



Personnel & Readiness Information Management

Department of Defense (DoD)/Department of Veterans Affairs (VA) Data Sharing Summit

ACTION ITEM TEMPLATE SLIDES

October 30, 2012
Alexandria, VA



Agenda

Time	Topic	Presenter
8:30-8:40	Welcome and Opening Remarks	Mr. James Neighbors (DoD) Mr. Jack Kammerer (VA) Mr. Robert Reynolds (VA) Mr. Michael Lincecum (DoD)
8:40-9:30	iEHR & STR Action Item Status Updates (5 min each)	Action Leads
9:30-9:40	Break	
9:40-10:30	DD 214, VADIR, & Other Action Item Status Updates (5 min each)	Action Leads
10:30-10:40	Break	
10:40-11:15	Milestone Tracking Diagram and Recap	Facilitator
11:15-12:15	Lunch Break	
12:15-1:15	IDES IT Presentation	Mr. Joe Paiva and Facilitator
1:15-1:25	Break	
1:25-2:25	New Topics/Actions Discussion	Facilitator
2:25-2:35	Break	
2:35-3:25	Discussion and Recap	Facilitator
3:25-3:30	Way Ahead and Closing Remarks	Mr. James Neighbors (DoD) Mr. Jack Kammerer (VA) Mr. Rob Reynolds (VA) Mr. Michael Lincecum (DoD)

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Personnel & Readiness Information Management

Department of Veterans Affairs (VA) enterprise Customer Relationship Management (CRM) Migration

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November 2012



Agenda

- ▶ What does this mean for IDES
 - Challenge
 - Our Charge
- ▶ Review Background
 - VA's problem
 - Intersection with interagency care coordination efforts
 - eCRM implementation
- ▶ Decision on the way forward
 - Courses of Action
 - Review proposed architecture

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The IDES “Big” Picture

► The Challenge:

- Integrated Disability Evaluation System (IDES) provides a single disability examination and a single-source disability rating that both Departments use in executing their respective responsibilities for 30,000 transitioning Service members per year.
- The IDES process combines VA and DoD non-clinical care and administrative activities, case management, and counseling requirements associated with disability case processing.
- The goal is consistent evaluations, faster decisions, and timely benefits delivery for those medically retired or separated.

► Our Charge:

- Leverage technology to enable a warm handoff from DoD to VA.
- Improve current technology capabilities for case managers in the field to include increased client management, case management, and workload tracking.
- Increase Service member and Veteran transparency of the IDES process through connection with eBenefits self service capabilities.
- Enhance reporting and dashboard capabilities.

