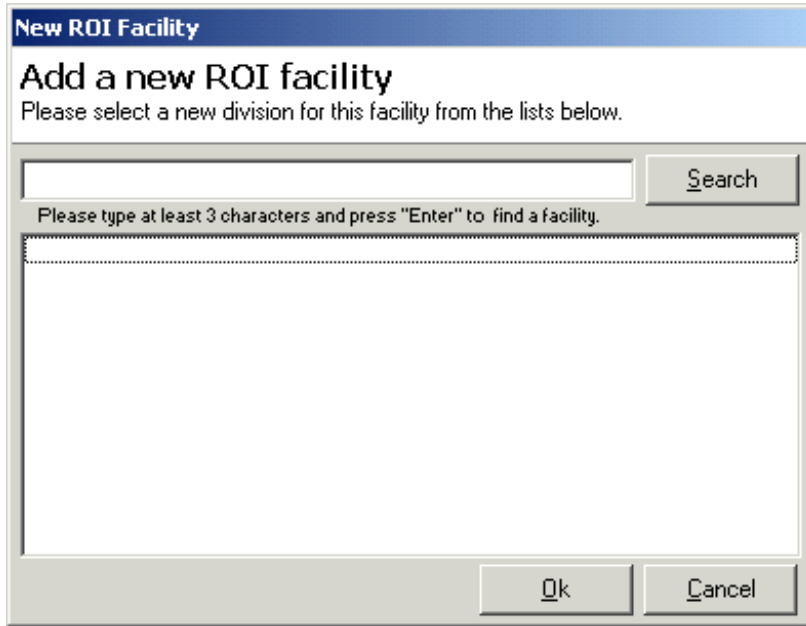
- "Auto print follow up letters". If this option is selected, then follow up letters are automatically generated.

- "Require DSIR SUPERVISOR key to print ROI reports in ROI Manager". This option is used to determine if a supervisor key is required to print reports.

   Note: Always click on the **Save updates** button to save any changes.

Adding a New Facility

To add a new facility:

- Click on the [Add a new facility] button. The following screen will display.

Enter at least three characters (of the facility name) in the division search box and press Enter.

From the search results list:

- Click on the Facility Name to be added. Click on the **OK** button.

The Facility Data Editor screen will re-display.

- Click on the drop down arrow located on the right side. Select the facility to be edited.

- Click on the **Edit this facility** button.

- Enter the facility data into the appropriate text boxes/fields.

- Click on the [Save updates] button.

Letter Editor

To access the Letter Editor feature, click on the Administrator pull-down menu located on the menu bar. Choose the Letter Editor option. This feature provides administrators the ability to:

- Creating new letters.
- Editing letters.
- Deleting existing letters.
- View/change properties for existing letters.
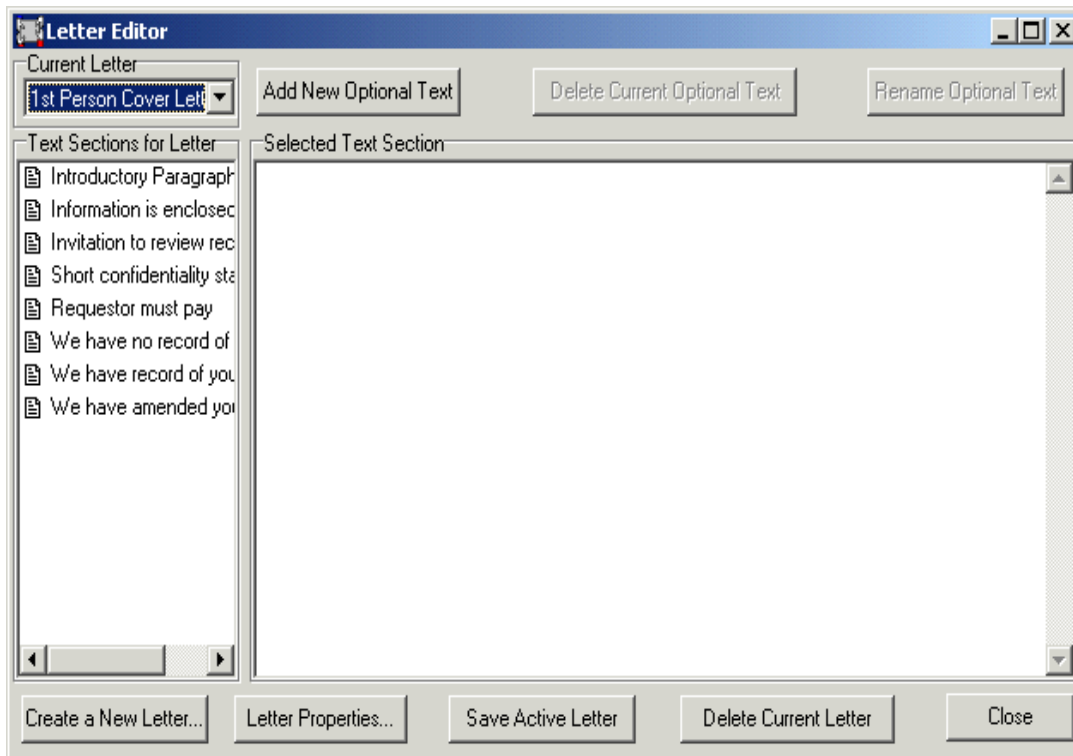
Creating a New Letter

