Review of COVERS, Claims Folder Creation and File Requests

Instructor Lesson Plan

Time Required: 1.75 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 # | 4411842 |
| Prerequisites | This is an introductory class. |
| target audience | The target audience for Review of COVERS, Claims Folder Creation and File Requestsis Claims Assistant, Entry Level VSR and Entry Level RVSR.Although this lesson is targeted to teach the Claims Assistant, Entry Level VSR, and Entry Level RVSR employee it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.75 hours |
| Materials/TRAINING AIDS | Lesson materials:* Review of COVERS, Claims Folder Creation and File Requests PowerPoint Presentation
* Review of COVERS, Claims Folder Creation and File Requests Trainee Handouts
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| Training Area/Tools *\*Do not spend too much time trying to locate a paper claims folder. If you cannot find one, skip the demonstration for Topics 2&3.* | The following are required to ensure the trainees are able to meet the lesson objectives: * \*Paper Claims Folder *(optional)*
* 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
* VA computer systems with access COVERS
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| 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.
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| 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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| Review of COVERS, Claims Folder Creation, and File Requests  |
| INSTRUCTOR INTRODUCTION | Complete the following:* Introduce yourself
* Orient learners to the facilities
* Ensure that all learners have the required handouts
 |
| time required | 0.17 hours |
| Purpose of LessonExplain the following: | This lesson is intended to provide a basic overview of COVERS functionality and claims folder requests. This lesson will contain discussions and exercises that will allow you to gain a better understanding of: * How to Establish a Claims Folder
* Paper vs Electronic Files
* COVERs Folder Inquiries and Requests
* Introduction to COVERs Reports
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| Lesson ObjectivesSlide 2Handout 2 | In order to accomplish the purpose of this lesson the Claims Assistant, Entry Level VSR, and Entry Level RVSR will be required to accomplish the following lesson objectives.TheClaims Assistant, Entry Level VSR and Entry Level RVSRwill be able to: * Establish a new electonic claims folder
* Determine when to convert paper files to electronic folders
* Demonstrate proper procedure to request folders through COVERS
* Discuss basic overview of the report functionality in COVERS
 |
| 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 | Proper use of COVERS reduces the chances of losing a claims folder and reduces the time necessary to associate mail with the claims folder.  |
| STAR Error code(s) | STAR does not call errors for system compliance; however, System Compliance errors will be called by local QRT for failure to properly update COVERS when receiving or transferring paper claims folders. |

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| ReferencesSlide 3Handout 3 | Explain where these references are located in the workplace.* [M21-1, Part III, Subpart ii, 3.B, Paper and Electronic Claims Folders](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014123/M21-1-Part-III-Subpart-ii-Chapter-3-Section-B-Paper-and-Electronic-Claims-Folders)
* [M21-1, Part III, Subpart ii, 4.A, Paper Claims Folders Storage and Control](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014126/M21-1-Part-III-Subpart-ii-Chapter-4-Section-A-Paper-Claims-Folders-Storage-and-Control)
* [M21-1, Part III, Subpart ii, 5.E](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014140/M21-1-Part-III-Subpart-ii-Chapter-5-Section-E-Permanent-Transfer-Out-or-Transfer-In-of-Paper-Claims-Folders), General Policies for Permanent Transfer-In of Paper Claims Folders
* [COVERS online users guide](http://css.vba.va.gov/COVERS/)
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| Topic 1: How to Establish a Claims Folder |
| Introduction | This topic will provide the trainee with procedural guidance for establishing a claims folder. We will also discuss when and how to manual establishment of a claims folder is needed.  |
| Time Required | 0.5 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Determine when to manually establish a claims folders and what actions automatically create a claims folder.

The following topic teaching point support the topic objectives: * Proper update of claims folders assists in the processing of claims by avoiding confusion for anyone searching for the file at a later time. It can also assist through an automated records request to RMC.
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| **Actions in Share That Establish a Claims Folder in VA Systems***Slide 4**Handout 4***Manually Establishing a Claims Folder in VA Systems**Slide 5Handout 4-6 |

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|  | A claims folder is established in VA systems automatically via PRODADM when a(n)* original claim is established using the CLAIMS ESTABLISHMENT C+P command in Share
* the BIRLS ADD command is executed, or
* the FIRST NOTICE OF DEATH command is executed.
 |

