**24 October 2019**

Referral Table

for the MHS Mart (M2)

(Version 2.02.00)

Current Specification

**Revision History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Originator** | **Para/Tbl/Fig** | **Description of Change** |
| 1.00.00 | 10/27/2007 | W. Funk |  | * Original posting |
| 1.01.00 | 5/12/2008 | W. Funk | * Table 1 | * Added Appointment Date and Date Appointment Made |
| 1.02.00 | 1/13/2011 |  | * Section III * Table 1 | * Clarification of MEPRS4 Code of Referring Provider and MEPRS3 Code Referred to * Replace EI/DS with DHSS |
| 1.03.00 | 2/4/2011 | W. Funk |  | * Changed the name of Referral FY and Referral FM |
| 1.04.00 | 3/5/2012 | K. Hutchinson for W. Funk | * Section III * Table 1 | * Added Pseudo Person ID * Indicated Person ID visible only in the restricted universe. |
| 1.05.00 | 2/16/2012 | J. MacLeod | * Table 1 | * Removed the TBD and “Not Yet Populated” from the Appointment Date and Date Appointment Made variables. * Changed the length of the Order Number variable from 8 to 12. * Changed the length of the Appointment Type variable from 11 to 10. |
| 1.06.00a |  | K. Hutchinson for J. MacLeod | * Section III | * Number of Referrals set to 1 per record. |
| 1.06.00 | 4/4/2013 | K. Hutchinson for J. MacLeod | * Section III | * Modified ACV Group for ACV R and V |
| 1.06.01 | 2/21/2014 | W. Funk | * Table 1 | * Added referral DMISID |
| 1.06.02 | 6/19/2015 | W. Funk | * Table 1 | * Added UIN and Network Referral Indicator |
| 1.06.03 | 9/30/2015 | W. Funk | * Section II | * Updated record selection rules |
| 1.06.04 | 6/03/2016 | W. Funk | * Table 1, Table 2 | * Changed source of Treatment DMISID, and renaming of DMISID fields |
| 1.06.05 | 12/19/2016 | W. Funk | * Table 1 | * Added “T3” wording to applicable region fields * Added Appointment Request Status * Formatting Adjustments to Table 1 |
| 1.07.00 | 08/18/2017 | B. Ross for W. Funk | * Section III * Table 1 | * Hid region text * Added new fields related to NDAA and region transition |
| 1.07.01 | 11/27/2017 | W. Funk | * Table 1 | * Changed name of referring MTF region fields |
| 2.00.00 | 10/8/2018 | W. Funk | * Entire document | * Added MHS Genesis content. |
| 2.01.00 | 3/15/2019 | T. Comer for W. Funk | * Table 2 | * Changed field name and SAS name for activity\_type field to orderable\_mnemonic |
| 2.02.00 | 10/23/2019 | T. Comer for W. Funk | * Table 1 * Table 2 | * Added MHS GENESIS variable, refer\_to\_appt\_made\_dt\_tm, to Date Appointment Made field * Minor adjustments of M2 Names * Addition of Catchment, Enrollment, PRISM, and Referring DMIS ID Market fields |

# Referral Table for the MHS Mart (M2)

1. **Data Source:** MDR Referral File (legacy) and MDR Genesis Referral File
2. **Record Selection:** Two files are provided to M2 each month, an add file and a delete file.
   * The “delete file” contains only the referring host (for Genesis sites, the host is populated as “GEN”) and the record ID of records that are to be deleted when loading the M2. These deletion records are only associated with records that have been previously sent to M2 and would only cover the current year + 5 additional historical years as required.
   * The “add file” contains all new records, and all changed records from the previous version of the MDR Referral File for the current year + 5 additional historical years.
3. **Table (Object Class) Information in M2:** Health Care Services/Referrals. (All years in one data table representing referrals from the current year back through 5 historical years.
4. **Rules for Preparing M2 Feed from MDR:** . All records are included when preparing the initial referral feed for M2, after applying de-duplication rules. Thereafter, selection rules for the add/delete files are:
   * + Delete File: Include records (referring host/GEN + Refnum) that have changed or cancelled since previous submission to M2 (M2 Change Flag of “A” (Adjustment) or “C” (Cancellation)).
     + Add File: All new records meeting the criteria for M2 and all records where any value in any field in M2 has changed in the MDR since the previous submission to M2 (M2 Change Flag of “N” (new) or “A” (adjustment)).
5. **Update process:** To update the M2 referral table; first use the delete file to delete changed records. Then append the add file. It is critically important that the steps occur in that order. The first time that the M2 is loaded with referral data, there will only be an add file.
6. **File Layout:** The file layouts provided to M2 are described in Table 1. The files are pipe (|) delimited.

