

IDES Case File Transfer

Version 1.1

**Requirements Specification Document
Transfer Application**



October 2011

Revision History

Date	Revision	Description	Author
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11/7/2011	1.0	Approvals obtained;	Gibbs, Ron; updated revision Dee Dee Gardner
1/31/2012	1.1	Revisions for detail requirements elaboration requested by EPMO	Gibbs, Ron et al

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1. Introduction

The Department of Veterans Affairs (VA) and Department of Defense (DoD) Collaboration Service under the Office of Policy and Planning (OPP), in conjunction with the Virtual Lifetime Electronic Record (VLER) Warrior Support Program and the Integrated Disability Evaluation System (IDES), have identified an immediate need to replace the physical transfer of paper case file documents between DoD and VA Entities. The goal is to reduce costs associated with the physical movement of the paper case file and to make the case file documents available to those who need them in a reduced timeframe.

1.1. Purpose

The purpose of the Requirements Specification Document (RSD) is to document and describe the known IDES Case File Transfer. The IDES Case File Transfer is the physical movement of a case file of documents between responsibility areas of IDES. The requirements were elaborated with the stakeholders, members of the requirements team as directed by the VLER Enterprise Project Management Office (EPMO).

This document is intended for use by Program Management, Architects, Development, Analysts, Software Quality Assurance (SQA) Analysts, and other project stakeholders to gain an explicit understanding of functional requirements needed to support the IDES Case File Transfer.

1.2. Scope

The IDES team met with stakeholders and identified requirements to meet intermediate term needs to eliminate the physical transfer of paper between IDES responsibility areas as specified by business 10.1, 10.2 and 10.4.

Figure 1 – Business Needs

	BN10: Capabilities implemented post near-term 6-12 months out; designed to extend the IDES Initial Remodel approach to additional sites. In this phase, systems/services must include interfaces to electronically exchange information between VA and DoD and other associated entities. **Note: These items do not comprise the full-range of functionality needed by the business community for the Mid-Term Phase; they represent their best assessment as of the time of document approval and require further analysis/elaboration.			
		10.1	Consolidate authoritative source data so that they feed into a single location for easy retrieval, viewing, editing, manipulation, reporting and storage as needed.	High
		10.2	Provide paperless systems for use by all users (VA/DoD) to establish a virtual claim/case file so that duplicate data entry is reduced/omitted.	High
		10.3	Provide business intelligence functions that allow for forecasting, workload analysis, and other analytics as needed.	High
		10.4	Provide an electronic document repository that is accessible by all IDES and POC users; where in-case processing documents could be generated, shared, edited, and viewed by all authorized IDES and POC users, based on their roles and responsibilities.	High

		10.5	Provide interfaces with Military Department systems, VA and other secondary systems for increased automation.	High
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This specification is addressing the business requirements specified in 10.1 (consolidated source), 10.2 (paperless systems) and 10.4 (document repository) looking specifically at intermediate (mid-term) system requirements. The scope of these system requirements is limited to the elimination of the physical transfer of the paper case file and VA Claims File between entities. It does not address the full range of business requirements that BN 10 encompasses i.e. a complete Records Management System which is understood to be the overall long term goal of the IDES.

2. Overall Specifications

The goal of these specifications is to replace the physical transfer of paper documents between the DoD and VA, but is not limited to this use. It is understood that both organizations have other mechanisms either in development or already in place for sharing records within their own organizations.

Any reference to the implementation of the solution for Case File Transfer is referred to in this document as “Transfer Application” which is not intended to be the official application name. This is due to the fact that requirements in this document may be implemented by other applications therefore an application name preference could not be determined. The naming, if an application is developed, will come out of the design phase.

An explanation of the following systems is offered as overview, but this specification elaborates requirements that are not sufficient enough to meet the definition of either document management or records management.

Document Management

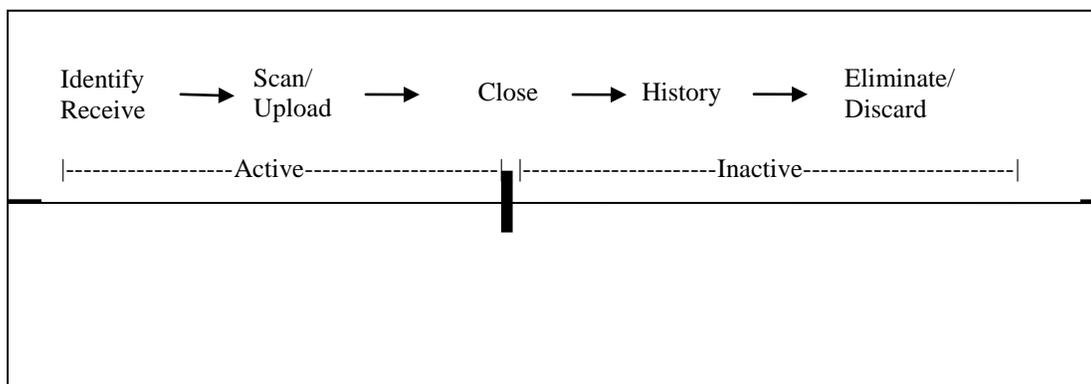
Document management systems focus on providing faster search and retrieval of captured documents and to reduce the physical space required to store these documents. Records Management systems always cover document management, but document management does not necessarily always address all of the needs of records management.