Follow the steps below to manually establish a claims folder in VA systems when* a BIRLS record exists
* no claims folder exists, and
* processing of mail does not require executing the CLAIMS ESTABLISHMENT C+P command in SHARE.
	1. Execute a SINGLE INQUIRY command in COVERS using the anticipated claims folder number.Manually establish a claims folder, if the results in the MESSAGE FIELD of the SINGLE INQUIRY screen indicate
* a folder was not found, and
* a BIRLS claims folder number exists.
	1. In Share select the BIRLS UPDATE command and enter the following information then select SUBMIT:
* claims folder number or Social Security number (SSN)
* payee code 00 for Veteran
* Veteran’s first name, and
* Veteran’s last name.
	1. Update any additional information received on the VETERANS IDENTIFICATION DATA (VID) screen.
	2. The CLAIM FOLDER LOCATION field on the VID screen will indicate that no folder exists (NFE). Select the FOLDER LOCATION tab.
	3. In the FOLDER CONTROL FIELDS of the FOLDER LOCATION tab, select the radial button next to ESTABLISH and a drop down box will appear.
		+ Select CLAIM in the drop down box, and
		+ Select UPDATE.
	4. In Share select the COPORATE FLASHES command. In the AVAILABLE RO FLASHES field
* select the *No Paper Claim Folder* flash
* use the arrows to move the flash into the SELECTED RO FLASHES field, and
* select submit.
	1. In COVERS, select the RECEIVE command.
* On the ENTER FOLDER IDENTIFICATION screen, select the CHG LOC function, and
* select the stations’ VBMS scanning location from the drop down menu.
	1. On the ENTER FOLDER IDENTIFICATION screen, enter the claims folder number in the FILE NUMBER field and select OK. A series of pop ups appear, answer them as follows
* *No*
* *OK*, and
* *Yes*.
* Then select OK at the bottom of the ENTER FOLDER IDENTIFICATION screen to update the location.
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| Exercise | Complete action for both types of claims folder establishment. Explain more in depth what a PRODADM folder is and how PRODADM folders created at ROs and located at RMC differ. |
| DEMONSTRATION |  |
| Topic 2: Paper vs Electronic Files |
| Introduction | This topic will provide the trainee a brief overview of why we still need COVERS to track files. We will also discuss when and how to request conversion of paper claims to eFolders.  |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* Determine when to convert paper files to electronic folders

The following topic teaching point support the topic objectives: * Although VA is going paperless, we have not achieved a 100% paperless claims processing environment yet.
 |
| Types of Claims FoldersSlide 6Handout 8 | Although the majority of claims folders are currently stored in electronic systems, including VBMS and LCM, there are still many claims folders in paper format. Most paper claims folders will be converted into electronic format; however there are a few exceptions. The following claims files will be established and/or retained in paper format:* all sensitive level 8 claims including
	+ witness protection, and
	+ classified claims, and
* Integrated Disability Evaluation System (IDES) claims requiring Military Services Coordinators (MSC) to build a physical claims folder for original disability compensation claims. Original IDES claims require creation of a paper claims folder only when service treatment records (STRs) provided to the MSC are
	+ hard copies, or
	+ a combination of hard copies and electronic.
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| When to Scan Paper Files into Electronic Format*Slide 7**Handout 8* | Using the table on page 8 of the handout, explain when a paper file should be sent for scanning into electronic format. |

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| Topic 3: COVERS Folder Inquiries and Requests |
| Introduction | This topic will tell the trainee when to request paper files from the file bank and demonstrate how to do this in COVERS. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching PointsSlide 8Handout 9 | Topic objectives:* Demonstrate proper procedure to request folders through COVERS
* Understand commonly used COVERS locations

The following topic teaching points support the topic objectives: * COVERS (Control of Veterans Records System) is a Microsoft Windows-based Client/Server application using barcode technology to support RO (Regional Office) and RMC (Record Management Center) folder activities, including requests, mail, search, and external transfers. **Proper use of COVERS is essential to avoid losing claims files and/or delaying claims processing.**
 |
| Folder Inquiries*Slide 11*Handout 9 | To conduct an inquiry to determine the current location of a claims folder use the “Single Inquiry” button, enter the file number and folder type and press “OK.” If a folder type is not selected – the single inquiry function defaults to “claims” folder type.Claims processors use the COVERS locations listed in the table below when a paper claims folder is sent for scanning conversion or when establishing a claims folder where no paper claims folder previously existed.

