PMR Process: VSR Checklist

Trainee Handout

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Objectives

* Identify which private medical release (PMR) requests in VBMS did not go through Centralized Mail to the PMR contractor for processing.
* Apply the steps in PMR Process: VSR Checklist.

References

* [**M21-1, Part III. Subpart iii.1.C.7.a. Exhibit 2 PMR Process VSR Checklist**](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/)
* [**Private Medical Record (PMR) Retrieval Program Home Page**](http://vbaw.vba.va.gov/bl/21/systems/pmr.htm)

Topic 1: Identify PMR Requests which need to go to the PMR Contractor

PMR requests not received automatically through the Centralized Mail (CM) program:

* + VA Forms 21-4142 and 21-4142a received through Veterans On-Line Application (VONAPP) Direct Connect (VDC),
  + eBenefits uploads,
  + and non-standard medical release forms.

In these instances, the developing VSR will need to follow the steps in PMR Process: VSR Checklist. This ensures that the private medical release request forms will get processed by the PMR contactor.

When you open a VA Form 21-4142 in VBMS, review the image of the form. If it has no obvious stamp that it was sent for PMR processing and if no responses or letters are in VBMS from the PMR contractor for that form, review if it was received from eBenefits or VDC. Click Document Properties, to further review. When the Document Properties pane opens, look at the Source (bottom left hand corner) to determine if the form is from VDC or eBenefits.

Non standard medical release requests

* Some hospitals/private providers do not accept *VA Form 21-4142* to release patient private medical records, they require their own release.
* When a claimant submits a non-standard medical release request to support a VA claim, it does not go through Centralized Mail to the PMR contractor.
* These releases will need to be identified in VBMS, and the steps on the PMR Process VSR Checklist need to be followed.

When you see a non standard medical release form in VBMS and it is complete and in need of development, it needs to be submitted to the PMR contractor for processing. Non standard forms do not automatically get sent for PMR processing by Centralized Mail.

Topic 2: PMR Process: VSR Checklist

Location of PMR Process: VSR Checklist

The PMR Process:VSR Checklist is found at <http://vbaw.vba.va.gov/bl/21/systems/pmr.htm> and at [M21-1, Part III. Subpart iii.1.C.7.a. Exhibit 2 PMR Process VSR Checklist](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/)

When the medical release request, which requires processing, has not been sent to the PMR contractor through Centralized Mail, the steps on the VSR Checklist should be followed.

PMR Process: VSR Checklist Steps 1-3

1. Review VA Form 21-4142 or other medical release forms in VBMS to determine if they have been developed. If they have been developed no further PMR action is needed. If they have not been developed proceed to the next step.
2. Review the VA Form 21-4142, VA Form 21-4142A or other medical release form for claimant signature and signature date on the signature line in the Centralized Mail Portal. Review the VA Form 21-4142 or other medical release form to determine if it is for a private health care provider located in the United States. If the VA Form 21-4142 is not signed and dated, or if the form is not for a private health care provider then do not submit to the PMR contractor.

NOTE - The signature on the VA Form 21-4142 or other medical release form has to be the patient’s signature, unless the patient is a minor or has a legal representative to sign medical releases for them. If a legal representative, then the paperwork authorizing the signature should be submitted to the PMR contractor, DOMA, as well as the medical release request.

1. Update Share BIRLS Inquiry with date of birth, SSN, and other identifying information.

NOTE - The step to update Share Birls Inquiry with the information listed is a **critical step**. If the PMR contractor cannot confirm information in the Share system that they are reviewing on the medical release request, then they may not be able to process the form. Ensure that this step is not skipped.

PMR Process: VSR Checklist Steps 4 - 6

1. Ensure that all applicable fields of VA Form 21-4142 are accurately identified. Mandatory fields required for PMR Program submission include: claimant signature, signature date, Veteran’s name, name of private health care provider, and address of private health care provider (city and state).

NOTE: The PMR contractor can process a medical release request even if not all fields are completed. However, there are a minimal number of fields that are required, which are listed above.

**Step 5 below is critical.** Naming conventions must be followed in order to provide the required information to the PMR contractor. Failure to follow the naming conventions may result in the contactor’s inability to process the form.

1. Identify the VA Form 21-4142, VA Form 21-4142A or other medical release forms which meet PMR Program submission criteria. Save with the following naming convention:

Last name of claimant\_last four of claim number\_6 digit current date

For example: Larson\_1121\_052014

If multiple 4142s are received, save with the following naming convention:

Last name of claimant (# of release)\_last four of claim number\_6 digit current date

For example: Larson(2)\_1121\_052014

If the VA Claim number or Veteran’s SSN are both missing from the 21-4142 or other release, download and save with the following naming convention:

Last name of claimant\_full claim number\_6 digit current date

For example: Larson\_444441121\_052014

If VA Form 21-4142 requires a VA Form 21-412A submission and they are two separate documents, ensure that both documents are downloaded with the following naming convention:

Last name of claimant(A)\_last four of claim number\_6 digit current date

For example: Larson(A)\_1121\_052014

Save VA Form 21-4142, VA Form 21-4142A or other medical release requests to a secure folder.

Attachment A:

Please see color print out of PMR Process: VSR Checklist

Practical Exercise

|  |  |
| --- | --- |
|  | |
| **Time Required** | 0.25 hours |
| **EXERCISE** | Review the questions below and select the correct answer.  Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
|  |  |

1. Which PMR medical release requests are not received automically through Centralized Mail to the PMR contractor?
2. How can you tell if a *VA Form 21-4142, AUTHORIZATION TO DISCLOSE INFORMATION TO THE DEPARTMENT OF VETERANS AFFAIRS (VA)*came from Vonapp Direct Connect?
3. Does the VA accept non standard medical release requests for VA claims?
4. Do non standard medical release requests go automatically from Centralized Mail to the PMR contractor for processing?
5. In the instances in which a PMR medical release request is received and has not gone through the Centralized Mail to the PMR contractor, what is the name of the checklist that should be used to determine next steps?
6. Whom may sign a *VA Form 21-4142,* *AUTHORIZATION TO DISCLOSE INFORMATION TO THE DEPARTMENT OF VETERANS AFFAIRS (VA)*?
7. If VA Form 21-4142 requires a VA Form 21-412A submission and they are two separate documents, what naming convention, per the PMR Process: VSR Checklist should be used?