**CAPRI Vocational Rehabilitation and Employment Medical Services
Request Functionality – December 5, 2014**

SLIDE 1-INTRODUCTION

Welcome. This training will introduce you to a new CAPRI feature that will allow Vocational Rehabilitation and Employment (VR&E) to submit an electronic Request for Medical services to Veterans Health Administration (VHA). Ruth Comeau, Senior Program Manager, VR&E Service – VA Central Office, will present today's training.

CAPRI is the Compensation and Pension Record Interchange system. It is a program that has been in use for many years as an interface between Veterans Benefits Administration (VBA) and VHA for purposes of access to Veterans' medical records and compensation and pension rating decisions.

VHA Chief Business Office (CBO), in collaboration with VBA VR&E Service, sponsored software enhancements to the CAPRI system. The software changes will enable VR&E staff to electronically transmit requests for medical services through CAPRI. Each VHA facility has designated a single point of contact (POC) to receive and process referrals for Veterans participating in the VR&E program.

Nine VBA Regional Offices (ROs) and their affiliated VHA facilities participated in a pilot program to test these new procedures. The pilot dates were September 30, 2013 through June 30, 2014. System access, operational elements, and procedural guidance were tested through the submission of over 550 requests for medical services during the pilot period.

The result of the pilot is a simplified, electronic submission process to request medical services for participants in the VR&E program. This new process will be the primary referral method to VHA for medical services for VR&E participants. If this new method is not utilized by the VR&E Office, then use of VA Form 28-8861, Request for Medical Services is still required.

It is important to note that use of electronic requests through CAPRI for medical services is not required, but rather an option to expedite the delivery of services to VR&E participants. It also enhances the ability to track the status of medical referrals using reporting tools in CAPRI. VR&E staff must work closely with their local VHA POCs to ensure a smooth transition to the new medical request process.

A Vocational Rehabilitation Counselor (VRC), or other designated VR&E employee, will use CAPRI to submit the medical request electronically. A VHA Coordinator will manage the electronic routing of the referral to the appropriate medical department for scheduling the appointment and notifying the Veteran. Appointments scheduled based on a request submitted by VR&E will be displayed – with no special label or marking – on the "Admin" tab in the Veteran's CAPRI record. Medical records reflecting the service provided will be available for view on the "Clinical Documents" tab in the Veteran's CAPRI record. Report functionality will allow stations to track the status and outcome of the referral.

In this training, we will guide you through the 3 VR&E functional areas – Referral, Clinical Documents, and Reports.

SLIDE 2-OBJECTIVES
After this session, you will be able to perform the following objectives with 100% accuracy:

-Identify documentation requirements
-Identify three major features of the new CAPRI functionality for the VR&E Request for Medical Services.

Now let's begin.

SLIDE 3-GAINING ACCESS TO CAPRI
First, let's help you gain access to CAPRI if you don't already have access. VR&E Officers (VREOs), Assistant VR&E Officers (AVREOs), Supervisory Vocational Rehabilitation Counselors (SVRCs), Vocational Rehabilitation Counselors (VRCs), and Employment Coordinators (ECs), who provide entitlement determinations and/or case management services are allowed access to CAPRI Chapter 31 functionality and reports. Users with existing CAPRI access will need to submit an updated request to gain access to CAPRI Chapter 31 referral functionality and reports. Complete VAF 20-8824-CAPRI, User Request for CAPRI Access, and submit to the local Information Security Officer (ISO).

Special instructions when completing this form are as follows: Complete all user information in Section I. On Item 10, click "Add" for new CAPRI users or "Modify" for existing CAPRI users, and continue to Section II.

In Section II, request access to the following VR&E security keys and reports:
DVBA CAPRI VRE Counselor
DVBA CAPRI DENY GetVBADOCS
VR&E Reports

This information is also provided in the text document that accompanies this training, and VAF 20-8824-CAPRI is attached to Circular 28-15-02, with Section II auto-populated. It can also be accessed online at the website provided in the text associated with this training as well as the VR&E Knowledge Management Portal (KMP), on the Forms and Letters page. The on-line forms can be electronically populated. Additional information and instructions for adding CAPRI security keys for VR&E users is available on the Compensation Service Intranet site and the web link is also provided in the text associated with this training.