Records Management

Records Management is a system that enforces organization wide policies using records management software to track and store records. Its goal is to improve efficiency in the storage, retention and disposition of records. A record is defined as “recorded information produced or received in the initiation, conduct or completion of an institutional or individual activity” as defined by the International Council on Archives (ICA). The lifecycle as defined is portrayed in Figure 2.

Figure 2 - Records Lifecycle

Records Lifecycle



The requirements elaborated by the working group as part of the Case File Transfer phase of requirements gathering limited the scope to the point of Close in the diagram above.

2.1. Accessibility Specifications

Any and all user interfaces developed for IDES Case File Transfer will be fully compliant with Section 508 specifications and Clinical Context Object Workgroup (CCOW) standards as defined by the Federal mandate and adopted by the VA.

2.2. Business Rules

The following business rules are global rules that apply to all process flows described in the Appendices.

1. In all cases of display of a Social Security Number only the last four digits will ever be displayed.
2. Any input of a Date of Birth cannot be future dated.
3. All forms of date will take the form MMDDYYYY.
4. All process flows include the checking of permissions by role as defined by [Appendix F](#).
5. Default metadata such as Created By, Modified By, Creation Date and Time, Modified by are to be maintained for the Service Member File and the Service Member Case File in the tree structure defined by [Appendix G](#). Default metadata that is applicable should be included and is not limited to this list.
6. Any reference to Social Security Number is a reference to the last four digits only.
7. At any time in a functional process the actor can select to see the available help information.

2.3. Design Constraints Specifications

This section documents the constraints that influence the design of the IDES Case File Transfer system referred to as the Transfer Application. The IDES Transfer Application will comply with the following specifications:

- All known Personally Identifying Information (PII) regulations shall be complied with, for the use and disclosure of individually-identifiable information and individual's rights in regards to PII data; this includes State, Federal and DoD laws, rules and regulations.
- The system shall maintain user management to existing and any new applications shall include role based access and security permissions with appropriate authentications – this includes, but is not limited to administrator, guest, claims raters, etc.
- VHA must comply with the VHA Privacy rules when creating, maintaining, using, and disclosing individually-identifiable health information¹.
- DoD must comply with DoD Privacy Rules contained in DoD 6025.18-R² when creating, maintaining, using, and disclosing individually-identifiable health information for service members.
- The development of any tools, repositories, or applications in support of the transmission of the release of health information to and between DoD and VA must adhere to the DoD and VHA Healthcare Identity Management (IdM) enterprise requirements, to ensure that the integrity of the patient correlations is of the highest level and that no degradation of VHA patient information is experienced.
- Compliance with the Office of General Counsel (OGC) requirements regarding due diligence, namely ongoing record review, to detect the presence of protected conditions not originally included in the authorization.
- VHA must comply with the VHA Identity Management rules for person search outlined in Section 6 of Identity Management Business Requirements Guidance. This document can be found at <http://vaww.vhaco.va.gov/dataquality/identitymgmt.htm> under “HC IdM Links.” This document also amplifies other Identity Management Enterprise Requirements.
- The Service Member Case File tree structure defined in [Appendix G](#) is a fixed structure and cannot be re-ordered or depicted in a different manner without permission from the customer. The structure is reflective of work flow for the IDES process.
- The removal of records from the Transfer Application will be accomplished in the following manner. The following process frequency will be determined at a later time when more information on the size of the application repository and record deletion requirements are expanded. The process is as follows:
 - The customer is responsible for delivering a list of Service Member Case File identification numbers to a pre-determined location.
 - The system shall process this list and delete the associated Service Member File.

Note: An index must be maintained between the Service Member Case Identification (IDES) and the Service Member File ([Appendix G](#)). This is the only link between the two applications. The Service Member Case Identification also known as the IDES Case Number is currently produced by VTA.

¹ VHA HANDBOOK 1605.1 Privacy & Release of Information

² <http://www.dtic.mil/whs/directives/corres/pdf/602518r.pdf>

- The customer requires that the Transfer Application be able to restore a deleted file or files.
- The customer requires that the creation of an application user profile be initiated through the Veteran’s Information Portal (VIP) or a portal that provides the same application request information and that authentication is performed for the Transfer Application through the VIP or equivalent as is done with VTA.
- The customer would like to be able to highlight multiple files and have them bulk print. For example: The customer would like to be able to navigate to a Service Member Case File Folder and select all of the files with the same extension and the select “Print” and have all of the selected files print without having to open the owning application. This is not an actual design constraint, but is considered a “nice to have”.

2.4. Disaster Recovery Specifications

The system will rely on the Disaster Recovery and Concept of Operations (CONOP) plans in place to support systems that require continuous availability.

2.5. Documentation Specifications

All documentation created to support the IDES Case File Transfer system will comply with existing Project Management Accountability system (PMAS) policies and utilize ProPath templates.

- An electronic user manual and technical training curriculum shall be developed and delivered to all levels of staff users and it is to include a description of the new processes and system interaction.
- Any enhancements to processes that change users from manual to automated processes, integrate multiple systems or other significant changes to user processes, shall have a comprehensive set of documentation for using, managing and configuring the system(s).
- Updates shall be made, as necessary, to the applicable user manuals and Operations and Maintenance (OM) manuals related to the system. If no User or OM documentation exists, it shall be produced.
- Included in the documents should be a list of point of contacts for the system to provide users’ access to Subject Matter Experts (SME) to assist in troubleshooting, knowledge sharing and other resource sharing information.