**Table 1: M2 Referral Feed Layout**

| **M2 Name** | **Format** | **SAS Name from CHCS file** | **SAS Name from Genesis file** | **Processing Rule/Comments** |
| --- | --- | --- | --- | --- |
| Record ID | $12 | refnum | order\_sk | No transformation |
| Person ID | $10 | edi\_pn | edipn | No transformation. Visible only in the restricted universe |
| Sponsor ID | $9 | sponssn | sponssn | No transformation. Visible only in the restricted universe |
| Person Association Reason Code | $2 | parc | parc | No transformation |
| Sponsor Service Aggregate | $1 | sponsvc | sponsvc | No transformation |
| Referral Type | $1 | reftype | N/A | No transformation |
| Referring Host DMISID | $4 | chcshost | N/A | No transformation for CHCS data. Set to “GEN ” for Genesis data. |
| Referring DMISID | $4 | dmisid | refer\_from\_loc\_mtf | No transformation |
| HCDP - Enrolled | $3 | deershcdp | hcdp | No transformation |
| ACV | $1 | deersacv | acv | No transformation |
| Enrollment Site | $4 | deersenr | denrsite | No transformation |
| Patient Category Code | $3 | patcat | N/A | No transformation |
| Beneficiary Category | $3 | bencatx | bencat | No transformation |
| Ben Cat Common | $1 | comben | comben | No transformation |
| Beneficiary Zip Code | $5 | patzip | patzip | No transformation |
| Referral Date | YYYYMMDD | refdate | order\_dt\_tm | No transformation for CHCS data.  Take date component of order date and time for Genesis data and convert to character format (YYYYMMDD). |
| FY | $4 | reffy | fy | No transformation |
| FM | $2 | reffm | fm | No transformation |
| Status | $2 | status | refer\_to\_appt\_stat\_legacy | No transformation |
| Referral Time | $5 | reftime | order\_dt\_tm | No transformation for CHCS Data. Take time component of order date and time for Genesis data and convert to character format (HH:MM). |
| Referring Clinic MEPRS Code | $4 | cln | refer from loc\_meprs cd | No transformation |
| Order Number | $12 | ordnum | order\_sk | No transformation |
| Referral Start Date | 8 | begdate | requested\_start\_dt\_tm | No transformation for CHCS data.  Take date component of requested start date and time for Genesis data and convert to character format (format as YYYYMMDD). |
| Referral End Date | 8 | enddate | N/A | No transformation. YYYYMMDD |
| Number of Visits Authorized | 2 | visits | N/A | No transformation. Enable aggregation. |
| Access to Care Category | $1 | atc\_cat | N/A | No transformation |
| Referred to MEPRS Code | $4 | poc | refer\_to\_loc\_meprs\_cd | This value may be shown as the first 3 characters of the clinic MEPRS code for MTFs that have not transitioned to MHS Genesis. |
| Referring provider ID | $14 | ref\_prov | refer\_from\_prov | Set length to 14 in M2, but feed will only contain 9 characters initially. |
| MEPRS4 Code of Referring Provider | $4 | refbyprv\_meprs | N/A | No transformation |
| Refusal Reason | $2 | refusrsn | N/A | No transformation |
| Refusal Status | $1 | refusstat | N/A | No transformation |
| Requested Appointment Type | $11 | req\_appttype | N/A | No transformation. Hidden field. |
| Appointment Type | $10 | appttype | refer\_to\_appt\_type\_legacy | No transformation. |
| Associated Record ID | $10 | apptien | sch\_appt\_sk\_sea | No transformation |
| Referring NPI, Type 1 | $10 | TBD | refer\_from\_prov\_npi | No transformation. Hidden field. |
| Referring NPI, Type2 | $10 | TBD | N/A | No transformation. Hidden field. |
| Appointment Date | YYYYMMDD | apptdt | refer\_to\_appt\_dt\_tm | No transformation for CHCS data. Take date component of appointment date and time for Genesis data and convert to character format (YYYYMMDD). |