- http://vbaw.vba.va.gov/bl/21/DEMO/capri.htm
    - "VA Form 20-8824-CAPRI, User Request for CAPRI Access."
    - Instructions on adding CAPRI security keys for VR&E users.

SLIDE 4-CAPRI LOG-ON SCREEN
Now that we have completed our review of how to gain access to CAPRI and the VR&E security keys and reports, let's begin the How-To Portion of this training in the use of CAPRI to make an electronic Request for Medical Services.

This section will demonstrate:
- the login steps;
- the "Voc Rehab" tab where the referral action occurs and where the status of the referral is displayed;
- the e-mail communication functionality;
- how to locate the clinical documents; and
- the Reports functionality.

Please NOTE: For purposes of this training, all the screens you will see are from test cases. No actual Veteran Personally Identifiable Information has been used or displayed.

First, access CAPRI REMOTE application from VBApps Menu.

SLIDE 5-SELECT REGIONAL OFFICE

Next, select your regional office. If you have access through only one Regional Office (which is the case for most users), you will not see this screen. However, if you have access through multiple Regional Offices (which applies to some users), you must highlight a selection and click OK.

At this point, your user ID is captured – your name, your phone number, and your VHA MailMan e-mail address– which serves as the system default "Point of Contact" information on the referral are all captured. If you do not use VHA MailMan service as your primary e-mail system, you can change the default setting to your Outlook e-mail address using CAPRI Tools, which you select from the main CAPRI Menu bar.

SLIDE 6-SELECT PATIENT

Next is the Patient Selector screen. The recommended entry in the Patient ID block is social security number with no dashes – NOTE: VHA does not use VBA-issued 8-digit claim numbers to identify patients.

You may also enter Veteran's last name, comma, and first name, with no spaces.

Or you can enter the first initial of the last name, and all the patients in the system with that last name at the VA Medical Center will appear, as this screen shot demonstrates.

Note that if this screen does not appear automatically, or if you wish to select another record, you may go to File on the menu bar, and then Select Patient.

SLIDE 7-MAIN PAGE

This is the CAPRI main page. Note the "VocRehab" tab to the far right.

VR&E functionality is enabled when you click the "VocRehab" tab.

SLIDE 8-VOC REHAB TAB

This is the "Voc Rehab" tab Medical Services Requests screen. Until a referral is submitted, this page will display the message "No records found". The "Add New Request" button is enabled based on user permissions in CAPRI.

The screen contains three columns: Date Requested, Date Completed, and Date Cancelled, and provides a snapshot of the status of current and historical VR&E referrals.

To initiate a referral for medical services, hit the "Add New Request" button.

SLIDE 9-ADD NEW REQUEST

This is the "Add New Request" screen, which displays the name of the Veteran that was entered in the "Select Patient" step, and the current date. As a reminder, the Ch31 medical request functionality occurs within a Veteran's VHA record – there is no need to enter any other Veteran identifying information.

CAPRI displays the Regional Office you are associated with based on your log-on identification, and will automatically pull in your contact information and display it in the "Point of Contact" button. It retrieves this info each time you log-in to CAPRI.

SLIDE 10-POINT OF CONTACT

The "Point of Contact" button lists the user's name, phone number and email address. CAPRI derives this information from your log-on as we mentioned previously on Slide 5.

This is an important feature for system interaction between VHA and VR&E. It will be used to send email alerts based on updates on the status of the referral, and based on elapsed time between submission by VR&E and downloading by VHA. CAPRI will alert the individual who input the electronic request for medical services via email when the request has been processed. This email will default to the email listed in CAPRI.

VR&E CAPRI users must complete the following steps to ensure their correct default email address setting is listed: Select "Tools" on the CAPRI main toolbar menu, highlight "Change Forwarding Address", Select "other" radial button and type your Outlook address in the field. Click OK to update the "Point of Contact" default e-mail address in CAPRI.