2.6. Functional Specifications

2.6.1. Capture

[CFT178](#) The system shall provide for a user to create a Service Member File entry – [Appendix G](#).

[CFT178.1](#) The system shall provide for a user to view / update a Service Member File entry.

[CFT179](#) The system shall provide for a user to create a Service Member File case entry.

[CFT180](#) The system shall provide for a user to upload electronic files exemplified by [Appendix D](#), but not limited to this list.

2.6.2. Indexing and Retrieval

[CFT181](#) The system shall provide for a user to retrieve documents by browsing a folder / file structure [Appendix G](#).

[CFT182](#) The system shall provide for a user to retrieve documents based on file attributes (Metadata) [Appendix C](#).

2.6.3. Administrative

[CFT183](#) The system shall provide authorized users the ability to edit the metadata.

[CFT184](#) The system shall provide a new user profile request processing list – refer to [Appendix I](#) – Veteran’s Information Portal Request.

[CFT185](#) The system shall provide the ability to create a new user profile.

[CFT185.1](#) The system shall provide the ability to view / update user profile records.

[CFT186](#) The system shall provide for a user to specify a user’s role or roles.

[CFT187](#) The system shall provide for a user to delete a Service Member Case File.

[CFT188](#) The system shall provide for a user to delete a file in a folder.

[CFT189](#) The system shall provide for a user to submit an email help desk ticket. Refer to the information in the Usability Specification Section.

2.6.4. Help Information

[CFT190](#) The system shall provide for a user to access application help information.

[CFT190.1](#) The system shall provide the ability for the help information to be user maintained and updated.

2.7. Graphical User Interface (GUI) Specifications

The GUI is to be intuitive and easy to use. Easy to use is defined as Windows like with folder views of the records/files/documents.

2.8. Multi-Divisional Specifications

Section 2.10, Scope of Integration specifies the minimum multi-departmental (VA and DoD) requirements for the enabling of the requirements specified in this document.

The request for access to the Transfer Application shall be through the existing Veteran's Information Portal (VIP) Request function as defined in Appendix I – Veteran's Information Portal Request.

2.9. Performance Specifications

- The system shall support at a minimum 1,000 concurrent users.
- The system shall support a minimum of 50,000 SM/Veteran records.
 - The system shall support an average of 500 pages per veteran record
- With a projected enrollment rate of 30,000 SM per year and expected expansion into 139 military installations the system shall be flexible to support the estimated growth (175%) of SM, users, transactions and additional installations.

2.9.1. Scalability

The system must be scalable to the following requirements:

- Support the entire group of organizational users concurrently
- Store all documents for the entire organization
- Store information across multiple servers
- Support multiple databases
- Integrate with other applications.

2.10. Quality Attributes Specifications

The IDES Transfer Application will comply with the quality specifications set forth in the VLER Program current SQA Plan. The following types of testing will be done to ensure the quality of the system:

- Development Testing
- System and Integration Testing
- Go No Go Testing

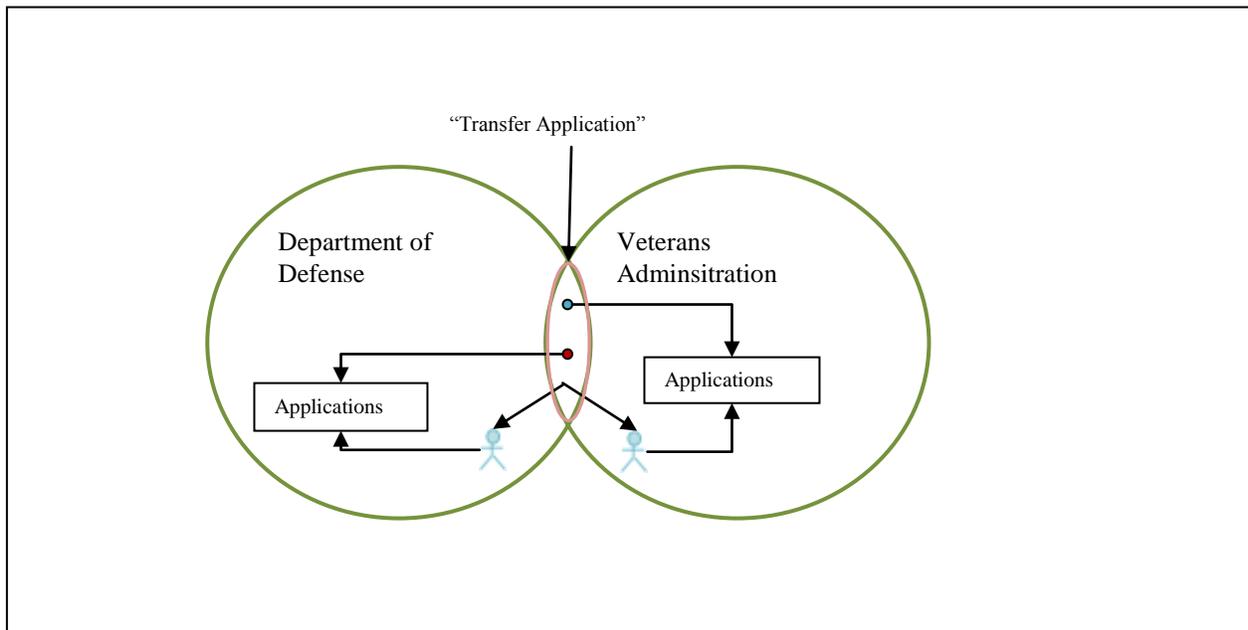
2.11. Reliability Specifications

This specification will be defined by AITC, however the business has outlined the below:

- Availability – System shall be available 24/7 and fully operational 99.9% of the time, with exceptions for routine maintenance activities during non-peak hours.
- System maintenance shall be scheduled during off peak hours.
- A back-up plan will be provided for when the system is brought off-line for maintenance or technical issues/problems.

2.12. Scope of Integration

Figure 3 - Scope of Integration



The diagram represents the needs of both the DoD and the VA to protect their systems through their own individual security standards. The intersection of the circles represents the minimum network sharing and functionality required to share records using the between the two entities using the Transfer Application. The dots that do not touch represent the shared access to the application functionality. The gap between the dots will lessen as integration increases between the DoD and VA. The actors depicted have independent access to the application and to the independent suite of applications.

2.13. Security Specifications

All federally mandated security requirements will be met and they are not limited to this list:

- All VA security requirements will be adhered to. Based on Federal Information Processing Standard (FIPS) 199 and National Institute of Standards and Technology (NIST) SP 800-60, recommended Security Categorization is high.
- The Security Categorization will drive the initial set of minimal security controls required for the information system. Minimum security control requirements are addressed in NIST SP 800-53 and VA Handbook 6500, Appendix D.
- All VA Privacy requirements will be adhered to. Efforts that involve the collection and maintenance of individually identifiable information must be covered by a Privacy Act system of records notice.
- All Enterprise Identity Management requirements will be adhered to. These requirements are applicable to any application that adds, updates, or performs lookups on persons.

2.13.1. Application Security

Users are to be authenticated by for the Transfer Application through the Veteran’s Information Portal which requires user input credentials.

Users are restricted to only use folders and certain capabilities to which they have been given access rights.

Users can be defined by group role and be assigned pre-determined access privileges established for the role(s).

The business will continue to provide analysis of requirements for location based security that will be pursued as a future capability for the Transfer Application.

2.14. System Features

2.14.1. Capture

The system shall provide uploading of any type of electronic document.

The system shall provide user entered metadata.

The system shall provide system created metadata.

2.14.2. Indexing and Retrieval

The system shall provide searching file folders by Case Identification or Social Security Number or Service Member Name.

The system shall provide searching for documents based on the content of the metadata ([Appendix C](#)).

The system shall provide automatic launch of files into their registered application (file extension).

2.14.3. Security

The system shall provide access privileges to be defined by role.

The system shall provide for dynamic changing of roles for controlling access privileges.

The system shall provide an audit trail to track all system activity i.e. logged on users, files viewed, user actions performed and when they were performed as required by federal rules, laws and regulations.

2.14.4. Printing

Printing services will be provided by the owning application when an application record is opened.

2.15. Usability Specifications

Files are organized by a folder / file structure that is easily understood and easy to use.

Convenient document navigation with a Windows-like tree structure and an easy-to-use search engine is provided.

Training will be provided to the responsibility areas using a minimum of a user guide and user maintained help information that is accessible through the application. The training will target how each responsibility is to use the application in support of their work and communication to other roles and areas.

The customer has requested the ability to submit an online help desk ticket. Where this ticket would go could not be determined at the time of the requirements approval process.

* Indicates Required Field

Ticket Number: _____

* Caller Name:

* Module:

* Call Type:

* Preferred Contact Method:

Phone:

Email:

* Reported Issue:

Characters Remaining: 4000/4000

3. Applicable Standards

The implementation for Case File Transfer using records management methodologies must adhere to all enterprise and applicable Federal Standards.

4. Interfaces

There are no specifications for this section for these requirements.

4.1. Communications Interfaces

Please refer to technical architecture descriptions as developed and maintained by the AITC.

There are no specifications for this section for these requirements.

4.2. Hardware Interfaces

Please refer to technical architecture descriptions as developed and maintained by the AITC.

4.3. Software Interfaces

There are no specifications for this section for these requirements.

4.4. User Interfaces

There are no specifications for this section for these requirements.

5. Legal, Copyright, and Other Notices

Not Applicable

6. Purchased Components

This section will be updated as more is learned about potential solutions for the requirements.

7. User Class Characteristics

Name	Description	Responsibilities
Primary Users	PEBLO, MSC, VHA MEF, PEB, DRAS, VBA	Provide disability claims review/tracking, decision-making on level of fitness, and assign disability.
Secondary Users	Wounded Warrior Care and Transition Policy (WWCTP)	Provide oversight of programs for wounded, ill, and injured SMs.

8. Estimation

There is no function point baseline for the Transfer Application.