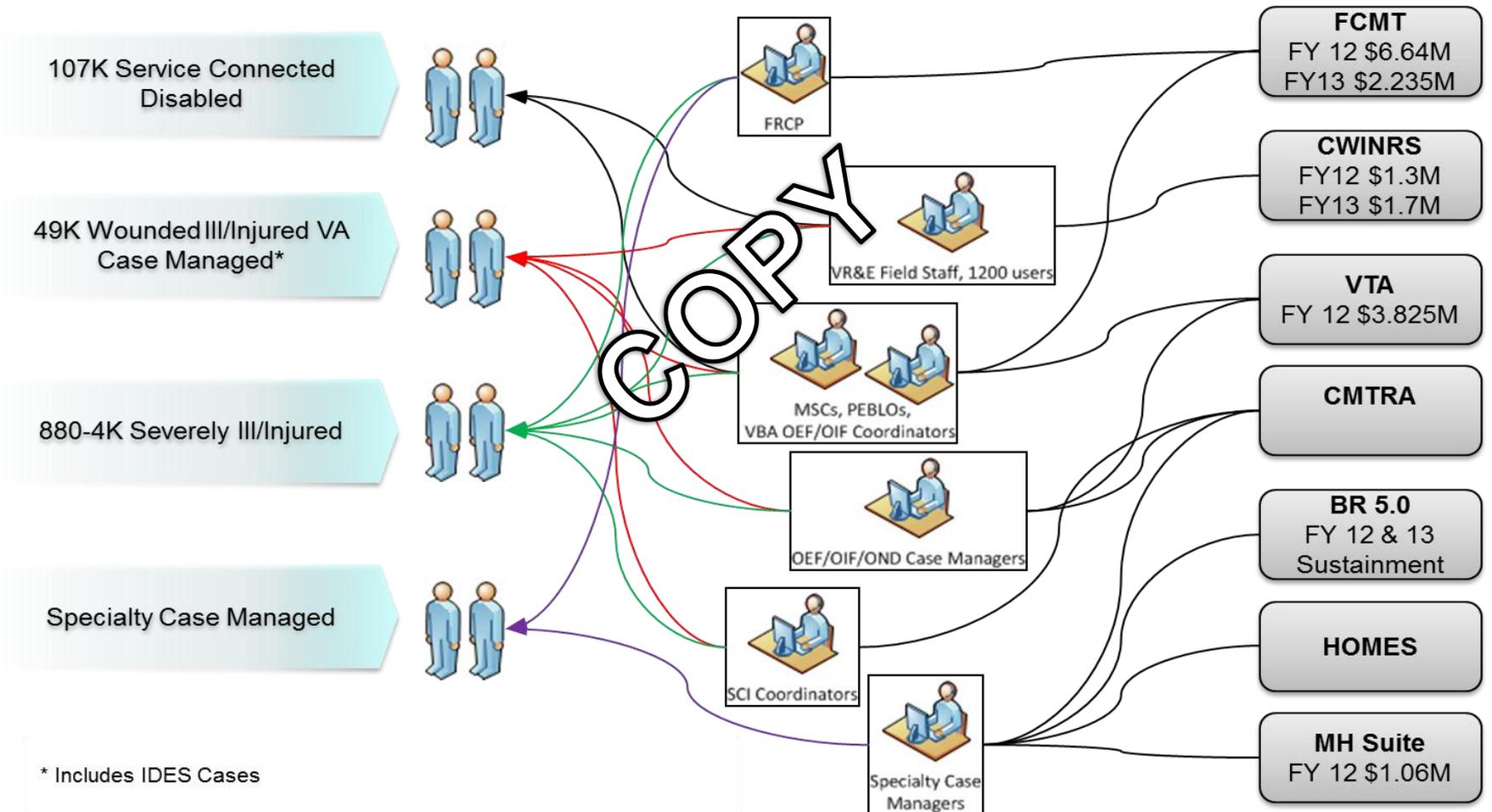


VA's Problem

- ❖ **Root Cause:** VA has over 10 stove piped systems that provide similar case management and care coordination capabilities.
- ❖ **Problem #1:** As a result, Veterans and Service members, who may be part of overlapping cohorts within the larger, common population, may receive disjointed and uncoordinated services.
- ▶ **Problem #2:** VA cannot afford to sustain, enhance, or integrate all of the redundant systems, as required to meet users and Veteran needs.



Snap shot of the case management environment





Highlight: Inventory of a subset of existing care coordination/customer relationship management (CC/CRM) systems; economic environment limits VA's ability to integrate, enhance, or sustain all these systems

VA & DoD Care Coordination, Case Management, and Benefits Counseling IT System Inventory						
	System Name	System Status	Owned by	Used by	# of Active Cases	# of Registered Users
Used for Care Plan and Client Tracking	Army Warrior Care and Transition System (AWCTS)	In Production	Army	Life Insurance Special Outreach Program	>47,000	>13,400
	Federal Case Management Tool (FCMT)	In Production	VA	Federal Recovery Coordination Program (FRCP)	904	44
	Recovery Coordination Program Support Solution (RCP-SS)	In Production	OSD	USMC Wounded Warrior Regiment Recovery Care Coordinators, Air Force Warrior and Survivor Care, and the Recovery Care Coordination (RCC) Program	3,830	255
Used only for Client Tracking	Air Force Wounded Ill and Injured Case Management System (AFWIICMS)	Development	Air Force	Air Force Wounded Warrior Program and the Air Force Survivor Care and the Air Force Wounded Warrior Program	Not Available - System Still in Development	Not Available - System Still in Development
	Blind Rehab 5.0	In Production	VA	Blind/Visual Impairment	Not Available	Not Available
	Care Management and Tracking Application (CMTRA)	In Production	VHA	VHA Case Management and Social Work Services (OIF/OIP), Wound Care Management Program) and specialty case managers such as Polytrauma, Spinal Cord Injury, Women's Health, VIST	50,000	3,572
	Homeless Operations Management and Evaluation System (HOMES)	In Production	VHA	VHA Homeless Veterans Services/Health Care for Homeless Veterans (HCHV) Outreach	90,000	1,200
	Marine Wounded Ill and Injured Tracking System (MCWIITS)	In Production	Marines	USMC Wounded Warrior Regiment Call Center and Contact Cells, and the USMC Wounded Warrior Regiment District Injured Support Coordinators	26,589	Not Available
	Maternity Care Coordination Tool	In Planning	VA	Women Veterans Program	Not Available - System Still in Planning	Not Available - System Still in Planning
	Navy Nonclinical Case Management System (NNCMS)	In Production	Navy	Navy Safe Harbor (Navy/Coast Guard Wounded Warrior Program)	281	45
	SPAN	In Production	VHA	Suicide Prevention Program	Not Available	1,028
	Veterans Tracking Application (VTA)	In Production	VA	VBA OEF/OIF/OND Program, VA Liaison for Healthcare, and the Integrated Disability Evaluation System	41,616 Cases and 33,851 Referrals	2,999
	Used only for Care Planning	Mental Health Suite	In Production	VA	Mental Health Case Management Services and the Suicide Prevention Program	Not Available
Used for Benefits Delivery Tracking	Corporate WINRS	In Production	VBA	VBA Vocational Rehabilitation (VetSuccess)	112,684	1,500
	Disabled Outreach Tracking System (DOTS)	In Production	VA	Life Insurance Special Outreach Progra	7,000	25