| Date Appointment Made | $8 | apptmddt | refer\_to\_appt\_made\_dt\_tm | No transformation. YYYYMMDD format. |
| UIN | $17 | UIN | order\_sk | No transformation. |
| Network Referral Indicator | $1 | ref\_to\_mcsc | net\_ref | No transformation. |
| Appointment Request Status | $28 | apptreqstat | N/A | No transformation. |
| Enrollment Group | $3 | enr\_grp | enr\_grp | No transformation |
| Eligibility Group | $3 | elg\_grp | elg\_grp | No transformation |
| Enrollment PCM Type | $1 | pcm\_type | pcm\_type | No transformation |
| Beneficiary T17 Region | $2 | ben\_reg\_t17 | ben\_t17\_reg | No transformation. |
| Beneficiary T3 Region | $2 | ben\_reg\_t3 | ben\_t3\_reg | No transformation |
| Enrollment Site T17 Region | $2 | enr\_reg\_t17 | enr\_t17\_reg | No transformation. |
| Enrollment Site T3 Region | $2 | enr\_reg\_t3 | enr\_t3\_reg | No transformation |
| Referring DMIS ID T3 Region | $2 | ref\_mtf\_t3 | mtf\_t3\_reg | No transformation. |
| Referring DMIS ID T17 Region | $2 | ref\_mtf\_t17 | mtf\_t17\_reg | No transformation. |
| ACV Group | $15 | acvgroup | acvgroup | No transformation in M2. In MDR, when preparing the M2 feed map PR to Prime, DP to Desig Prov, OP to Overseas Remote, PL to Plus, O to Other and R to Reliant |
| Age Group | $1 | agrgrp | agegrp | No transformation |
| Referring EDIPN | $10 | N/A | refer\_from\_prov\_edipn | No transformation. Visible only in the restricted universe |
| Date of Birth | $8 | patdob | patdob | Format as YYYYMMDD |
| Referring Encounter Type GENESIS | $30 | N/A | enc\_type\_enc | No transformation |
| Encounter Type GENESIS | $30 | N/A | refer\_to\_enc\_type | No transformation |
| FIN GENESIS | $40 | N/A | financial\_nbr | No transformation |
| Referred to Appointment FIN GENESIS | $40 | N/A | refer\_to\_financial\_nbr | No transformation |
| Referred to PowerInsight Encounter ID GENESIS | 8 | N/A | refer\_to\_encounter\_key | No transformation |
| Referred to Millennium EncounterID GENESIS | $10 | N/A | refer\_to\_encounter\_sk | No transformation |
| Gender | $1 | patsex | gender | No transformation |
| HCDP – Assigned | $3 | hcdp\_assgn | hcdp\_assign | No transformation |
| Medicare Eligibility | $1 | medicare\_fl | medicare\_flag | No transformation |
| MRN GENESIS | $20 | N/A | mrn | No transformation |
| Genesis Flag | $1 | N/A | N/A | Set to 1 if record is from MHS Genesis, Else set to 0. |
| Appointment Status GENESIS | $20 | N/A | refer\_to\_appt\_stat | No transformation |
| Appointment Type GENESIS | $15 | N/A | refer\_to\_appt\_type | No transformation |
| Referring Unit Location | $60 | N/A | refer\_from\_loc\_unit\_display | No transformation |
| Referred to Nurse Unit Loc Code GENESIS | $60 | N/A | refer\_to\_loc\_unit\_display | No transformation |
| CY | $4 | cy | cy | No transformation |
| CM | $2 | cm | cm | No transformation |
| Order Status GENESIS | $24 | N/A | last\_order\_status\_o | No transformation |
| Refer to Specialty GENESIS | $40 | N/A | refer\_to\_specialty\_od | No transformation |
| Orderable Mnemomic GENESIS (formerly Activity Type) | $30 | N/A | orderable\_mnemonic (formerly activity\_type) | No transformation |
| Completed Date | YYYYMMDD | N/A | completed\_dt\_tm | Take date component of completed date and time for Genesis data and convert to character format (YYYYMMDD). |
| Completed Time | $5 | N/A | completed\_dt\_tm | Take time component of completed date and time for Genesis data and convert to character format (HH:MM) |
| Defer to Network Reason | $40 | N/A | defer\_to\_network\_reason\_od | No transformation |