Function Point Analysis Results Table

Appendix A. Acronyms and Definitions

Acronyms

<http://vaww1.va.gov/acronyms/>

Term	Definition
ASCH	American Standard Code for Information Interchange
AFB	Air Force Base
AHLTA	Armed Forces Health Longitudinal Technology Application
AITC	Austin Information Technology Center
ARMS	Air Force Record Management System
ASD	Architecture, Strategy and Design
BIRLS	Beneficiary Identification Records Locator Service
BN	Business Need
BRD	Business Requirements Document
CAPRI	Compensation and Pension Records Interchange
CCOW	Clinical Context Object Workgroup
CHCS	Composite Health Care System
CONOPS	Concept Of Operations
CORP-DB	Corporate Database
COVERS	Control of Veterans Records
CP	Compensation and Pension
CPRS	Computerized Patient Record System
DEERS	Defense Enrollment Eligibility Reporting System
DES	Disability Evaluation System
DoD	Department of Defense
DPRIS	Defense Personnel Records Image Retrieval System
DRAS	Disability Rating Activity Sites
eMEB	Electronic Medical Evaluation Board
EPMO	Enterprise Project Management Office
ERR	Enterprise Requirements Repository
ESM	Enterprise Systems Management
FCMT	Federal Case Management Tool
FIPS	Federal Information Processing Standard

FPEB	Formal Physical Evaluation Board
HDS	Health Data Systems
IAM	Identity & Access Management
ICA	International Council on Archives
IDES	Integrated Disability Evaluation System
IDM	Identity Management
IFD	Initial Fitness Decision
IOC	Initial Operating Capability
IPEB	Informal Physical Evaluation Board
IPERMS	Interactive Personnel Management System
ISI	Information Sharing Initiative
IT	Information Technology
ISO	International Organization for Standardization (ISO) 15489
JSP	Joint Strategic Plan
MAP-D	Modern Award Processing Development
MB	Mega Byte
MEB	Medical Evaluation Board
MEBITT	Medical Evaluation Board Internal Tracking Tool
MEF	Medical Evaluation Facility
MSC	Military Service Coordinator
MTF	Military Treatment Facility
NDAA	National Defense Authorization Act
NIST	National Institute of Standards and Technology
NSR	New Service Request
O&M	Operations & Management
OCR	Optical Character Recognition
OD & MA	Office of Disability and Medical Assessment
ODA	Office of Disability Assistance
OEF	Operation Enduring Freedom
OFO	Office of Field Operations
OGC	Office of General Counsel
OIF	Operation Iraqi Freedom
OIT	Office of Information and Technology
OM	Operations Manual
OPP	Office of Policy and Planning

OWNR	Owner Requirement
PCGL	Personal Computer Generated Letters
PEB	Physical Evaluation Board
PEBLO	Physical Evaluation Board Liaison Officer
PII	Personally Identifying Information
PMAS	Project Management Accountability System
POC	Proof of Concept
QM	Quality Management
RAEM	Requirements Analysis & Engineering Management
RBA2000	Rating Board Application 2000
REE	Registration, Eligibility & Enrollment
rIDES	Remodeled Integrated Disability Evaluation System
RO	Regional Office
RSD	Requirements Specification Document
SI	Severely Injured/Seriously Ill
SM	Service Member
SME	Subject Matter Expert
SMRTS	Service Medical Records Tracking System
SQA	Software Quality Assurance
TIFF	Tagged Image File Format
TMDS	Theater Medical Data Store
TSGLI	Traumatic Servicemembers Group Life Insurance
USB	Undersecretary for Benefits
USH	Undersecretary for Health
VA	Veterans Affairs
VADIR	VA/DoD Identity Repository
VADS	Veterans Assistance Discharge System
VAMC	Veterans Affairs Medical Center
VBA	Veterans Benefits Administration
VDL	VistA Documentation Library
VERIS	Veterans Exam Request Information System
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VLER	Virtual Lifetime Electronic Record
VRM	Veterans Relationship Management

VSSC	VA Support Services Center
VTA	Veterans Tracking Application
WRAMC	Walter Reed Army Medical Center
WWCTP	Wounded Warrior Care and Transition Policy

Terms and Definitions

Service Member File Entry	This refers to the top level folder in the tree structure as defined in Appendix G
Service Member Case File Entry	This refers to the case level folder in the tree structure as defined in Appendix G. There can be multiple entries at this level. It represents each occurrence of a service member being referred into the IDES process.
File or Document	The word file can have several meanings in the context of the document: <ol style="list-style-type: none"> 1. In the context of Service Member File it means the highest level of the tree structure in Appendix G. 2. In the context of Service Member Case File it means the tree structure below the top level that repeats for each occurrence of IDES – Appendix G. 3. In the context of the contents of a folder it means a file such as file.pdf, file.doc and can also be referred to as a document.