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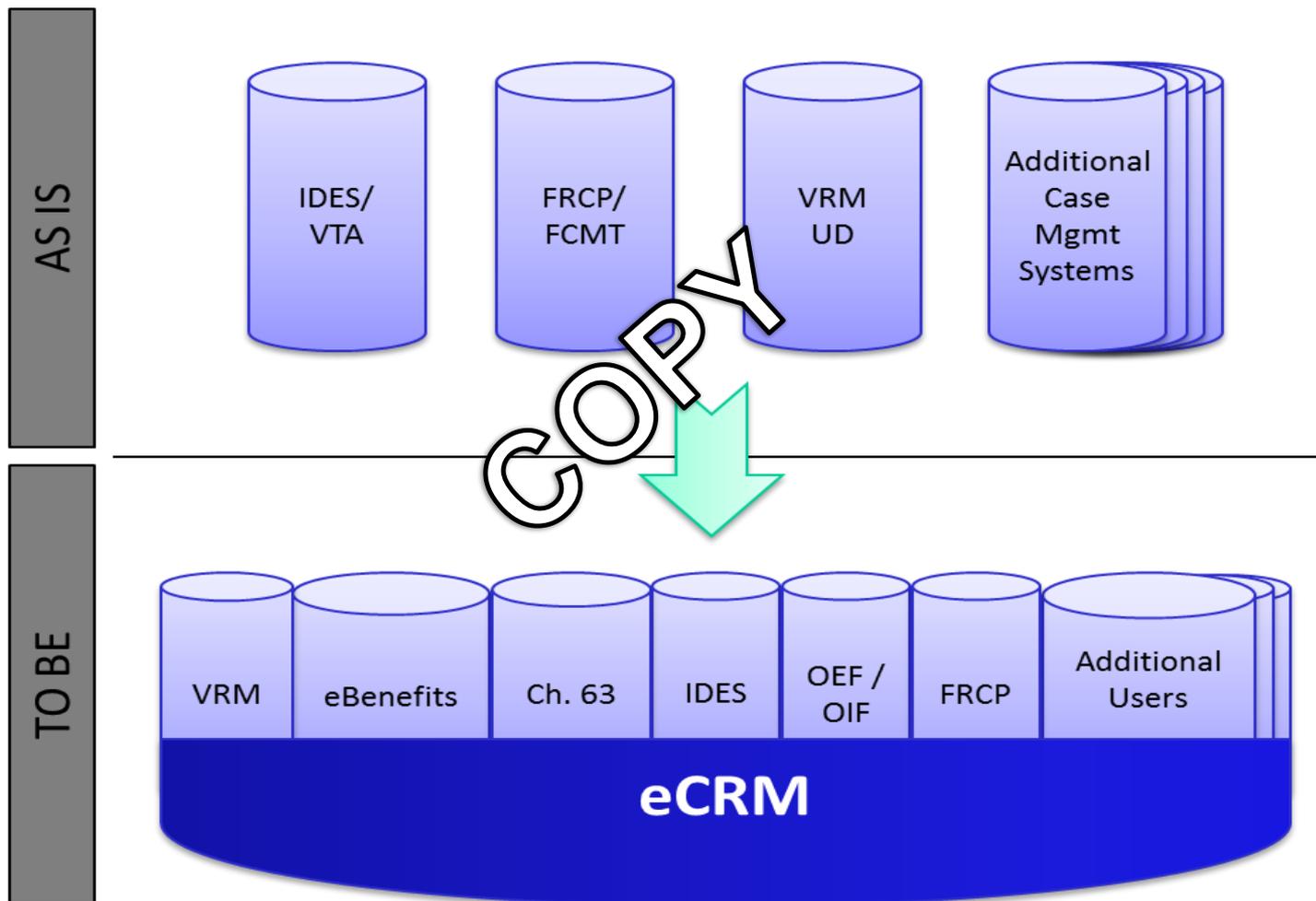
Interagency Care Coordination Committee (IC 3)

- ❖ Consistent with the Joint-Secretaries' Intent for Warrior Care Coordination memo dated September 27, 2012, VA is implementing an enterprise Customer Relationship Management (eCRM) to help drive a common operating picture developed and shared by both Departments, and visible to the patient, family, and care management team.
- ❖ The IC 3 findings support the need for a common technology solution to address the following areas:
 - ❖ Authoritative source / information repository
 - ❖ Elimination of duplicate data entry into multiple systems
 - ❖ Scalable interfaces across VA and DoD communities/solutions

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VA's Decision to establish a eCRM





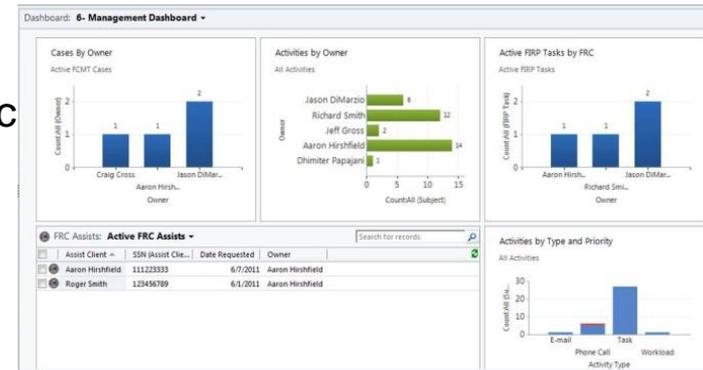
Federal Case Management Tool (FCMT)/ eCRM

The Federal Case Management Tool (FCMT) is a system, build on the eCRM, currently used by VA care and case managers:

- DoD/VA Federal Recovery Coordinators use FCMT to automate case management activities such as intake, referral and enrollment; creation and maintenance of case records, plans, performance reports. This program provides support for the recovery, rehabilitation, and reintegration of severely injured, ill or wounded Service members and Veterans.

