PIES Demo

Instructor Lesson Plan

Time Required: 2 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 # | 610914 |
| Prerequisites | None |
| target audience | The target audience for PIES Demo is VSR, Intermediate or Journey Level.  Although this lesson is targeted to teach VSR, Intermediate or Journey Level employee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 2 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * PIES Demo PowerPoint Presentation * PIES Demo Trainee Handout * PIES Demo Participant Guide |
| 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 PIES Demo | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | 0.25 hours |
| Purpose of Lesson  Explain the following: | | The purpose of this lesson is to introduce the trainees to the Personnel Information Exchange System (PIES) and to allow them to practice their skills on actual cases. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * General Information about PIES * PIES Request Codes * PIES Status Codes |
| 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.  TheVSRwill be able to:   * Understand the functionality of the PIES application * Identify the correct way to request the 3 types of service records from records facilities * Recognize the purpose for the various PIES address and status codes | |
| *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 | PIES is a VA application through which authorized users may request service records and information from the National Personnel Records Center (NPRC) and individual branches of service, replacing the antiquated paper based requests. | |
| STAR Error code(s) | Element 2, Element 3 | |
| References  Slide 3  Handout 3 | 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, 2.D](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014158/M21-1-Part-III-Subpart-iii-Chapter-2-Section-D-Requesting-Information-and-Records-Through-the-Personnel-Information-Exchange-System-PIES), Requesting Information and Records Through the Personnel Information Exchange System (PIES) * [M21-1, Part III, Subpart iii, 2.E](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014159/M21-1-Part-III-Subpart-iii-Chapter-2-Section-E-Unique-Claims-and-Situations-That-Require-Special-Handling), Unique Claims and Situations That Require Special Handling * [PIES User Guide](https://vbaw.vba.va.gov/bl/21/Products/piesdpris.htm) | |

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| Topic 1: General Information about PIES | |
| Introduction | This topic will allow the trainee to identify the types of records that may be obtained using PIES and where the records are stored. The trainee will also be able to determine applicable dates for records that may be obtained through PIES. |
| Time Required | 0.5 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify the function of the PIES application   The following topic teaching points support the topic objectives:   * PIES Information * PIES Help * Types of Records * Where Records are Stored – NPRC and RMC * Using PIES |
| PIES Information  Slide 4  Handout 4 | *Inform the trainees that VA uses 2 primary applications for requesting service information and records, DPRIS and PIES.*  *Explain the different programs within PIES:*   * PIES Create – developed for RO and RMS users to create and submit requests * PIES Respond – developed for use by the VA Liaison Office (VALO), which is * staffed by RMC employees, * collocated with NPRC, and * responsible for responding to request submitted through PIES Create |
| PIES Help  Slide 5  *Handout 4* | *Inform the trainees that* PIES Help screens are rich with details and can answer many questions regarding military and related records, as well as how to use PIES. This can be accessed once logged into PIES, by clicking on the yellow question mark icon at the top.  *Also explain that* the PIES User Guide and DPRIS Web to PIES Cross Reference Guide are available on the Compensation Service Intranet site under Procedures (212), [PIES/DPRIS](https://vbaw.vba.va.gov/bl/21/Products/piesdpris.htm). |

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| Types of Records  Slide 6-8  Handout 4-6 | *Discuss the different types of records that can be requested through PIES:*   * Service Records * Health Records * Financial Records   *Elaborate on the different types of records that fall under each category. Specifically, Health Records have several subcategories: Medical Treatment Records, Dental Records, Clinical Records, and Other.* |
| Where Records are Stored – NPRC  Slide 9  Handout 6-7 | *Discuss the following:*  National Personnel Records Center (NPRC) houses most service records in St. Louis, MO.  NPRC is not a VA facility nor is it a military facility. NPRC is under the auspices of the National Archives and Records Administration (NARA). NPRC has the custodial responsibility for maintaining military records for the Department of Defense (DoD).  *Also explain the different types of records housed by NPRC – STRs, service personnel records, and clinical records.* |
| Where Records are Stored – NPRC (cont.)  Slide 10  *Handout 7* | *While showing the tables on slide 10, talk about the discharge dates prior to which both STRs and Personnel Records are housed at NPRC, warranting a PIES request.* |
| Where Records are Stored – RMC  Slide 11  *Handout 7* | *Explain that* the following station locations found in BIRLS all refer to the same thing – 375, 376, St. Louis RMC, RPC, and SMRC.  Inform the trainees that the RMC houses:   * *Inactive* VA claims folders (which may contain copies of clinical records) * All original STRs belonging to former service members whose service ended between the dates shown in the above Service Treatment Records table, and December 31, 2013   ***Prior to January 1, 2014 the Army, Navy, Air Force and Marine Corps medical records were forwarded to RMC on or after the above schedules. The Coast Guard records continued until September 1, 2014. After these dates, they were scanned and uploaded into DoD’s Healthcare Artifacts and Images Management Solution (HAIMS)*** *(*[*M21-1, Part III, Subpart iii, 2.A.4.c*](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014154/M21-1-Part-III-Subpart-iii-Chapter-2-Section-A-General-Information-on-Service-Records#3)*)* |
| Using PIES – BIRLS Information  Slide 12  Handout 8 | *Stress the importance of first verifying that all information on the BIRLS VID screen is correct. This is important as PIES logic relies on this data to function properly.*  *The Veteran’s service number must be included, if applicable.*  *Inform trainees that if the information is correct, they must update the information* **prior** *to creating the PIES request.* |
| Using PIES – Create Request  Slide 13-15  *Handout 8* | *Show the screen shots on the PowerPoint slides and discuss the steps that are needed on each screen of the request.*  *As you’re going through the steps, when it comes to the actual request to choose, discuss the following:*  If a PIES request is required for STRs and service personnel records, then use the **PIES O50** request code. The single O50 request will notify NPRC to acquire all of the claimant’s available STRs and OMPF records and scan and upload these records into the Veterans Benefits Management System (VBMS) electronic folder (eFolder). |
| Using PIES – Print Request  Slide 16-17  *Handout 9* | *Inform the trainees that it is important that they upload a copy of the 3101 print into VBMS after submission. They shouldn’t just upload a copy of the screen print showing a successful submission.*  *Walk the trainees through the different steps as shown on the PowerPoint slides.* |

