PMR Process: VSR Checklist

Instructor Lesson Plan

Time Required: 1.5 Hours

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 4201870 |
| Prerequisites | Prior to this lesson, the post-Challenge Veteran Service Representatives (VSRs) should have 6 months of VSR experience. |
| target audience | The target audience for PMR Process: VSR Checklist is post-Challenge Veteran Service Representatives.  Although this lesson is targeted to teach the post-Challenge Veteran Service Representative employee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.5 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * PMR Process: VSR Checklist PowerPoint Presentation * PMR Process: VSR Checklist Trainee Handout * PMR Process: VSR Checklist Answer Key |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| Introduction to PMR Process: VSR Checklist | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | 0.5 hours |
| Purpose of Lesson | | This lesson is intended to introduce the VSR to the PMR Process: VSR Checklist to ensure that medical release requests are correctly sent to the PMR contractor, DOMA, for processing. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * How to identify which private medical release (PMR) requests in VBMS did not go through Centralized Mail to DOMA for processing. * How to apply the steps in PMR Process: VSR Checklist. |
| Lesson Objectives  Discuss the following:  Slide 2  Handout 2 | In order to accomplish the purpose of this lesson, the VSR will be required to accomplish the following lesson objectives.  TheVSR will be able to:   * Identify which private medical release (PMR) requests in VBMS did not go through Centralized Mail to DOMA for processing. * Apply the steps in PMR Process: VSR Checklist. | |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed. | |
| Motivation | Understanding when and how to perform the steps on the PMR Process: VSR Checklist will ensure that no private medical evidence requests will be overlooked in processing the Veteran’s claim. | |
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| References  Slide 3  Handout 2 | Explain where these references are located in the workplace.  All M21-1 references are found in the [Live Manual Website](https://vaww.compensation.pension.km.va.gov/).   * [**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) | |

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| Topic 1: Identify PMR Requests which need to go to DOMA | |
| Introduction | This topic will allow the trainee to identify those private medical release requests in VBMS which did not go through Centralized Mail to DOMA for processing. |
| Time Required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify Vonapp Direct Connect (VDC) 4142s * Identify non standard medical release requests |
| **Medical releases not sent to DOMA**  Slide 4  Handout 3 | 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 DOMA. |
| VDC 4142s  Slide 5  Handout 3 | 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. In the example displayed, the top left corner shows “submitted electronically”, with no other indication that the document went automatically for PMR processing.  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.  In the example displayed, the 4142 came from VDC. The next step is to determine if this form meets the criteria for development. You should never download and submit a medical release request which does not need development to the PMR contractor. |
| Non standard medical release requests  Slide 7  Handout 3 | * 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 DOMA. * These releases will need to be identified in VBMS, and the steps on the PMR Process VSR Checklist need to be followed. |
| Non standard medical release request example  Slide 8  Handout 3 | The example of the non standard medical release request is displayed. Kaiser Permanente is an example of a private medical provider that sometimes but not always requires their own medical release request form. This can vary from one region of the country to another, with this provider.  Kaiser Permanente is only one example of one provider that may require their own release. When you see this form in VBMS and it is complete and in need of development, it needs to be submitted to the PMR contractor for processing. These non standard forms do not automatically get sent for PMR processing by Centralized Mail. |
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| Topic 2: PMR Process: VSR Checklist | |
| Introduction | This topic will allow the trainee to understand the steps in PMR Process: VSR Checklist. |
| Time Required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify where to locate the PMR Process: VSR Checklist * Perform the steps in the PMR Process: VSR Checklist |
| PMR Process: VSR Checklist  Slide 9  Handout 4 | 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 DOMA through Centralized Mail, the steps on the VSR Checklist should be followed. |
| PMR Process: VSR Checklist Steps 1 - 3  Slide 10  Handout 4  *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.* | 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 as well as the medical release request.   1. Update Share BIRLS Inquiry with date of birth, SSN, and other identifying information. |
| **PMR Process: VSR Checklist Steps 4 – 6**  Slide 11  Handout 5  Instructor should indicate that 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 on the PMR Process: VSR Checklist.  Instructor should note that following the naming conventions outlined in the checklist are critical. The PMR contractor uses the naming convention to help identify the claimant in Share.  The instructor should note that the step to upload to PMR Vault is only done by the PMR Super User at the Regional Office or by those designated by local management to perform the upload. Unless you are identified as an individual assigned to this task, you will not need to perform the upload to PMR Vault. | 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). 2. 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   1. Save VA Form 21-4142, VA Form 21-4142A or other medical release requests to a secure folder. |
| Any Questions?  Slide 12 |  |

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| 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. |
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# Which PMR medical release requests are not received automically through Centralized Mail to the PMR contractor?

# 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?

# Does the VA accept non standard medical release requests for VA claims?

# Do non standard medical release requests go automatically from Centralized Mail to the PMR contractor for processing?

# 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?

1. Whom may sign a *VA Form 21-4142,* *AUTHORIZATION TO DISCLOSE INFORMATION TO THE DEPARTMENT OF VETERANS AFFAIRS (VA)*?
2. 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?

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| Lesson Review, Assessment, and Wrap-up | |
| Introduction  Discuss the following: | The PMR Process: VSR Checklist lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.25 hours |
| Lesson Objectives | You have completed the PMR Process: VSR Checklist lesson.  The trainee should be able to:   * Identify which private medical release (PMR) requests in VBMS did not go through Centralized Mail to DOMA for processing. * Apply the steps in PMR Process: VSR Checklist. |
| Assessment | Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course.  The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. |