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- Develops a Service member and Veteran-centric common operating picture by supporting the exchange of shared case management information across various programs.



- Currently migrating additional users to include VHA and VBA case managers with enhanced case management and communication functionality.



FCMT Capabilities

Key Capabilities

- ▶ Ability to store and manage Veteran / Service Member and family contacts related to a Case; lookups currently supported from VADIR
- ▶ Ability to create and manage a “Case” and associated activities, plans, etc. from start to finish
- ▶ Built-in workflow for case creation, status approvals, notifications, etc. for automation support, where required. Easily extensible based on program business-rules.
- ▶ Multiple flexible navigation and reporting mechanisms for a complete view of case management process (Dashboards, Canned / Ad-hoc reporting, “favorites”, etc.)
- ▶ Linked to eBenefits for Veteran self-service (view recovery plan)

Case Management Processes Supported

Client Management

- Search for Service Member / Veteran
- Register a new client

Case Management

- Create / Read / Update Case
- Search Case
- Update Case Status
- Maintain Case Locations
- Maintain Medical Information
- Maintain Recovery Plan (Goals, Tasks, etc.)

“My Work”

- Work Assigned Activities
- View Dashboards and Ad-hoc reports

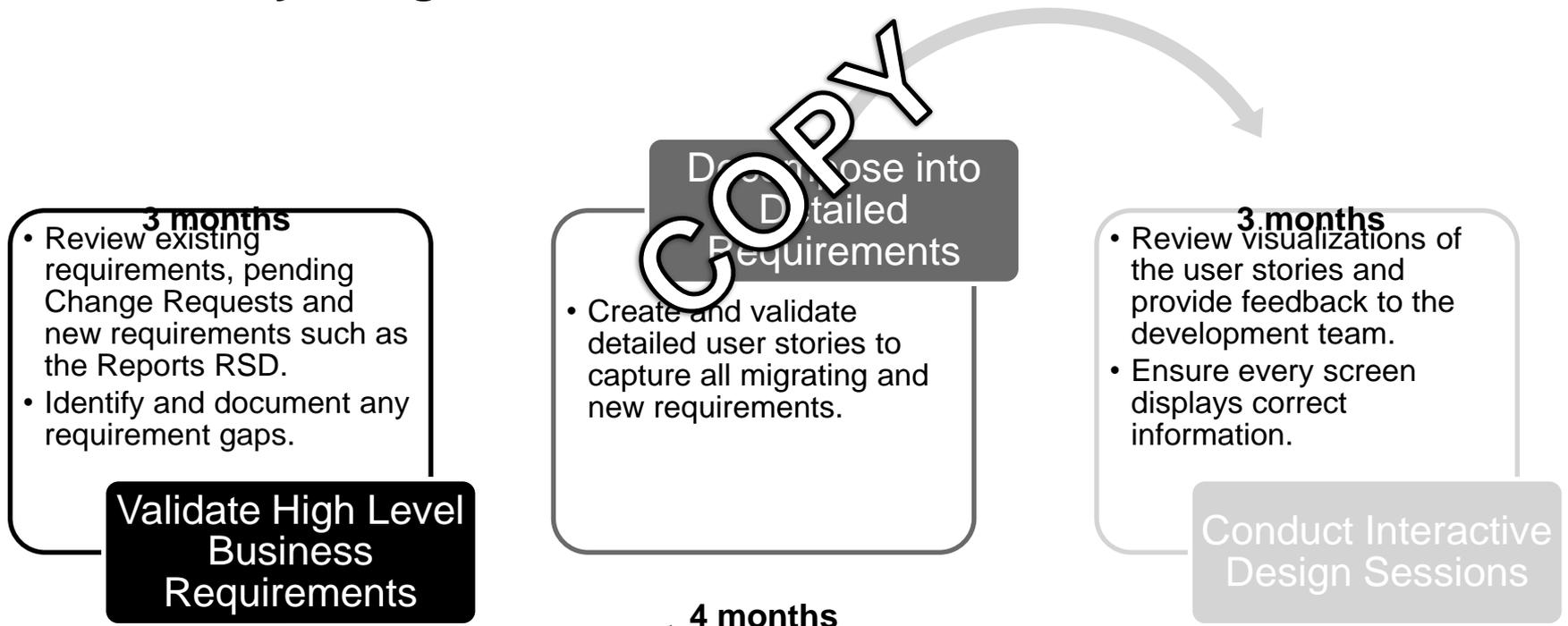
Workload Management

- Case Assignment
- Approvals
- Performance Reports



Process for new users?

- ❖ We work collaboratively with the business to ensure all requirements are fully identified, documented and detailed. Weekly design sessions are held.