- Click on the **Create a New Letter** button. An **Add a New ROI Letter wizard** screen will appear.
- Click on the **Next** button to continue.
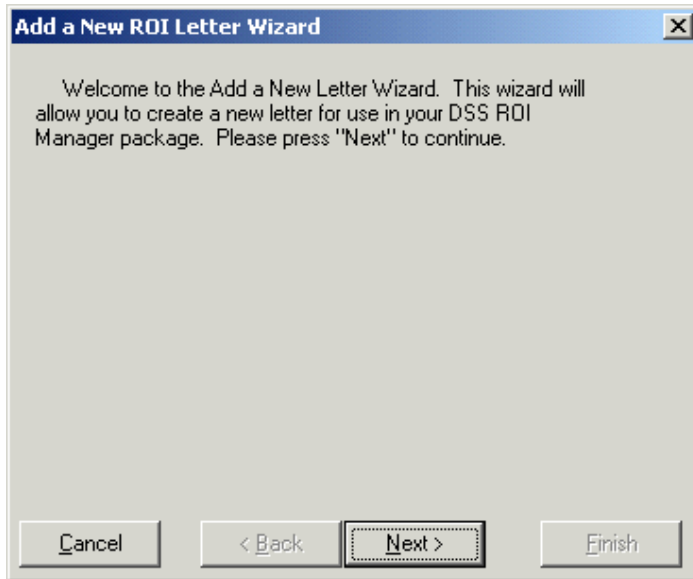
- Enter a letter name in the text box.
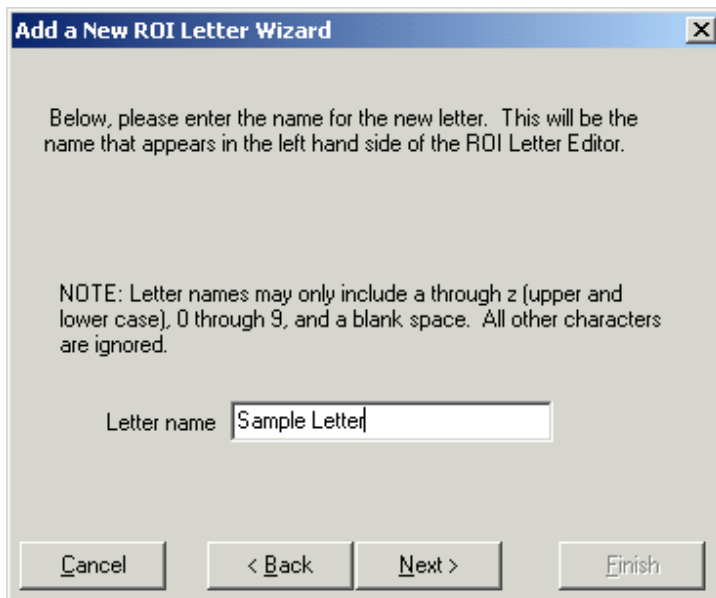
- Click on the **Next** button.
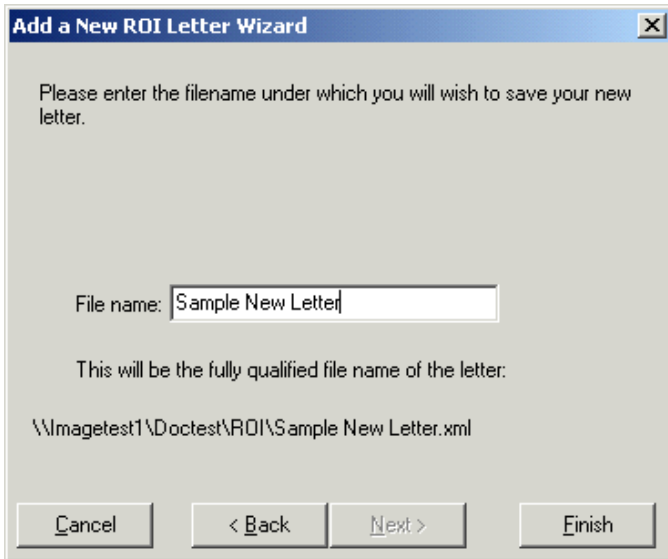
- As the file name is entered, the path where the file is stored automatically appears on the screen.
- Click on the **Finish** button.