SLIDE 11-DOCUMENTATION REQUIREMENTS

The VR&E case manager is required to document, in a Corporate WINRS note, when an electronic referral is completed in CAPRI. The case manager must also follow all the procedural requirements for the printing of CAPRI records as outlined in M28R.II.A.2. The case manager may be able to track the progress of the referral through CAPRI email alert functionality, appointment schedule, clinical documents and/or reports, and update Corporate WINRS notes as appropriate.

SLIDE 12-ANTICIPATED DATE OF REHAB
There are 4 required fields and 4 optional fields on the "Add New Request" screen.

The first required field is the "Anticipated Date of Rehabilitation." It allows entry of a future date, which should match the anticipated completion date on the Veteran's Rehabilitation Plan. VHA relies on accuracy in this field to comply with the provisions of Title 38 U.S.C., 3104(a)(9). Please make sure to refer to the Rehabilitation Plan when completing this section.

SLIDE 13-MEDICAL SERVICES REQUESTED
The second required field is the "Medical Services Requested" field.

A drop-down list of medical services is provided. The core list matches the list that was used in Veterans Tracking Application (VTA), and 3 additional services were added to meet Ch31 needs. The additional services are: 1) Primary Care Physician – HISA Grant/Prescription for HISA Modifications; 2) Primary Care Physician – General Care/Coordination of Services; and 3) Mental Health (*). These are used for special programs.

If none of the options on the drop-down list fit the Veteran's needs, select "Other".   When "Other" is selected, the "Other Description" field will be enabled and the user must describe the medical service sought.

Please note that only one service per referral is allowed. If a Veteran needs multiple referrals, then the VR&E case manager will complete the screen for each service required.

SLIDE 14-MSR-OTHER

Continuing on, "Reason for Referral" is the third required field. This field allows up to 200 characters. If needed, use the "Comments/Notes" field to continue the description. This field allows the VR&E case manager to more fully communicate the services and/or information/consult sought from VHA. Case managers should not specify the means by which VHA will assess the Veteran for the needed services and/or information. In some cases, VHA treatment providers will be able to provide the requested service and/or information based on existing medical treatment records. In other cases, a VHA treatment provider may conduct an assessment or VHA may refer out to a specialist for specific assessments.

Next, an entry is required in the "Rehabilitation Objectives" field. Here you will enter the training and employment goals. It would be a best practice to enter a description and not just the "Dictionary of Occupational Titles" (DOT) code of the Veteran's employment objective so that VHA is aware of any impact of medical needs on the Veteran's plan of services.

The "Preferred Schedule Date" field is optional. Once a date is selected from the calendar tool, it cannot be undone. When this tool is used, an entry is required in the next field, "Preferred Schedule Date Reason."

Please use care in completing the fields on this form and review your entries. Once you are certain you are done with entering the referral, you may click on "Send Medical Services Request" and the referral will be submitted into CAPRI Ch31 routing. The referral will be posted to the "Voc Rehab" tab. If an error requires cancellation of the entry, hit "Cancel" and the referral will be cancelled without entering CAPRI Ch31 routing, and the cancellation action will be posted to the "Voc Rehab" tab. You may start a new form by clicking "Add".

SLIDE 15-REFERRAL ENTRY
This screen displays the referral status on the main "Voc Rehab" tab. Immediately after a submission by VR&E, only the column labeled "Date Requested" will have an entry.

At this point, the referral is in NEW status and can be either Edited or Cancelled by VR&E – both of these actions are recorded on the "Voc Rehab" tab. If changes are necessary on a New referral, highlight the line item and hit the "Edit Request" button. The referral form will reappear and the editable fields will be displayed. If a new request is necessary, hit "Cancel" and the date/time and status will be displayed on the "Voc Rehab" tab. Start over with "Add New Request".

To summarize, New status designates a referral that is entered by VR&E. While the referral is in New status, the edit and cancel features are available to VR&E.