****All durations are estimates only and dependent upon the active engagement and availability of the business stakeholders.**



Courses of Action

- ▶ **COA #1:** Develop web services required to “interface” military department system(s) with VA’s eCRM; including services to meet joint requirements (i.e reporting, care plan “CRUD”)
- ▶ **COA #2:** Option to migrate; VA support military interest in migrating to VA’s eCRM
- ▶ **COA #3:** Identify minimal VTA enhancements for 1 increment (minimal “reports”, limited system-to-system sharing); focus remaining resources on accelerating user migration to the eCRM platform

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What do we need from you...

- ❖ Empowered representation
- ❖ Time commitment
- ❖ Agreement on the way forward

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BACKUP SLIDES



Microsoft Dynamics CRM for Case Management: Background

- ▶ **2010 and early 2011:** The Office of Information and Technology (OI&T) analyzed the non-clinical case management vendor marketplace for tools that would be suitable for the Federal Recovery Care Program (FRCP) needs – and for other potential users.
- ▶ **January 2011:** OI&T started presenting these tools with case management groups within VA.
- ▶ **May 2011:** The FRC Program formally agreed to be the first pilot users of the new system, called FCMT, leveraging CRM technology being implemented by the Veterans Relationship Management (VRM) Initiative.
- ▶ **June 2011:** The VLER Warrior Support team briefed the VTA stakeholders on commencing the planning of the migration of future VTA modules (VBA, VHA and IDES) to MS Dynamics.
- ▶ **Dec 2011:** VRM Rollout Pilot, VBA National Call Center (NCC)
- ▶ **June 2012:** FRC Program successfully migrated from VTA to FCMT; VTA VHA/VBA migration planning began.
- ▶ **Oct 2012:** Completed VHA/VBA Requirements and Prototype needed for migration