Letter Editor Screen

This is the main screen of the letter editor, which allows you to create, edit, and delete letters.

Adding text to the Introductory Paragraph

To add text:

- Click on Introductory paragraph under "**Text Sections for Letter**".
- Place your mouse within the selected text section and start typing.
- Users can also paste a document into this section.
- Using your mouse, click on the **Save Active Letter** button.
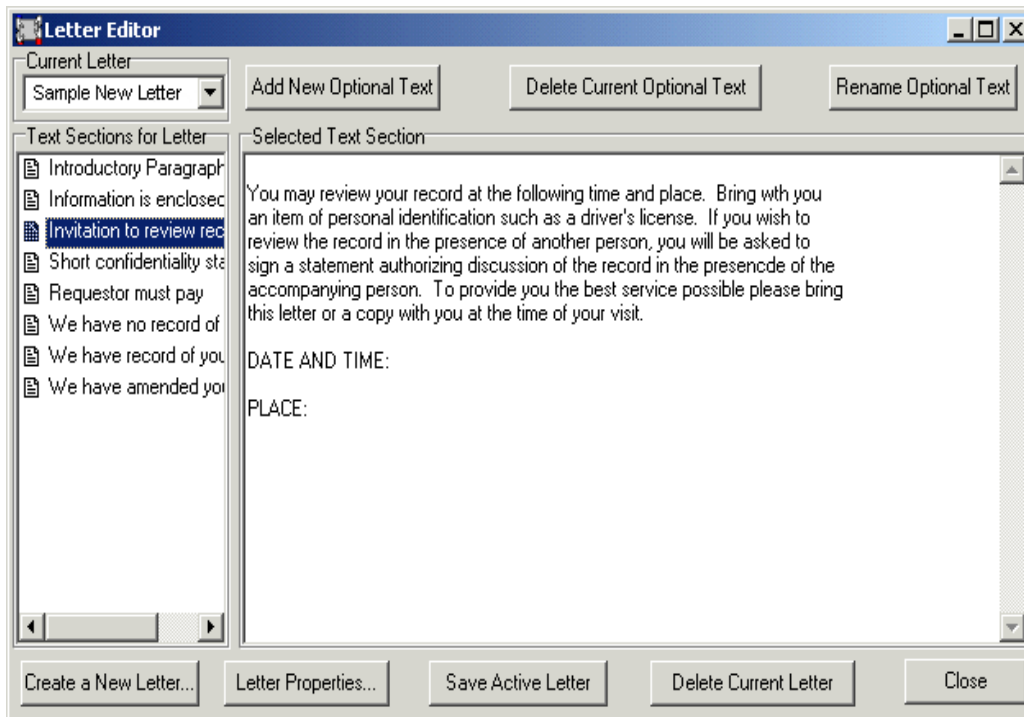
Adding New Optional Text

This feature will allow ROI supervisors to pre-define or create optional text sections for individual letters. Once they are created, users will have the ability to select specific letters and the associated optional text when releasing or printing the requests.

To add a new optional text section:

- Click on the **Add New Optional Text** button. The following screen appears:
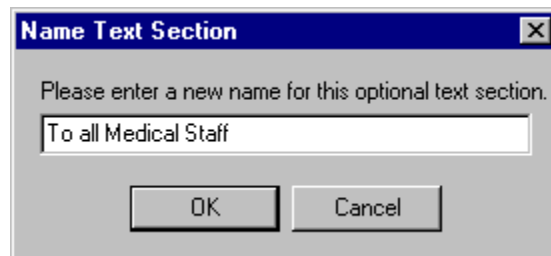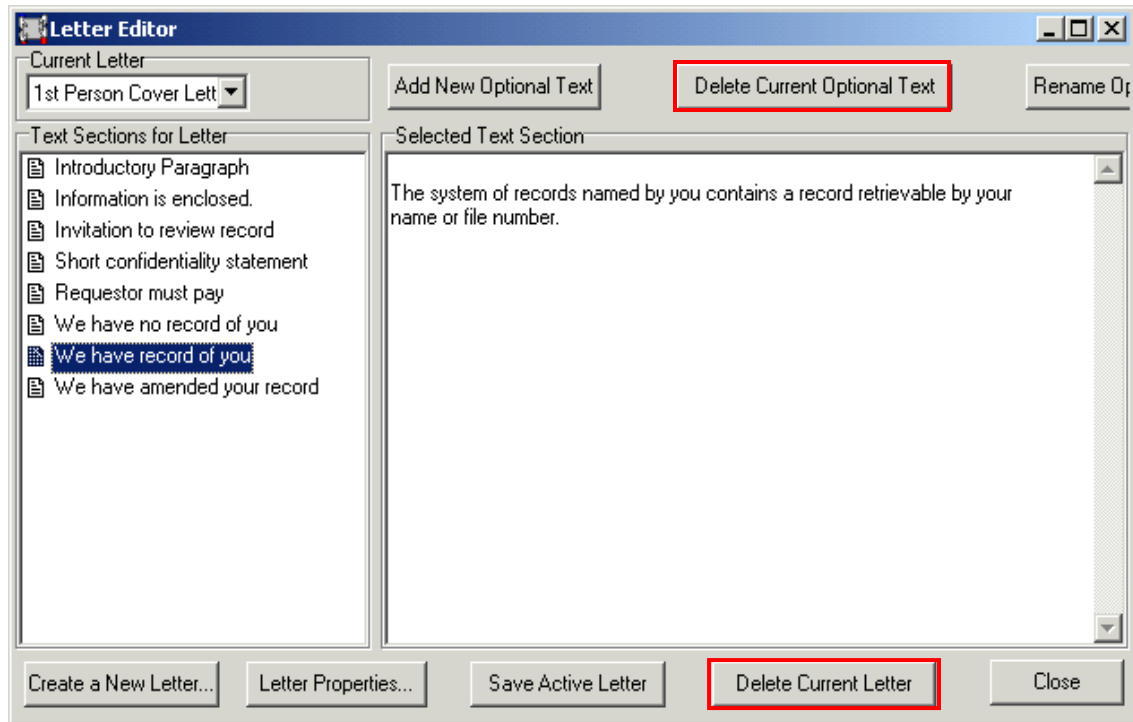

To add text to the Optional Text Section:

- Click on the text heading you have created under "**Text Sections for Letter**".
- Using your mouse, place your cursor within the selected text section and start typing.
- Users can also paste a document into this section.
- Using your mouse, click on the **Save Active Letter** button.

Delete Current Optional Text or Current Letter

To delete the current optional text or current letter:

- Selected the letter or text you wish to delete.
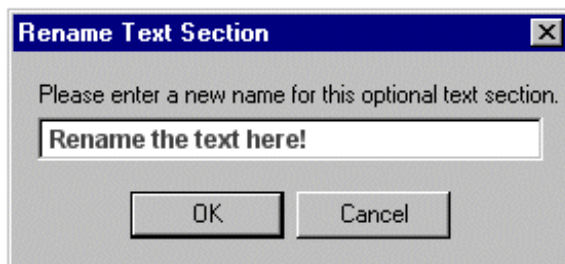- Click on the **Delete Current Optional Text** button or the **Delete Current Letter** button.