Table 2: M2 Derived Fields

| **M2 Data Element** | **Processing Rule/Comments** |
| --- | --- |
| Psuedo Person ID | Encrypted version of person ID |
| Pseudo Sponsor ID | Encrypted version of sponsor ID |
| Number of Referrals | Count of rows retrieved in a query |
| Enrollment Site Name | Match Referral data to the M2 DMISID Index Table by FY and Referring DMISID to retrieve the required data element. If no match found, leave blank. See DMISID Index specification for more information. |
| Enrollment Site Command |
| Enrollment Site Parent |
| Enrollment Site DHP Code |
| Enrollment Site Military Service |
| Enrollment Site MSMA |
| Enrollment Site Readiness Service |
| Enrollment Site Readiness Parent |
| Enrollment Site Base Market Code |
| Enrollment Site Expanded Market Code |
| Enrollment Site Market Name |
| Enrollment Site Reporting Market Code |
| Enrollment Site Reporting Market Name |
| Enrollment Site Type of Market Code |
| Enrollment Site Type of Market Name |
| Catchment Area Command | Match Referral Data to DMISID Index table by DMISID and FY to retrieve the required data element. If no match found, leave blank. See M2 DMISID index Specification for more information. |
| Catchment Area Military Service |
| Catchment Area MSMA |
| PRISM Area Command |
| PRISM Area Military Service |
| PRISM Area MSMA |
| Catchment Area Name |
| PRISM Area Name |
| MTF Service Area Name |
| Enrollment Site Parent Name |
| PRISM Area Readiness Service |
| PRISM Area Base Market Code |
| PRISM Area Expanded Market Code |
| PRISM Area Market Name |
| PRISM Area Reporting Market Code |
| PRISM Area Reporting Market Name |
| PRISM Area Type of Market Code |
| PRISM Area Type of Market Name |
| Catchment Area Readiness Service |
| Catchment Area Base Market Code |
| Catchment Area Expanded Market Code |
| Catchment Area Market Name |
| Catchment Area Reporting Market Code |
| Catchment Area Reporting Market Name |
| Catchment Area Type of Market Code |
| Catchment Area Type of Market Name |
| Beneficiary Name | Restricted Universe Only. Concatenate first name and last name. |
| Beneficiary Last Name | Restricted Universe Only. From M2 MPI file merge by person ID |
| Beneficiary First Name | Restricted Universe Only. From M2 MPI file merge by person ID |
| Number of Appointment Referrals | Set to the row count when the appointment ID number is not null. |
| MEPRS3 Code of Referring Provider |  |
| MEPRS2 Code of Referring Provider |  |
| MEPRS1 Code of Referring Provider |  |
| MEPRS2 Code Referred To |  |
| MEPRS3 Code Referred To |  |
| MEPRS1 Code Referred To |  |
| Referring Clinic (MEPRS3 Code) |  |
| Referring Clinic (MEPRS2 Code) |  |
| Referring Clinic (MEPRS1 Code) |  |
| Ever Deployed Flag (OCO) | Match to CTS by pseudo person ID if the referral date is between the CTS begin and end dates. If no match, set to N, else set to Y. |
| OCO Deployed Flag | Match to CTS by pseudo person ID if the referral date is between the CTS begin and end dates. If Deployment Record Flag = “D”, set to ‘Y’; else (including if no matching record) set to ‘N’. |
| Days Since Most Recent OCO Depl (Dimension) | Match to CTS by pseudo person ID if the referral date is between the CTS begin and end dates. If Deployment Record Flag = ’D’ then set to 0.  If Deployment Record Flag = “B” set to referral date – CTS begin date. If no matching record set to 0. |
| Days Since Return from OCO Depl (Measure) | Match to CTS by pseudo person ID if the referral date is between the CTS begin and end dates. If Deployment Record Flag = ’D’ then set to 0.  If Deployment Record Flag = “B” set to referral date – CTS begin date. If no matching record set to 0. |
| Cumulative OCO Days | Match to CTS by pseudo person ID if the referral date is between the CTS begin and end dates. If Deployment Record Flag = ”D” and Cumulative OCO Deployed Days is null then set to referral date – CTS Begin Date;  Else if Deployment Record Flag = “D” then set to Cumulative OCO Days Deployed + (referral Date – CTS Begin Date);  Else if Deployment Record Flag = “B” then set to Cumulative OCO Days Deployed;  If no matching record, set to null. |
| Referring DMIS ID Name | Match to the DMIS ID Index Table for Referring DMIS ID and FY and retrieve the selected fields. If no match, leave blank. |
| Referring DMIS ID Command |
| Referring DMIS ID DHP Code |
| Referring DMIS ID Military Service |
| Referring DMIS ID MSMA |
| Referring DMIS ID Parent |
| Referring DMIS ID Parent Name |
| Referring DMIS ID Readiness Service |
| Referring DMIS ID Readiness Parent |
| Referring DMIS ID Base Market Code |
| Referring DMIS ID Expanded Market Code |
| Referring DMIS ID Market Name |
| Referring DMIS ID Reporting Market Code |
| Referring DMIS ID Reporting Market Name |
| Referring DMIS ID Type of Market Code |
| Case Manager ID 1 | Match to the Case Management File by pseudo person ID and fill with the required data element if the referral data is between the begin and end date of the reported care management record. See Case Management Spec for more information |
| Case Manager ID 2 |
| Case Manager ID 3 |
| Case Management DMISID |
| Case Management Acuity Level |