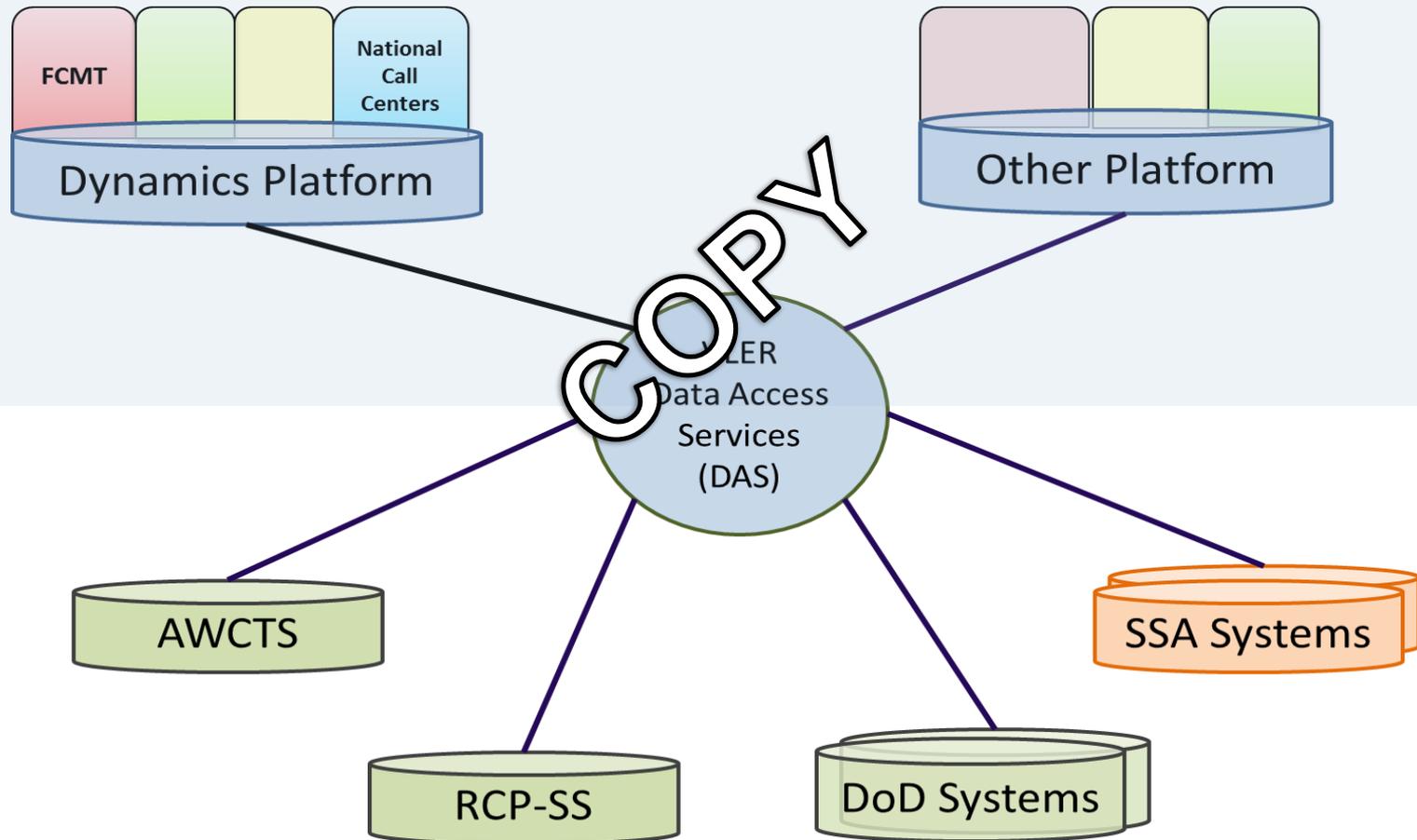
Veterans Tracking Application- Legacy

- ▶ VTA was developed by VA as a joint application for use by both VA and DoD in response to the VA need for an authoritative electronic data source to track health care services and benefits ultimately provided for seriously injured or ill Operation Enduring Freedom and Operation Iraqi Freedom (OEF/OIF) SMs and Veterans that originate via the IDES process.
- ▶ VTA helps meet the pressing need of VA and DoD users to access, document, and track all POC cases within their jurisdictions in accordance with current user roles defined for regular IDES cases.
- ▶ VTA is currently supported by sustainment funds for FY13

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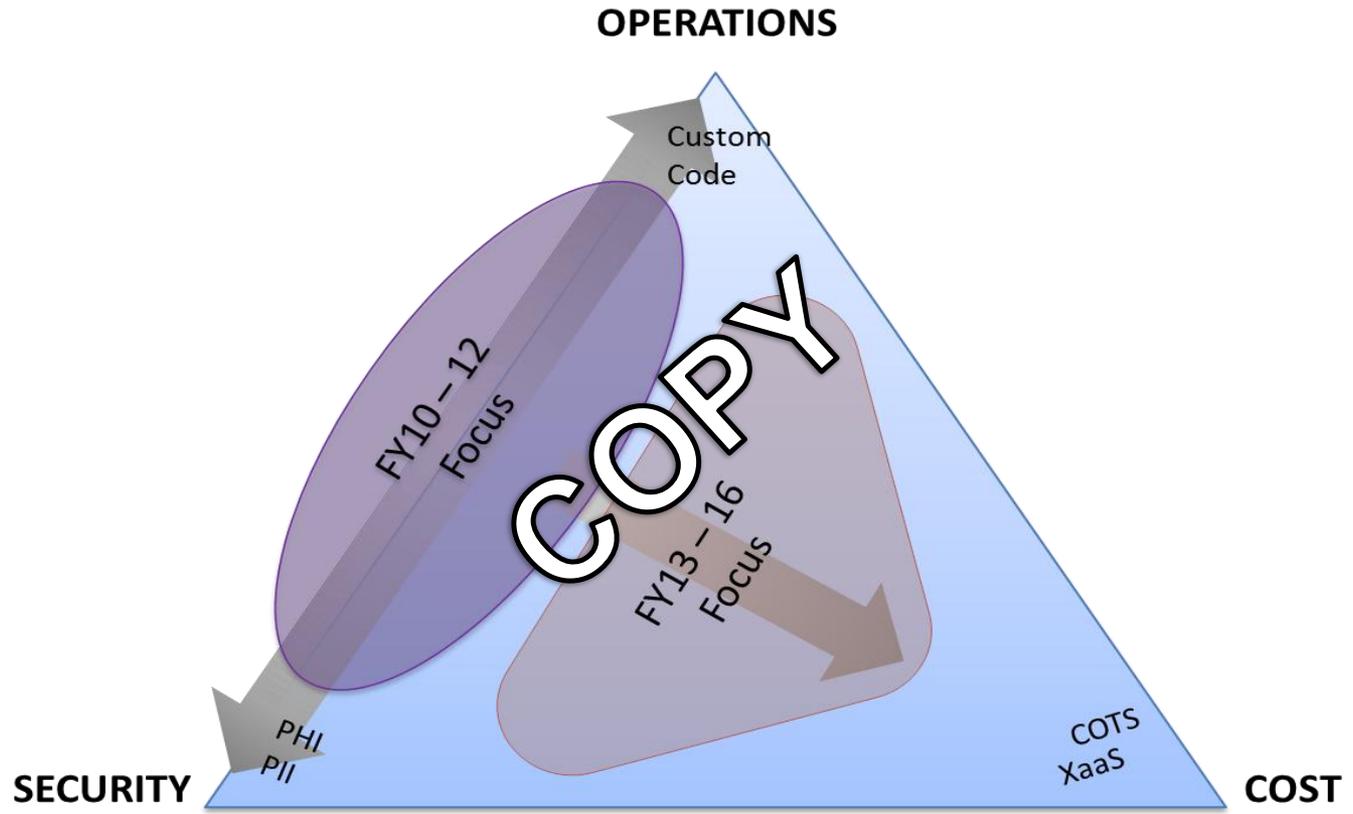


