

STANDARD OPERATING PROCEDURE (SOP)

Processing Power of Attorney (POA) Forms

I. **PURPOSE:** This Standard Operating Procedure (SOP) establishes the process/procedure for processing POA Forms for Veteran Service Organization (VSO) access.

II. **DEFINITIONS:**

- A. VSO CAPRI Project – CAPRI for VSO access is a One-VA initiative that allows authorized VSO representatives read-only access to a specified claimant's VA Electronic Health Record (EHR).
- B. VSO – Organizations recognized by the VA who serve as advocates for Service Members and Veterans who help file VA claims and apply to government programs.
- C. POA Form – VA FORM 21-22 or VA FORM 21-22a which authorizes the VSO access to medical records. The POA will need to grant the VSO unlimited and unrestricted access to the medical records (including sensitive records protected by title 38 U.S.C. section 7332) since CAPRI cannot filter any information or date ranges.
- D. SHARE System – VBA corporate application that is the authoritative source of POA assignment.
- E. Restricted List – A restricted list is loaded in the claims system which is used to limit a user's access to the records of specific Veterans.

III. **RESPONSIBILITIES:**

- A. VSO
 - 1. VSOs will only submit active POAs which they have a need to view the Veteran's EHR. These POAs will be submitted by fax using the encrypted fax server, or e-mail utilizing PKI encryption.
 - 2. POA form will contain no restrictions to content or time.
 - 3. VSOs will notify NDS when the POA has been revoked or changed. The VSO will also notify NDS if access to the Veteran's EHR is no longer needed.
- B. VHA National Data Systems (NDS)
 - 1. NDS will ensure the POA form submitted contains no limitations to content or time.
 - 2. NDS will ensure the POA form is current and matches the POA assignment in the VBA SHARE system.
 - 3. NDS will upload the Veteran to the restricted list of the accredited VSO organization once the POA has been verified.

IV. **PROCEDURES:**

- A. Review POA Form for Accuracy – Check for overall legibility of content and check pertinent identifiers as follows:
 - 1. Item 1. Name
 - 2. Item 4. SSN
 - 3. Item 12 or 13. Authorization for Representatives Access to Records protected by Section 7332, Title 38, U.S.C. must be checked to indicate authorization.

4. Item 13 or 14. Limitation of Consent must have no limitations listed
5. Claimant's Signature or authorized signature
6. POA Forms with expiration dates are not acceptable

- B. Verify VSO designation is current in the SHARE System – Lookup the Veteran in the VBA SHARE application to verify that the POA is the most current POA for the Veteran and has been assigned to the appropriate VSO Organization. The application is located at: <https://vbahinescitrix.vba.va.gov/VBAPPS/auth/login.aspx>

If the POA is assigned to another Organization, and the VSO is not accredited to this organization, do not process the POA and note why in the notification email to the VSO. If the POA has been signed within 14 days and has not been entered into the SHARE system, you may proceed with processing the POA.

1. The following outlines step-by-step instructions to search for POA assignment with the VSO Organization.
 - a. The Hines web link above will take you to the VBA Terminal Server.
 - b. Log in using your NT credentials, and log into the Share Prod application with Password and Station Number.
 - c. In the VBA Ready Screen, click on Corporate Inquiries.
 - d. Enter the Patient's SSN in the Search Criteria.
 - e. Click on Submit.
 - f. In the Person tab, make sure the Claimant's name in SHARE, including the Aliases, matches the name on the form. If not, note it in the notification email to the VSO.
 - g. In the All Relationships tab, check the Claimant's POA field to verify that the correct VSO Organization has been assigned. If the POA History button is not highlighted you can view all assignments.
 - h. If no results, click Ready to take you back to the VBA Ready Screen.
 - i. Click on the BIRLS Inquiry
 - j. View the Power of Attorney field. If the correct VSO is listed, or if there is no VSO listed, you may process the POA.
2. In some cases, such as name commonality, a query with multiple identifiers, i.e. Name, Regional Office (RO) Service Number, may be required.

- C. Add Patient to Restricted List – In the HIA Registry, you will add a patient to the CLAIMS Server. You may also opt to do this using HIA Utilities tool for multiple Patient lists.

1. The following outlines step-by-step instructions to add a Patient to the CLAIMS Server
 - a. Click **Admin**
 - b. Select **Edit Patient Lists**
 - c. Click on the **Patients tab**
 - d. In the search for patient field, input SSN then press GO
 - i. If the patient's name does not appear, follow the steps below:
 - Click **Add New** which should make the box to the right turn blue
 - Enter in Name (Last, First MI)

- Fill in SSN
 - Select the patient restricted list from the drop down field
 - Click Save Changes
- ii. If the patient's name does appear, click on the list tab then the appropriate service organization and search for the patient's name. If the patient's name is in the list, note that this is a duplicate. This should be indicated in the e-mail you send to the submitter with the date access was granted. If the patient's name is not in the list, follow the steps below:
- Click on the Lists tab
 - Select the appropriate VSO Organization
 - Click **Add New**
 - Click on the yellow Name box
 - This will display the Find Patient window
 - Enter the patient's SSN in the pop-up box.
 - Click Go
 - This will locate the specific patient's name
 - Highlight the patient's name
 - Click Use Selected
 - This will populate the user name into the Yellow Name box
 - Click Save
- D. In the HIA Registry, select the appropriate VSO Organization and upload the POA images.
1. The following outlines step-by-step instructions to Upload a POA to the HIA Registry:
 - a. In the User tab
 - b. Type VSO in the yellow box, which will take you to the VSO Organizations
 - c. Select the appropriate VSO Organization for this POA
 - d. Select the Document/Images tab
 - e. Click Upload Document
 - f. This will take you to the Upload Document window for file selection
 - g. Select the file location and highlight the appropriate POA file
 - h. Click Upload File
 - i. Click Save Changes
- E. Send an email notification using one of the email templates, address to the VSO, applicable ISO and cc: VSO, HIA, and the HIA Representative. The subject line of the email should be in the format: Organization, VSO Name, POA (i.e. AMVETS, Brian Stone, POA) Alexsys #xxxx]. You will list the duplicate POA submission(s), the rejected POA submission(s) with reason for rejection, and the POA submission(s) for which access has been given, using the following templates:
1. Duplicate POA submission:

The following POA is a duplicate submission:

[Veteran Last Name], [Veteran First Name] – processed [date of original processing]

2. Declined POA:

The following POA(s) cannot be processed at this time:

[Veteran Last Name], [Veteran First Name] – [reason processing is declined]

3. Accepted POA:

The following POA has been assigned to the “[VSO List Name]” list and is available for your review:

[Veteran Last Name], [Veteran First Name]

This Veteran’s record has been added to the “[VSO List Name]” Restricted List.

Login to CAPRI and choose “[VSO List Name]” from Patient Selector (Restricted List).

Please contact me if you have any questions.

F. Move the acknowledgement message to the HIA, VSO, completed POA subfolder.

G. Before closing the Alexsys Ticket there are several fields that must be filled in.

1. The following fields need to be filled in before closing an Alexsys ticket.

- a. Number of POAs processed
- b. VSO Contact
- c. VSO Organization
- d. Owner name
- e. Click the box to indicate that the Veteran(s) have been added to the organization list.
- f. Click the box to indicate that the POAs have been uploaded in the HIA Registry.
- g. Change Status to Closed.
- h. Save.