Appendix B. References

- Transition Testimony for SM to Veteran
<http://democrats.oversight.house.gov/images/stories/SUBCOS/504%20nshdfo%20transition/Medve%20Testimony%20Complete.pdf>
- rIDES BRD
<http://vaww.oed.portal.va.gov/products/vler/warriorsupport/VTA/PMAS/Business%20Requirements%20rIDES/IDES%20IT%20System%20BRD.docx>
- **VTA As-Is Product Architecture:**
<http://vaww.oed.portal.va.gov/products/vler/warriorsupport/VTA/PMAS/PMAS%20Increment%202/VTA%20As-Is%20Product%20Architecture%20v1.0.docx>
- **VTA As-Is Software Design Document:**
[http://vaww.oed.portal.va.gov/products/vler/warriorsupport/VTA/PMAS/PMAS%20Increment%202/VTA%20As-Is%20Software%20Design%20Document%20\(SDD\)%20v1.0.docx](http://vaww.oed.portal.va.gov/products/vler/warriorsupport/VTA/PMAS/PMAS%20Increment%202/VTA%20As-Is%20Software%20Design%20Document%20(SDD)%20v1.0.docx)
- **VHA privacy compliance:**
<http://vaww.tampa.med.va.gov/resources/hipaa/documents/Privacy%20Handbook.pdf>
- **Warrior Support**
<http://vaww.oed.portal.va.gov/products/vler/warriorsupport/default.aspx>
- rIDES Proof of Concept VTA Requirements
- http://vaww.oed.portal.va.gov/products/vler/warriorsupport/VTA/PMAS/PMAS%20Increment%202/SUPL_POC_rIDES_Reports.doc
- **The Federal Records Act (44 USC 3301).**
Source: <http://www.archives.gov/records-mgmt/faqs/federal.html#record>
- **International Organization for Standardization (ISO) 15489**
Source(s): <http://www.dcc.ac.uk/resources/briefing-papers/standards-watch-papers/iso-15489>
- **DoD 5015.2**
Source: <http://www.dtic.mil/whs/directives/corres/pdf/501502std.pdf>
- **The Dublin Core Metadata Initiative**
Sources: <http://dublincore.org/>

9. Appendix C – User Defined Metadata

Attribute	Description
Service Member Name	Identifies content of the folder
Social Security Number	Attribute of Service Member
Date of Birth	Attribute of Service Member
Pay Grade	Attribute of Service Member
Gender	Attribute of Service Member
Branch of Service	Attribute of Service Member
Component	Attribute of Service Member

[Appendix G](#) defines the top level folder structure where these attributes are to be applied.

10. Appendix D – Folder Content

Document	Number of Pages on Average
VA Form 21-0819	2-4
Complete Service Treatment Record (STR)	Range 150-500
Periods of creditable service (RC only)	2
LOD determination (RC only)	2
LOD investigation (if applicable)	2
Entrance Exam	14
Orders	6
Benefits Letter	7
Rating Reconsideration Request	40
DRAS Rating	24

Complete STR

DD Form 689 Individual Sick Slip
DD Form 741 Eye Consultation
DD Form 771 Eyewear Prescription
DD Form 792 Twenty-Four Hour Patient Intake and Output Worksheet
DD Form 877 Request for Medical/Dental Records or Information
DD Form 1141 Record of Occupational Exposure to Ionizing Radiation
DD Form 1289 Prescription Form
DD Form 1380 U.S. Field Medical Card
DD Form 2005 Privacy Act Statement – Health Care Records
DD Form 2064 Certificate of Death Overseas

DD Form 2214 Noise Survey
DD Form 2214C Noise Survey (Continuation Sheet)
DD Form 2215 Reference Audiogram
DD Form 2216 Hearing Conservation Data
DD Form 2239 Consent for Medical Care and Transportation in the Aeromedical Evacuation System
DD Form 2341 Report of Animal Bite – Potential Rabies Exposure
DD Form 2482 Venom Extract Prescription
DD Form 2489 Farnsworth Lantern and Red/Green Color Vision Tests
DD Form 2492 DoD Medical Examination Review Board Report of Medical History
DD Form 2493-1 Asbestos Exposure, Part 1
DD Form 2493-2 Asbestos Exposure, Part 2
DD Form 2541 Diagnostic Evaluation Program for the Handicapped
DD Form 2569 Third Party Collection Program – Record of Other Health Insurance (needed for DoD business only)
DD Form 2813 DoD Active Duty/Reserve Forces Dental Examination
DD Form 2161 Referral for Civilian Medical Care
DD Form 2697/SF 78 Report of Medical Assessment (Separation Physical Examination)
DD Form 2766 Adult Preventive and Chronic Care Flowsheet
DD Form 2766C Adult Preventive and Chronic Care Flowsheet – Continuation Sheet
DD Form 2770 Abbreviated Medical Record (a copy as a narrative summary of hospital short stay and same day surgery filed)
DD Form 2872-1 Test Health Survey
DD Form 2795 Pre-Deployment Health Assessment Questionnaire
DD Form 2796 Post-Deployment Health Assessment
DD Form 2807-1 Report of Medical History