Highlight: *Future Notional Architecture*





VA's Economic Transformation





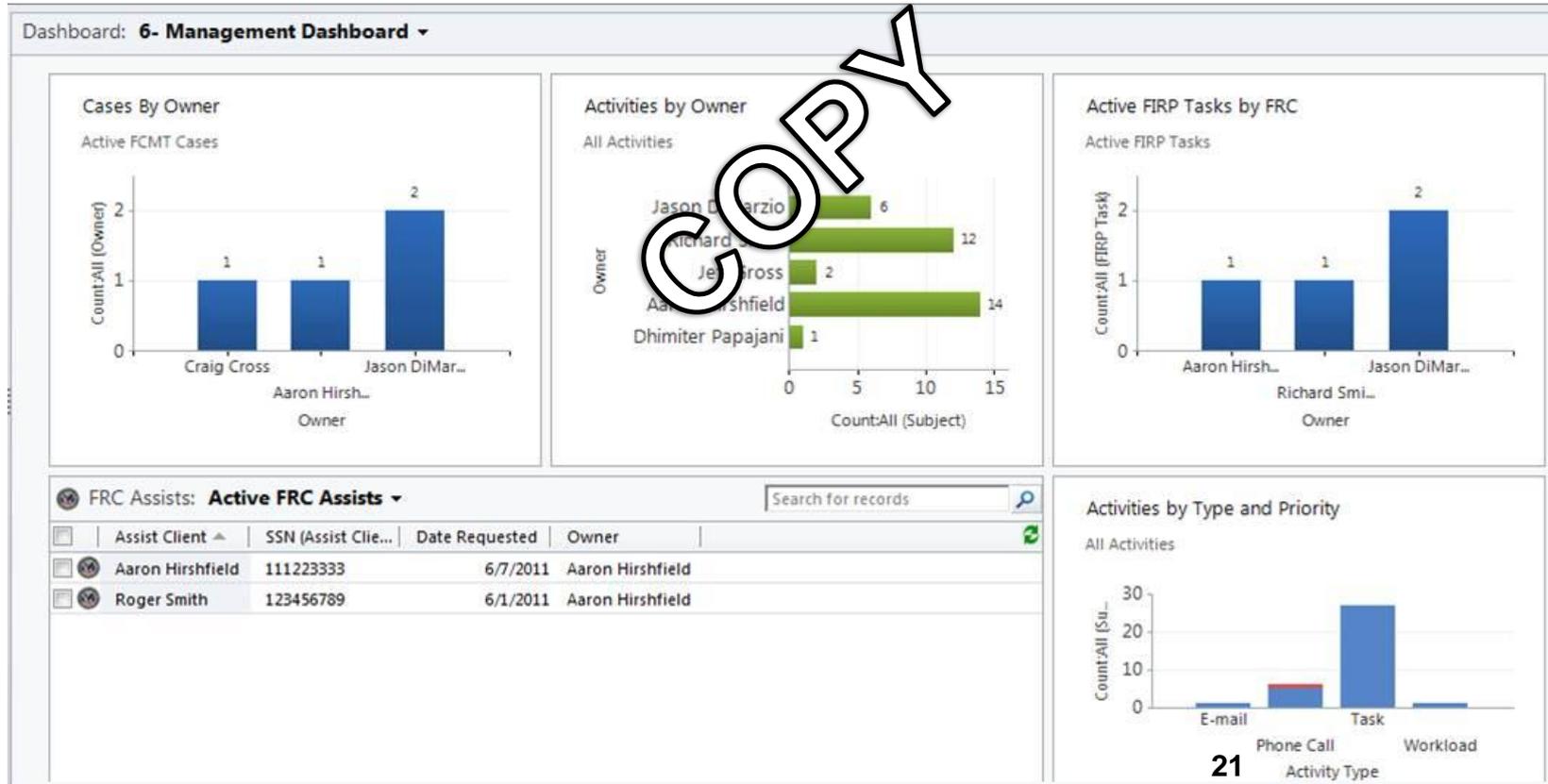
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ECRM VISUALS



FCMT Dashboards example

- Management Dashboard visualizes the load on each FRC
- Bars can be used to drill into the details and be re-group by different attributes
- Format is configurable at the user level and charts can be created by end users





Client Management

- Utilizes standard header throughout application
- General contact information pre-populated by the source system
- Standard forms and web controls added to the form using drag and drop functionality
- Contact screen supports all contact types – Service Members, Family, Legal, Caregivers

 Contact Contacts
Joe Malone - 333990088
 Contact Type
 Client

Client: **Joe Malone - 333990088** Home: **123-456-7890** Branch/Rank: **Navy / E-5 Star** Admin
 Gender: **Male** Mobile: **111-222-3333** Location: **Boston**
 SSN: *****-**-0088** Work: **423-235-5675** Component Status: **Regular**
 DoB / Age: **4/2/1983 ()** Primary Caregiver: Secondary Caregiver:

General
Contact Information

First Name *	<input type="text" value="Joe"/>	Gender	<input type="text" value="Male"/>
Middle	<input type="text" value="Earnest"/>	E-mail	<input type="text"/>
Last Name *	<input type="text" value="Malone - 333990088"/>	Preferred Method of Contact *	<input type="text" value="No Preference"/>
Date of Birth *	<input type="text" value="4/2/1983"/>	Language	<input type="text" value="English"/>
Age	<input type="text" value="28"/>	Other Language	<input type="text"/>
Race	<input type="text"/>	Marital Status	<input type="text"/>
Ethnicity	<input type="text"/>	Number of Dependent Children	<input type="text"/>
Mobile Phone	<input type="text" value="111-222-3333"/>	Home Phone	<input type="text" value="123-456-7890"/>
		Work Phone	<input type="text" value="423-235-5675"/>

