

PATIENT INFORMATION COLLECTION MANAGEMENT (PICM) PROCESSES

- 1. REASON FOR ISSUE:** This Veterans Health Administration (VHA) Directive describes the use of Patient Information Collection Management (PICM) processes at Department of Veterans Affairs (VA) medical facilities.
- 2. SUMMARY OF MAJOR CHANGES:** This VHA Directive updates the information for the local use of PICM processes at VA medical facilities.
- 3. RELATED ISSUES:** VHA Directive 1604 and VHA Handbook 1601C.01.
- 4. RESPONSIBLE OFFICE:** The Chief Business Office (10NB) is responsible for the contents of this Directive. Questions may be addressed to (202) 382-2500.
- 5. RESCISSIONS:** VHA Directive 2011-003, dated January 28, 2011, is rescinded.
- 6. RECERTIFICATION:** This VHA Directive is due to be recertified on or before the last working day of May 31, 2021.

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Under Secretary for Health

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1. PURPOSE

This Veterans Health Administration (VHA) Directive establishes policy for the use of Patient Information Collection Management (PICM) processes at Department of Veterans Affairs (VA) medical facilities. **AUTHORITY:** 38 CFR 17.36.

2. BACKGROUND

a. Under Title 38 Code of Federal Regulation (CFR) 17.36, a Veteran who wishes to be enrolled in the VA health care system must apply by submitting a VA Form 10-10EZ, Application for Health Care Benefits. This information is used to determine Veterans eligibility, enrollment priority group, mailing address, copayment requirements, and third-party health insurance liabilities.

b. VA medical facilities and Consolidated Patient Account Centers (CPAC) must utilize Patient Information Collection Management (PICM) processes to update the Veteran's patient record in the Veterans Health Information Systems and Technology Architecture (VistA) system (see Appendix A).

c. Complete and accurate administrative and demographic data is a key component of establishing and managing a patient's record and supporting VHA business functions. See VHA Directive 1604. This Directive is available on the VA Publications Web site at <http://www.va.gov/vhapublications/>.

3. POLICY

It is VHA policy that all VA medical facilities maintain PICM processes in order to timely identify and update Veterans' administrative and demographic information.

4. RESPONSIBILITIES

a. **Chief Business Office.** The Chief Business Office (CBO) is responsible for providing education and training opportunities for appropriate staff regarding the PICM processes.

b. **Veterans Integrated Services Network Director.** The Veterans Integrated Services Network (VISN) Director is responsible for ensuring that the VISN Business Implementation Manager monitors the progress of each assigned medical facility's PICM process to ensure compliance with national policy.

c. **VA Medical Facility Director.** The VA medical facility Director is responsible for:

(1) Designating a PICM Coordinator, which may be a collateral duty, to oversee PICM activities, functions, and reports.

(2) Developing a local policy that implements this Directive and includes compliance monitors and data integrity checks. An effective local policy may include a count of inconsistencies due to improper or incomplete data entry in the following fields: Veteran's complete address; home and work telephone numbers; insurance information; next-of-kin; emergency contact; email address; and employer information.

(3) Ensuring administrative data is entered in accordance with existing VHA policy guidance. (See VHA Directive 1604, Data Entry Requirements for Administrative Data, or subsequent policy issue.)

(4) Ensuring that PICM processes have been incorporated into the facility training program (see Appendix A), and ensure that all staff involved with the collection of patient information receive the appropriate training.

d. **Patient Information Collection Management Coordinator.** The PICM Coordinator is responsible for ensuring that:

(1) Administrative data is updated in a timely fashion utilizing PICM processes. This information includes, but is not limited to, the following: addresses, personal contacts, employment and insurance information, military history, and eligibility for VA health care benefits.

(2) Well-trained staff and resources are assigned to the collection of patient information and are informed of the need for obtaining complete and accurate administrative data. **NOTE:** *Staff must not request the Veteran verify sensitive information (i.e., Social Security Number, date or place of birth, or mother's maiden name) by telephone.*

(3) Information for patients who cannot be reached prior to their appointments, who prefer to give information in person, or who are seeking urgent or emergent care is updated at the point of service or on the same day of the appointment. However, efforts should be concentrated on obtaining the information before the day of the appointment.

5. REFERENCE

Title 38 CFR 17.36.

APPENDIX A

PATIENT INFORMATION COLLECTION MANAGEMENT (PICM) PROCESSES

- 1. VA Form 10-10EZR, Health Benefits Update Form Option.** Veterans can update their patient record using VA Form 10-10EZR. Veterans can update their personal, insurance, or financial information by submitting the completed form to VA online, by mail or fax, or in person. This form is available on the VA Forms Web site at: <http://www.va.gov/vaforms/>.
- 2. Point of Service Option.** Veterans can update their patient record at any VA point of service on the same day of the appointment through a face-to-face interview or a centralized check-in station. Producing and maintaining complete and accurate data in the Veterans Health Information Systems and Technology Architecture (VistA) system decreases rework, delays, and frustrations for Veterans and VA medical facility staff.
- 3. Kiosk Option.** Veterans can update their patient record on a VetLink kiosk at the VA medical facility, if available. Veterans can use the self-service kiosks to check-in for previously scheduled appointments, view their account balance, print an appointment itinerary slip and update their health information (i.e. contact, demographic, or insurance information). Obtaining correct addresses helps to ensure that VA is able to communicate important information to Veterans.
- 4. Pre-registration Option.** VA medical facilities can update the Veteran's patient record utilizing the Pre-registration software. Reminding patients of their scheduled appointments helps improve patient care by reducing the no-show rate. See VHA Procedure Guide 1601B.01 at: http://vaww.va.gov/CBO/apps/policyguides/contents.asp?address=VHA_PG_1601B.01.
NOTE: *This is an internal VA Web site that is not available to the public.*
- 5. Electronic Insurance Option.** VA medical facilities and CPACs can update the Veteran's insurance information utilizing the Insurance Capture Buffer (ICB) software and the Electronic Insurance Verification (eIV) software. Gathering and updating insurance information affords Veterans the benefit of their insurance plan and may decrease or eliminate their VA copayment and increase the VA medical facility's revenue. See VHA Handbook 1601C.01. This Handbook is available on the VA Publications Web site at <http://www.va.gov/vhapublications/>.
- 6. VistA Queries.** VA medical facilities can update a patient's record by inquiries in the VistA system and this may only be submitted by an authorized VHA employee. This is especially beneficial for Veterans who are traveling and need care at another VA medical facility. See VHA Procedure Guide 1601A.01 at: http://vaww.va.gov/CBO/apps/policyguides/contents.asp?address=VHA_PG_1601A.01.
NOTE: *This is an internal VA Web site that is not available to the public.*