Note: Users must delete optional text sections and the introductory paragraph independently. All items cannot be selected at once.
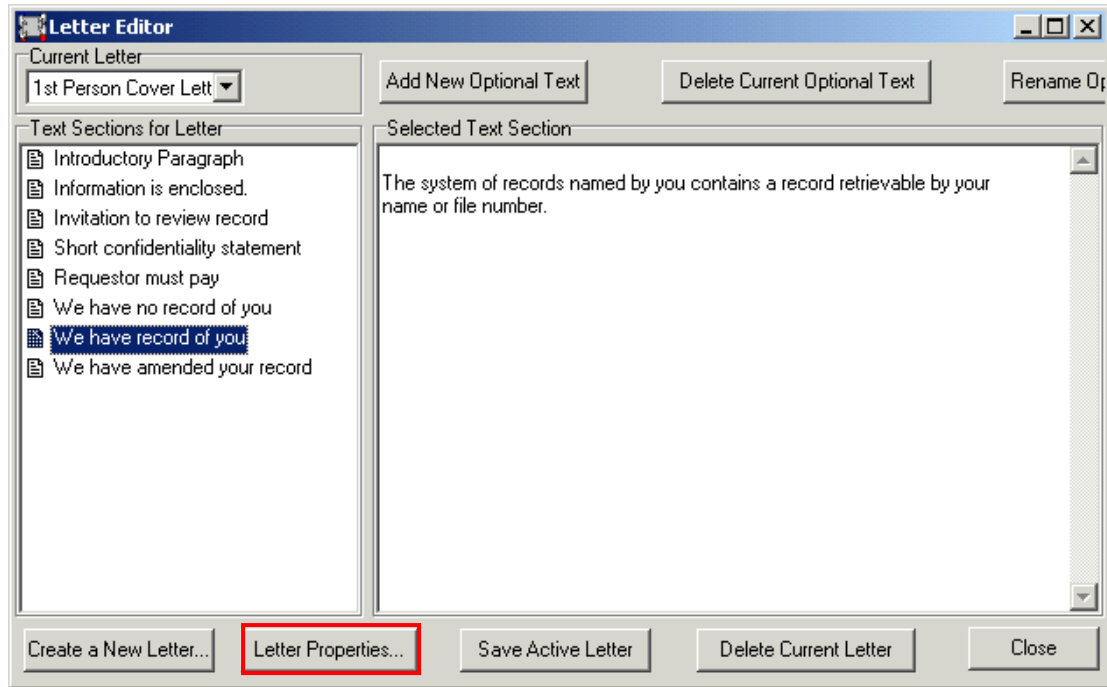

Rename Optional Text
To rename optional text:

- Click on the **Rename Optional Text** button. The **Rename Text Section** dialog box appears.
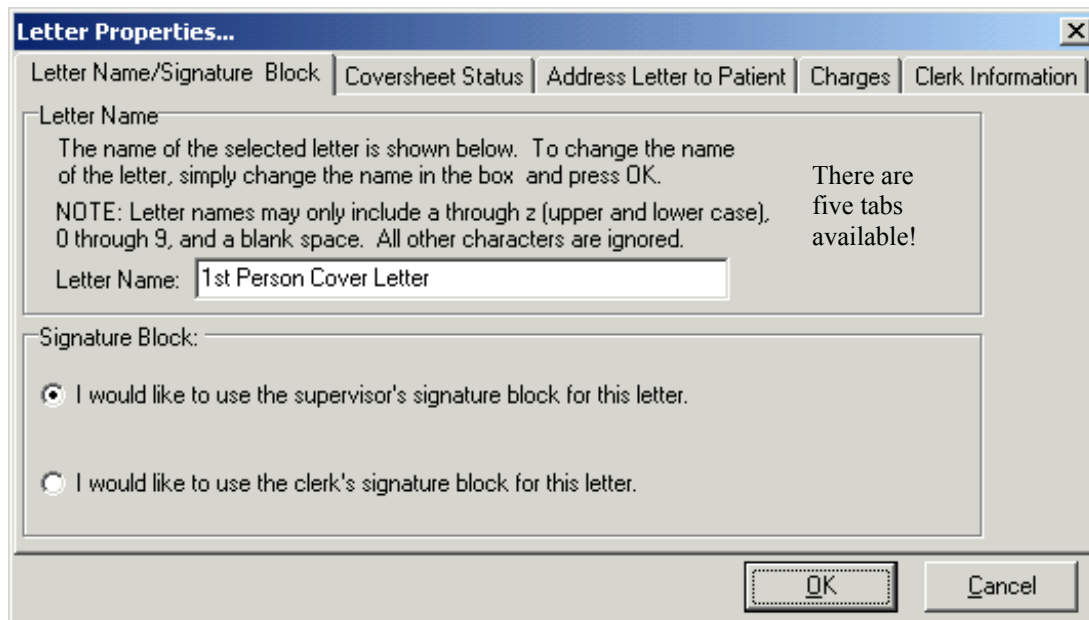

- Type in the new name for the optional text section.
- Click on the **OK** button when finished.

Letter Properties

The **Letter Properties** option has five tabs. Click on the **Letter Properties** button to access the five tabs.

The **Letter Properties** screen appears as illustrated below.

Letter Name/Signature Block – Select this tab to change the name of Name of the letter. Users can also select which signature block will appear on the letter (supervisor or clerk).

To change the letter name:

- Using your mouse, highlight the current letter name and type in the new letter name
- Press the **Enter** key or click on the **OK** button.

To select the option for the signature block:

- Click on the appropriate radio button and click on the **OK** button**.**

Coversheet Status – displays the cover sheet status and allows users to change the status by clicking the appropriate radio button.