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Case Management

- Utilizes standard header throughout application
- Container entity that shows all interactions with Client and Client Contacts
- Can be converted into a case of type Assist if the Service Member does not qualify for the program
- Case Log summarizes all interactions between the user and the client

FCMT Case
FRCP-000159 - Joe Malone - 333990088

FCMT Cases

Client Information

Client: **Joe Malone - 333990088** Home: **123-456-7890** Branch/Rank: **Navy / 5-Star - F Admin**
Gender: **Male** Mobile: **111-222-3333** Location: **Boston**
SSN: *****-**-0088** Work: **423-235-5675** Component Status: **Reg**
DoB / Age: **4/2/1983 ()** Primary Caregiver: Secondary Caregiver:

General

FCMT Client* Owner*
Acuity Score Case Status
Description
Death Date if Deceased

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Medical Information Tracking

- Allows user to filter the screen to only show areas they need by clicking injury checkboxes
- Multi-select option boxes allow for easy data entry
- Form has embedded field definitions and quick access to terminology from the form

Medical Information
 FRCP-000159 - Joe Malone - 333990088 - Medical Information

Medical Information

Wounded Ill/Injured Categories

Abdominal Chest Genitourinary Sense Loss
 Amputation Comorbidity Malnutrition Spinal Cord
 Burn Fracture Psychological Traumatic Brain Injury
 Other

AIS Scores

Head & Neck: 3
 Abdomen/Pelvic Contents: 2
 Total Score: 27

Face: 3
 Extremity/Pelvic Contents: 2
 Chest: 3
 External: 3

Abdominal Injuries

All Abdominal Injuries: Kidney, Large Intestine, Pancreas, Spleen, Stomach, Unspecified/Unknown

Selected Abdominal Injuries: Liver, Small Intestine

Amputations

Amputation Location: [dropdown] Amputation Type: [dropdown] Amputation Position: [dropdown]

New Amputation

Amputation Location	Amputation Type	Amputation Position
<input checked="" type="checkbox"/> Fingers	Thumb	Left
<input checked="" type="checkbox"/> Other	Partial Foot	Right

1 - 2 of 2 (0 selected)

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FIRP Task Creation

- Utilizes tree view control that allows users to traverse through a standard library of recovery tasks
- Tasks in the library can hold default data to decrease the time to create
- Filter allows free text searching in the tree to alleviate clicks
- Alert dates drive stoplights in grids so users know quickly if tasks are becoming due. The dates are configurable by the user.

▼ Add Tasks

Filter Tree By Task Name:

- ▲ FIRP Task Library
 - ▲ Career
 - ▲ Gain Employment
 - ▲ Career Counseling
 - Discuss Process
 - ▲ Daily Living
 - ▶ Enhance mental health
 - ▲ Explore financial needs
 - ▲ Auto Grant
 - Discuss Processes
 - ▶ Family
 - ▶ Finances
 - ▶ Health
 - ▶ Legal
 - ▶ Military
 - ▶ Spirituality
 - ▶ VA

Status *

Responsible Type

Responsible Agent *

Alert For *

Client *

Start Date *

1st Alert Date *

2nd Alert Date

Expected End Date *

Expected Duration *

Include on Printed FIRP

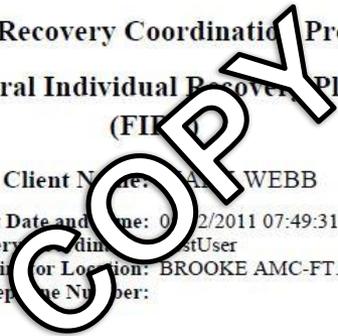
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eBenefits Integration

- Allows Service Members to access to the data through the eBenefits website
- Read-only access today with plans to allow users the ability to manage their own plans in the future

Federal Recovery Coordination Program
 Federal Individual Recovery Plan
 (FIRP)
 Client Name: JAMES WEBB
 Print Date and Time: 04/22/2011 07:49:31 AM CT
 Federal Recovery Coordinator: [Redacted] User
 Federal Recovery Coordinator Location: BROOKE AMC-FT. SAM HOUSTON
 Telephone Number: [Redacted]



Increase career opportunities - *Career Counseling*

POC	Start Date	Status	Target Date
Contact170 TestName	04/13/2011	Completed	04/19/2011
Schedule appointment with DOL representative			
Contact169 TestName	03/24/2011	Completed	04/27/2011
Schedule appointment with career counselor			

Maximize family support - *Caregiver*

POC	Start Date	Status	Target Date
Contact169 TestName	05/12/2011	On Hold	05/20/2011
Determine resources currently being utilized			
	05/11/2011	Not Started	05/18/2011
Educate caregiver on resources			
Contact169 TestName	05/12/2011	In Progress	05/20/2011
Identify needs			