At this stage, the VR&E case manager will receive an email alert that the referral was submitted. An automatically generated Designated File Number or "DFN" is assigned for that referral and is included in the email to the case manager. The case manager may enter that number in the Patient Selector screen in the future, or enter the Veteran's Social Security Number or name to access the referral in the future. Simultaneously, VHA receives an alert that a new referral is waiting to be downloaded.

The next status is PENDING. Pending status means that the VHA Coordinator has downloaded the request. At this point, the request may not be edited or cancelled by VR&E. The VR&E case manager receives an email alert that the referral is now pending.

CANCELLED status indicates that VHA canceled the referral; no changes to the referral are available to VR&E.

And finally, COMPLETED status indicates that VHA completed the referral, and again, no changes are available to VR&E. These two statuses will be explained in the upcoming slides.

Lastly, the Ch. 31 referral process, to include changes in status, in CAPRI is updated upon a sequence of electronic events. The events are scheduled locally by VHA Information Technology and will typically occur on a 24-hour cycle (I.e., once a day).

SLIDE 16-COMPLETED AND CANCELLED
VR&E staff, other than the original case manager who made the initial request, may check the status of a single referral, or for several referrals within CAPRI.

To check on the status of a single referral, open the "Voc Rehab" tab in the Veteran's CAPRI record. You may also check the status of an appointment through the appointments screen on the "Admin" tab. Or as indicated on this screen, you may go to the notes on the "Clinical Documents" tab to obtain the record of medical services provided.

SLIDE 17-EDIT REQUEST
An editable referral will contain the message "NO CONSULTS FOUND" in the Consult Selected field.

Again, it means VHA has not processed it yet, and the referral may be edited or cancelled by VR&E.

SLIDE 18-REQUEST WITH CONSULT
This screen displays the referral once it has been processed by VHA. All fields are grayed-out, indicating that is no longer editable by VR&E – however, the VHA POC may access the update functionality. In the bottom right corner is an example of a consult that was created as a result of the referral.

SLIDE 19-CANCELLED REQUEST

Once a referral is submitted AND processed, only VHA can cancel it. There will be a permanent record of this cancelled request. You may find the reason for cancellation in the notes on the "Clinical Documents" tab or on the "Admin" tab for appointments.

SLIDE 20-SELECT REPORTS

CAPRI has several Reports options that allow you to pull data for a short or long period of time based on date-range selections. You find that functionality on the CAPRI main menu tool bar – select "File", "Reports", and then "VR&E Reports."

SLIDE 21-REPORT SETUP & SAMPLE

This is the "Vocational Rehab Report Setup" screen. Several options are available for a report based on a date-range span. The first date-range option allows the user to enter the values. The second date-range option allows the user to select pre-set values by calendar year, fiscal year, or all calendar years (60 month maximum). Data is available by each referral status and "All" status is an option as well. Two report formats are available – "Plain Text" or "Delimited Export Data".

Plain Text reports will appear on the CAPRI screen as you can see on this slide. The Delimited Export Data is accomplished by naming and saving a CAPRI report Text file to your computer and then by opening the file and importing it into an Excel spreadsheet.

SLIDE 22-REFERENCES

And that covers the step-by-step instructions for using CAPRI Ch31 functionality to submit an electronic request for medical services, receiving email alerts, tracking the referral and accessing reports on all referrals by Regional Office.

Here is a list of references we used to develop this training. Feel free to read all references for further detail. Also note that you may find the CAPRI User Guide by clicking on "Help" on the CAPRI menu bar.

SLIDE 23-QUESTIONS?

Thank you for participating in this learning activity on the newest CAPRI functionality for VR&E Request for Medical Services. It allows for faster processing of medical referrals, resulting in more streamlined services for our Chapter 31 Veterans.

Be sure to complete the post assessment and feedback survey in Talent Management System (TMS) to obtain credit. Also, CRC CEU credits are available. Follow instructions listed on the VR&E Training Website under the CRC tab.

Do you have questions or comments? Please send those through your local VR&E Management, who will then forward it to your respective VR&E Field Liaison Representative.

This concludes today's training. Thank you for the work you do for the Veterans participating in VR&E programs! And thank you for your time and attention to this training. Have A Great Day!