DD Form 2807-2 Medical Prescreen of Report of Medical History
DD Form 2808 Medical Record – Report of Medical Examination
DD Form 2871 Request for Restriction of Information
DD Form 2870 Authorization for Disclosure of Medical and Dental Information
DD Form 2900 Post-Deployment Health Reassessment
SF 502 Medical Record – Narrative Summary
SF 503 Medical Record – Autopsy Protocol
SF 509 Medical Record Progress Notes/(when used as a discharge summary); ‘copy’ included
SF 513 Medical Record Consultation Sheet Electronic Laboratory Reports (Clinical Record)
SF 515 Medical Record – Tissue Examination
SF 516 Clinical Record – Operation Report
SF 525 Medical Record – Radiation Therapy Summary
SF 528 Medical Record – Muscle Function by Nerve Distribution: Face, Neck
SF 529 Medical Record – Muscle Function by Nerve Distribution: Trunk and Lower Extremity
SF 530 Medical Record – Neurological Examination
SF 543 Contributor’s List of Pathologic Material OF 517 Clinical Record – Anesthesia
SF 519B Radiologic Consultation Request/Report (Radiology/Nuclear Medicine/Ultrasound/Computed Tomography Examinations)
SF 522/OF 522 Medical Record – Request for Administration of Anesthesia and Performance of Operations and Other
SF 523 Medical Record – Authorization for Autopsy
SF 527 Medical Record – Group Muscle Strength, Joint R.O.M. Girth and Length Measurements
SF 531 Medical Record – Anatomical Figure
SF 533 Medical Record – Prenatal and Pregnancy
SF 541 Medical Record – Gynecologic Cytology

SF 550 Medical Record – Urinalysis
SF 551 Medical Record – Serology
SF 557 Medical Record – Miscellaneous
SF 558 Medical Record – Emergency Care and Treatment (Rev 9-96)
SF 559 Medical Record – Allergen Extract Prescription New and Refill
SF 600 Medical Record – Chronological Record of Medical Care
SF 601/PHS-731 (CG) Immunization Record
SF 602 Medical Record – Serology Record
OF 275 Medical Record Report
OF 520 Electric Cardiographic Record
OF 523B Medical Record – Authorization for Tissue Donation Other Medical documentation from civilian care as deemed necessary
DD 200 Financial Liability Investigation of Property Loss Not Applicable Dental Panographs
DD Form 689 Individual Sick Slip
DD Form 2005 Privacy Act Statement – Health Care Records
DD Form 2322 Dental Laboratory Work Authorization
DD Form 2813 Department of Defense Active Duty/Reserve Forces Dental Examination
SF 509 Medical Record – Progress Report (Discharge only)
SF 513 Medical Record – Consultation Sheet
SF 515 Medical Record – Tissue Examination
OF 517 Medical Record – Anesthesia
SF 522/OF 522 Request for Administration of Anesthesia and for Performance of Operations and other procedures
SF 603 Medical Record – Dental SF 603A Medical Record – Dental Continuation Other Dental documentation from civilian care as
DD Form 2368 DoD Medical Examination Review Board Service Academy/ROTC Med Qualification

DD Form 2369 DoD Medical Examination Review Board Cytoplegic Refraction
DD Form 2370 DoD Medical Examination Review Board Three Day Blood Pressure and Pulse Check
DD Form 2371 DoD Medical Examination Review Board Update of Applicant's Medical Examination
DD Form 2372 DoD Medical Examination Review Board Statement of Present Health
DD Form 2373 Notification of Failure to Appear for Service Academy/ROTC Medical Examination (PAS)
DD Form 2374 DoD Medical Examination Review Board Heart Murmur Evaluation
DD Form 2375 DoD Medical Examination Review Board Pulmonary Function Studies
DD Form 2376 DoD Medical Examination Review Board Supplemental Statement of Medical History
DD Form 2377 (replaced by 2489) DoD Medical Examination Review Board Red/Green Color Vision Test
DD Form 2378 DoD Medical Examination Review Board Statement of History Regarding Headaches
DD Form 2379 DoD Medical Examination Review Board Statement of History Regarding Head Injury
DD Form 2380 DoD Medical Examination Review Board Statement of History Regarding Sleepwalking
DD Form 2381 DoD Medical Examination Review Board Statement of History Regarding Motion Sickness
DD Form 2382 DoD Medical Examination Review Board Statement of History Regarding Allergies
DD Form 2383 DoD Medical Examination Review Board Statement of Use Regarding Medication
DD Form 2404 DoD Child and Spouse Abuse Report
DD Form 2480 DoD Medical Examination Review Board Report of Dental Examination (PAS)
DD Form 2486 Child/Spouse Abuse Incident Report
SF 88 Report of Medical Examination
SF 89 Report of Medical History
SF 93 Report of Medical History
SF 514 Laboratory Reports (Clinical Record)
SF 519 Medical Record – Radiographic Reports

SF 519A Radiographic Report
SF 524 Medical Record – Radiation Therapy
SF 545 Laboratory Report Display
SF 546 Chemistry I
SF 547 Chemistry II
SF 548 Chemistry III (Urine)
SF 549 Hematology
SF 552 Parasitology
SF 553 Microbiology I
SF 554 Microbiology II
SF 555 Spinal Fluid
SF 560 Medical Record – Electroencephalogram Request and History In addition to the DD and SF, the Service-specific forms in Table 4 are used by each Service and retained in the STR. *Some of these forms may no longer be used, but may be retained in older
Army (DA) Form 3349 Physical Profile
DA Form 3365 Authorization for Medical Warning Tag
DA Form 3443 Terminal Digit-X-Ray Film Preserver
DA Form 3443-X Terminal Digit-X-Ray Film Negative Preserver (Loan)
DA Form 3443-Y Terminal Digit-X-Ray Film Negative Preserver (Insert) Repl DA Forms
DA Form 3443-Z Terminal Digit-X-Ray Film Negative Preserver (Report Insert)
DA Form 3647 Inpatient Treatment Record Cover Sheet
DA Form 3705 Receipt for Dental Records
DA Form 3824 Urologic Examination
DA Form 3888 Medical Record – Nursing History and Assessment
DA Form 3888-2 Medical Record – Nursing Care Plan