To Change the coversheet status:
- Click on the appropriate radio button. Click on the **OK** button.
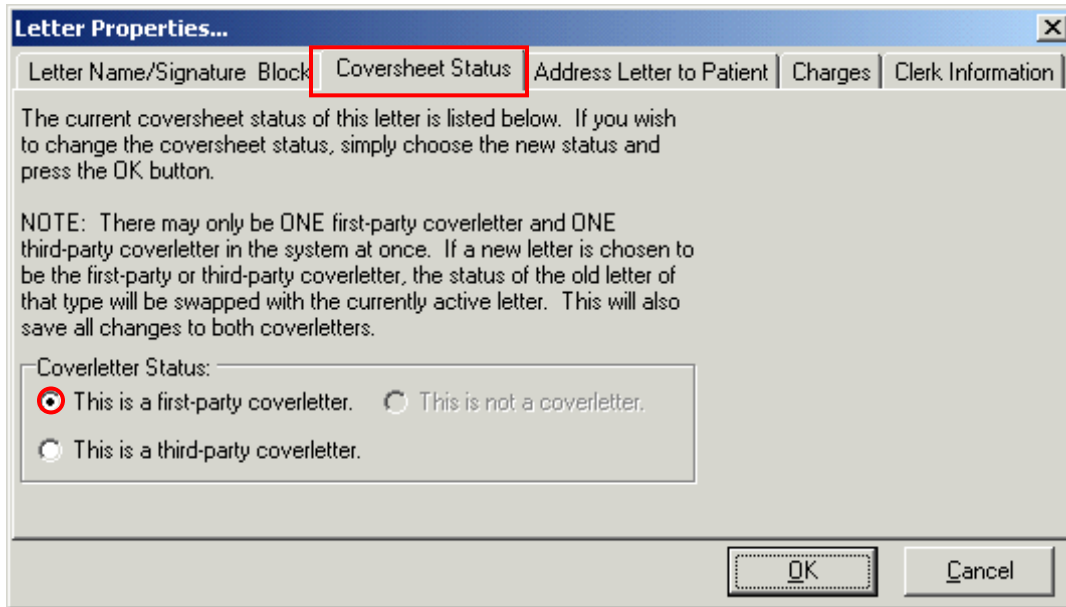
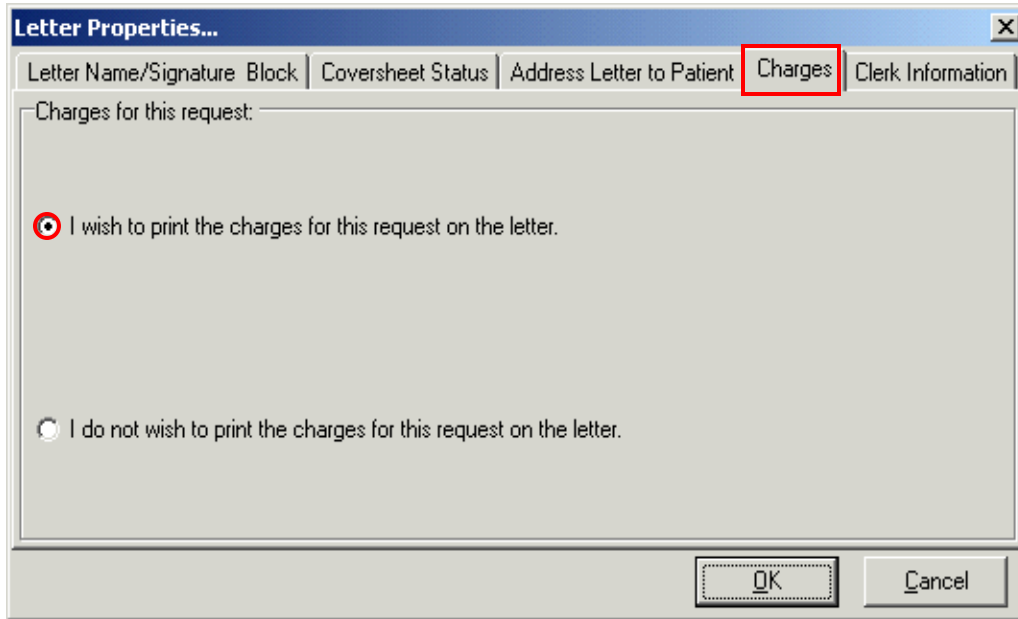**Address Letter to Patient**- if chosen, the selected letter will print addressed to the patient. The patient does not have to be the requestor.
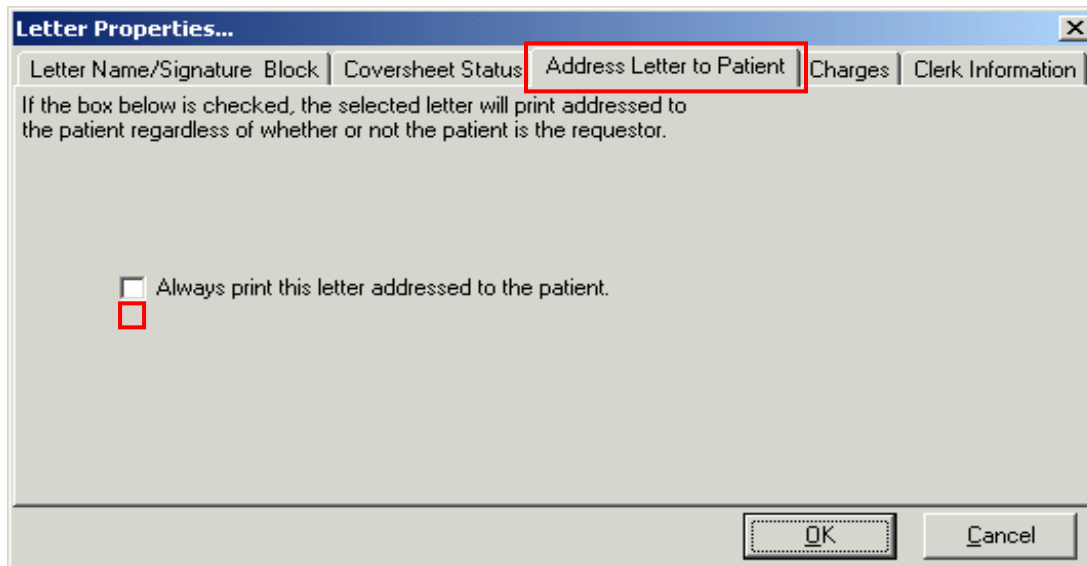
To designate the selected letter:

- Click on the **Always print letter addressed to the patient** radio box.
- Click on the **OK** button.

Charges - The user can select to have the billing charges either to print or not to print on the letter.

Clerk Information –These options determine how to print clerk data on a letter. Users can:

- Print the clerk's full name at the bottom of the letter.
- Leave any clerk information off at the bottom of the letter.
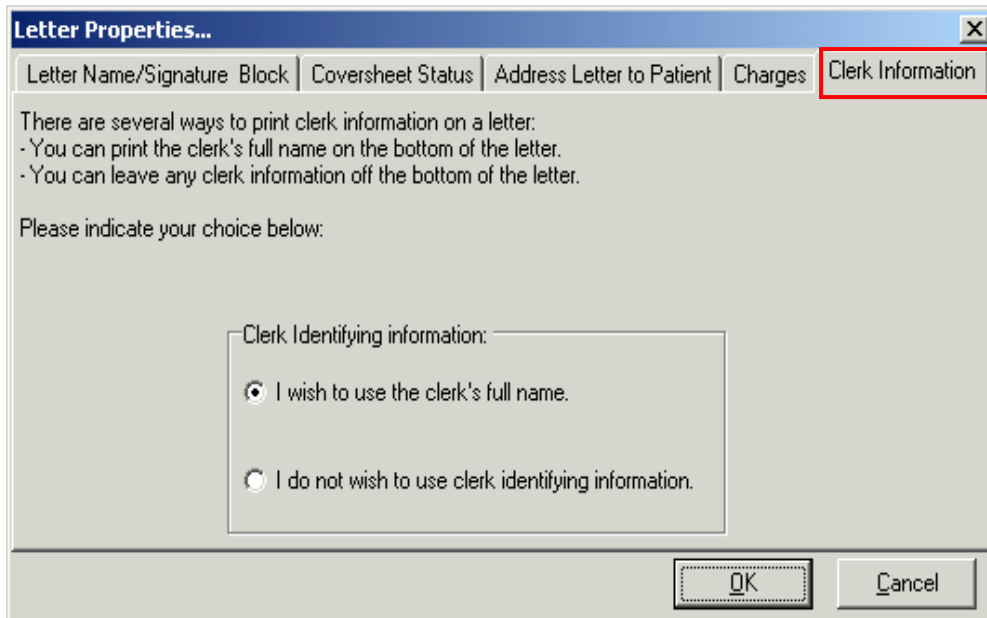
- Determine the clerk's identifying information, then click on the radio button.
- Click on the **OK** button.