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| Topic 2: PIES Request Codes | |
| Introduction | This topic will allow the trainee to identify and utilize individual PIES request codes. |
| Time Required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify the correct way to request the 3 types of service records from records facilities * Recognize the purpose for the various PIES address and status codes   The following topic teaching points support the topic objectives:   * PIES Request Codes – General * PIES Request Codes – Fire Related * PIES Request Codes – NG/Reserves |
| PIES Request Codes – General  Slide 18  Handout 10 | *Explain that most common requests have pre-formatted request codes and that these should be utilized whenever possible. They ensure that the request is routed to the correct address and that the proper record will be retrieved to respond to the request.*  ***Note***: When no request code exists for the specific information or record required, use request code *O99*, which allows submission of a request in free-text form.  *Discuss the PIES O50 request. This will be used a majority of the time, as it is a request for all STRs and Personnel records available for the Veteran in question.*  *Explain the following:*  Users rarely need to enter an address code when submitting a PIES request, since PIES programming logic performs that function automatically.  ***Exception***: Users must manually enter an address code for requests they submit through PIES to   * address code 51 (for certain Coast Guard records), and * service department retired pay centers.   ***Note:*** Code 13 does not use all codes listed. They use only C01, C02, C03, C04, M05, S02, O20, O50 and O99 |

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| PIES Request Codes – Fire Related (M05/M05-V)  Slide 19  Handout 11 | *Trainees should utilize this request when requesting records to supplement the medical records of Army and Air Force Veterans that were destroyed in a fire at the NPRC in 1973.*  *They should only submit when an initial PIES O50 request was made and NPRC response requests a copy of NA 13055/13075, DD214, or identifies the claim as fire-related.*  *Remind trainees that, at the time they submit the initial PIES O50 request, a corresponding NA Form 13055/13075 should simultaneously be sent to veteran requesting they provide applicable evidence and return the form within 30 days.*  *M05 – used for requests when the file is a paper folder*  *M05-V – used for requests when the file is an eFolder*  *If no If no medical/dental records or SGOs exist, trainees should search sick/morning reports.*  **Note: Morning reports for Army – there is very little after 1974**  **Reference**: For information about handling claims that require requests for records destroyed in the fire at NPRC, see [M21-1, Part III, Subpart iii, 2.E.1](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/#!agent/portal/554400000001034/article/554400000014159/M21-1, Part III, Subpart iii, Chapter 2, Section E - Unique Claims and Situations That Require Special Handling). |
| PIES Request Codes – NG/Reserves  Slide 20  Handout 13 | *Explain that NG and Reserve records for the following Veteran may be requested through PIES:*   * a Veteran **actively** serving in the NG or Reserves, or * records not otherwise located for a Veteran recently separated/retired from a NG or Reserve unit (within the last 12 months). |

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| Topic 3: PIES Status Codes | |
| Introduction | This topic will allow the trainee to identify and utilize individual PIES status codes. |
| Time Required | 0.5 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Recognize the purpose for the various PIES address and status codes.   The following topic teaching points support the topic objectives:   * PIES Status Codes * Checking the Status in PIES |
| PIES Status Codes  Slide 21  Handout 14 | *Discuss the different PIES status codes, and what they mean.*  *Stress that trainees should only submit a follow-up PIES request to the* [*VAVBASTL/RMC/VBMS*](mailto:VBMS.VBARMC@va.gov) *mailbox if the request status shows* Open *and the response* has been pending at least *45 days.* |
| Checking the Status in PIES  Slide 22-23  Handout 14-15 | *Using the screen shots shown in the PowerPoint, discuss the steps for checking PIES request status.* |
| Regional Office Specific Topics | At this time add any information pertaining to:   * Station quality issues with this lesson * Additional State specific programs/guidance on this lesson |
| DEMONSTRATION | At this time, demonstrate a live PIES request. Show the trainees how to:   * submit and print a PIES request * upload the 3101 print into VBMS * check the status of a PIES request |

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| Practical Exercise | |
| Time Required | 0.25 hours |
| EXERCISE | Have the trainees turn to p.16 in the trainee handout. Allow 10 minutes to complete the questions. Take 5 minutes to review the answers.  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  Discuss the following: | The PIES Demo 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 PIES Demo lesson.  The trainee should be able to:   * Identify the function of the PIES application * Identify the correct way to request the 3 types of service records from record facilities. * Recognize the purpose for the various PIES address and status codes. |
| 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. |