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| **COVERS Location** | **Description** |
| DCSC1 | Converted and stored at CACI Newnan, GA |
| DCSC2 | Converted and stored at CACI Mt Vernon, KY |
| DCSS1 | Converted and stored at SMS Janesville, WI |
| DCSS2 | Converted by Records Management Center (RMC) and stored at SMS Janesville, WI |
| PALL01- PALL22 | Converted and stored at RMC |
| VBMSRT | Location for claim folders that exist only in VBMS |
| INVBMS | Location for claim folders that exist only in VBMS |
| EFILE | Location for claim folders that exist only in VBMS |
| INVVA | Location for claim folders that exists in LCM |
| NEWXFF | Location for claim folders that exists in LCM |
| ICMHS | Converted as part of the File Bank Extraction program. |

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| Folder Requests*Slide 12-14*Handout 8 | If an inquiry reveals that a paper file exists for a claims folder you can request the folder by utilizing the “Perm Request” function from the COVERS “single Inquiry “ screen. Each RO will have its own procedures for responding to folder and mail searches. Due to recent File Bank Extraction the file banks of all regional office have been sent to the vendor for eventual upload. If a claim is received for a veteran who has a claims folder pending upload from file bank extraction a ticket must be submitted for expedite using the [OBPI-VCIP Issue Tracker](https://vaww.infoshare.va.gov/sites/OBPI/VCIP/SD/OBPI%20Issue%20Tracker/default.aspx).Do not use the “Request” function from the main menu to request a folder in COVERS. Mail and Folders search requests are no longer used in COVERS. Instead use one of the processes mentioned above.***Note: Do not “Receive” a claims folder until it is in your possession.*** ***Important: Never use the “Request” or “Receive” functions in COVERS for eFolders; receiving an eFolder in COVERS will update the system to indicate the file is in your possession and can cause confusion for anyone searching for the file at a later time.***  |
| Exercise | Have the class follow along as you go through the following examples. |
| DEMONSTRATION | Show the class examples of the following:* A recently created PRODADM paperless file
* A folder needing request from another station (376 or other)
* A claims folder with location DCSS1
* A claims folder with loction ICMHS
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| Topic 4: Introduction to COVERS Reports |
| Introduction | This topic will allow the trainee to gain a basic understanding of what reports are available in COVERS and how to run the reports. |
| Time Required | 0.25 hours |
| OBJECTIVES/Teaching Points | Topic objectives:* COVERS provides reports to help authorized users track various aspects of system usage. Reports are available from the Utilities menu.
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| Available ReportsSlide 15Handout 10 | The following COVERS reports are available from the Reports selection screen:Search List by Search LocationSearch List by Priority CodeSearch List by Folder LocationSearch List by Terminal DigitFolder Statistics ReportTemporary Transfers ReportPermanent Transfer ReportFolder Aging for a Location ReportSpecial Codes Statistics ReportMulti-Volume Folders - Terminal Digit SequenceMulti-Volume Folders - Folder Number SequenceUnauthorized SO Holdings ReportFolder Search Review[Validation Tables Report](http://css.vba.va.gov/COVERS/Validation_Tables_Report.htm#Validation_Tables_Report) |
| Generating ReportsSlide 16Handout 10 | To generate a COVERS Report 1. Select the Reports button or the Utilities button from the COVERS Main Menu.
2. If utilizing the Utilities Menu, select the Reports button. The *Reports Selection* menu will appear.
3. Request a report by clicking on the name of the report and selecting the OK button, or by double-clicking on the name of the report.

***Note: For some reports, COVERS immediately issue the report request. For others, the user will be asked to enter more information before the request for the report is issued. The Folder Search Review report is a screen display rather than a printed report; it displays as soon as the data is available.***For all printed reports, except the Validation Tables Reports, once the report is requested, a message will be received stating the report has been requested and will be emailed after 6:00PM Central Time, or that no searched satisfied the screen criteria.The Validation Tables Report will print as soon as it is requested. |
| Exercise | N/A |
| note(s) | Most COVERS reports will be run by coaches; this section is for information purposes only.  |
| DEMONSTRATION | Show where to find these reports in COVERS. |

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| Practical Exercise |
| Time Required | 0.17 hours |
| EXERCISE | Provide 5-10 minutes to allow the students time to answer the practical exercise questions.Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |

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| Lesson Review, Assessment, and Wrap-up |
| Introduction | The COVERS Mail, Folder and Report Control lesson is complete. Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.16 hours |
| Lesson Objectives | You have completed the COVERS Mail, Folder and Report Control lesson. The trainee should be able to: * Determine when to convert paper files to electronic folders
* Demonstrate proper procedure to request folders through COVERS
* Discuss how to use the report functionality in COVERS
 |
| 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. |