Edit Requestor Database

The Edit Requestor Database option allows the administrator to edit the requestor database. To access this option, click on the Administrator drop-down menu and choose the Edit Requestor Database.
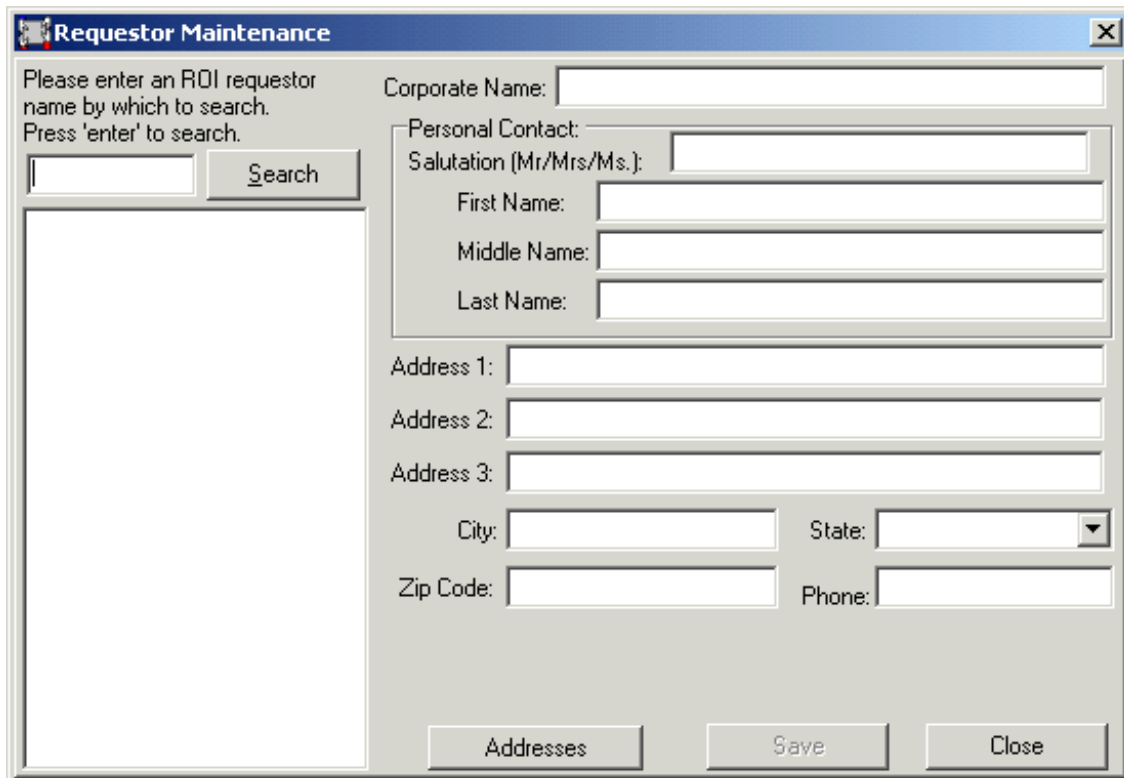

Editing Requestor Files

To edit the Requestor information within the requestor file:
- Enter the requestor name in the search text box. Press the Enter key or click on the search button.
- Click on the requestor name (from within the search results listed below). Demographic information pertaining to selected requestor will display on the right hand side of the screen.
- Tab to or place the cursor in the appropriate text box. Enter/edit data as necessary.
- Click on the Save button.

Glossary

CPRS

Computerized Patient Record System or CPRS is a Veterans Health Information Systems and Technology Architecture (VistA) computer application. CPRS enables you to enter, review, and continuously update all information connected with any patient. You can order lab tests, medications, diets, radiology tests and procedures, record a patient's allergies or adverse reactions to medications, request and track consults, enter progress notes, diagnoses, and treatments for each encounter, and enter discharge summaries.

FOIA

Abbreviation for Freedom Of Information Act.

Icon

An icon is a graphical representation (picture) of the purpose of a specific software application usually with words underneath it to describe the name of the application. End-users click on icons to access specific applications.

ROI Manager Encounter System

A database created by DSS that is linked to the VistA System database that stores registered patient documentation.

ROI Manager

The Release of Information Manager (ROI Manager) 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.

VistA

The Department of Veterans Affairs overall database. The database is written and driven by an "M" language interpreter. The database has many tables within it that the user interacts with traditionally in a terminal emulation environment.