**Table 3: File Layout and Transformation Rules for M2 “Delete” Feed**

| **Variable Name** | **SAS Name from CHCS File** | **SAS Name from Genesis File** | **Format** | **M2 Derivation** |
| --- | --- | --- | --- | --- |
| Record ID | refnum | Order\_sk | $11 | No transformation. |
| Referring Host DMISID | chcshost | N/A | $4 | No transformation for CHCS data. Set to “GEN ” for Genesis data. |

1. **Refresh Frequency**

Frequency of updates: Weekly

1. **Quality Review**

Routine operating procedures should involve performing quality review, both in the preparation of the M2 feed and in the loading of the M2 file. A minimum set of quality review requirements are described below. DHSS is encouraged to perform additional quality review.

* Except for the first load of M2, there should always be a delete file.
* The first 10 records of both the add file and the delete file should be visually inspected to ensure the layout conforms to the specification.
* Frequency tabulations should be prepared for Beneficiary Category, ACV, Access to Care Category, and other key variables. Differences in distributions of key variables should be discussed at bi-weekly operational meetings.
* The MDR will provide frequency tabulations in the transmittal notice with each update. These should be compared to frequency tabulations from M2 after applying the feed. There should be no discrepancies.
* The number of records deleted during monthly processing should match the record count in the delete file.
* The size of the Referral File should increase each month.
* The results of joins should be visually inspected. The M2 should be tested to ensure records are not lost in joins (at least initially).