DA Form 3888-3 Medical Record – Nursing Discharge Summary
DA Form 4006 Field Medical Record Jacket
DA Form 4028 Prescribed Medication
DA Form 4108 Register of Operations
DA Form 4221 Diabetic Record
DA Form 4256 Doctors Orders
DA Form 4254 Request for Private Medical Information
DA Form 4359-R Authorization for Psychiatric Service Treatment
DA Form 4678 Therapeutic Documentation Care Plan (Medications)
DA Form 4700 Medical Record-Supplemental Medical Data
DA Form 4876 Request and Release of Medical Information to Communications Media
DA Form 5007A Medical Record – Allergy Immunotherapy Record
DA Form 5007B Medical Record – Allergy Immunotherapy Record
DA Form 5008 Telephone Medical Advice/Consultation Record
DA Form 5009 Release Against Medical Advice
DA Form 5181 Screening Note of Acute Medical Care
DA Form 5569 Isoniazid (INH) Clinic Flow Sheet
DA Form 5570 Health Questionnaire for Dental Treatment
DA Form 7095 ASAP Outpatient Discharge Summary
DA Form 7096 ASAP Outpatient Aftercard Plan
DA Form 7097 ASAP Outpatient Problem List and Treatment Plan Review
Army DA Form 7098 ASAP Outpatient Treatment Plan and Review
DA Form 7099 ASAP Outpatient Biopsychosocial Evaluation
DA Form 7389 Medical Record-Anesthesia

DA Form 8000 ASAP Triage Instrument (For Unscheduled Patients)
DA Form 8001 Limits of Confidentiality
DA Form 8002 ASAP Outpatient Administrative Summary
DA Form 8003 Army Substance Abuse Program (ASAP) Enrollment
DA Form 8004 Army Substance Abuse Program (ASAP) Outpatient
Medical Records-Privacy Act Information Feb 2003
AR 40-66
DA Form 8005 Outpatient Medical Record, Series 0-9
DA Label 162 Emergency Medical Identification Symbol
(NAVMED) 6150/4 Abstract of Service and Medical History
(OPNAV) 5211/9 Accounting Form
NAVMED 1300/1 Medical, Dental, and Educational Suitability Screening for Service and Family Members
NAVMED 1300/2 Medical, Dental, and Educational Suitability Screening Checklist & Worksheet
NAVMED 1300/3 Medical Assignment Screening
NAVMED 6000/2 Chronological Record of HIV Testing
NAVMED 6000/3 Roster for HIV Antibody Testing
NAVMED 6000/5 Medical Record – Supplemental Medical Data
NAVMED 6100/5 Abbreviated Medical Evaluation Board Report
NAVMED 6100/6 Return of a Patient to Medically Unrestricted Duty From Limited Duty
Bureau of Medicine and Surgery (BUMED) 6110/1 Physical Qualification Status Letter
BUMED 6110/2 Action Letter on Physical Examinations
BUMED 6110/3 Medical Review Action Sheet
NAVMED 6120/1 Competence for Duty Examination
NAVMED 6120/2 Officer Physical Examination Questionnaire

NAVMED 6120/3 Annual Certificate of Physical Condition
Navy NAVMED 6150/1** Record of Physical Qualification, Special Training & Periodic Exams for Performance of Special Duty
NAVMED 6150/2 Special Duty Medical Abstract
NAVMED 6150/4 Abstract of Service & Medical History
NAVMED 6150/41 Authorization for Disclosure of Medical or Dental Information
NAVMED 6200/1 Blood Lead Level Reporting Form
NAVMED 6230/4 Adult Immunizations Record
NAVMED 6260/5 Periodic Health Evaluation, Navy Asbestos Medical Surveillance Program History and Physical Exam
NAVMED 6260/6 Report of Audiologic Evaluation
NAVMED 6260/7 Periodic Health Evaluation, Navy Asbestos Medical Surveillance Program Roentgenographic Interpretation for Pneumoconiosis
NAVMED 6300/5 Inpatient Admission/Disposition Record
NAVMED 6310/2 Navy-Marine Corps CTR – Theater Medical Registry Form
NAVMED 6310/3 Physician Trauma Admitting Record (Theater Hospital Care)
NAVMED 6310/4 Joint Theater Trauma Nursing Record
NAVMED 6410/4 Altitude Chamber Reaction Report
NAVMED 6410/10 Abbreviated Aeromedical Examination
NAVMED 6470/1 Exposure to Ionizing Radiation
NAVMED 6470/3 Radiation Exposure Report
NAVMED 6470/10 Record of Occupational Exposure to Ionizing Radiation
NAVMED 6470/11 Record of Exposure to Ionizing Radiation from Internally Deposited Radionuclides
NAVMED 6470/13 Medical Record – Ionizing Radiation Medical Medical Record – Ionizing Radiation Medical Examination
NAVMED 6490/1*** Visual Record

NAVMED 6500/1 Report of Heat/Cold Injury
NAVMED 6520/8** Antarctic Assignment Questionnaire
NAVMED 6520/9** Psychiatric Evaluation – Operation Deep Freeze Psychiatric Evaluation – Operation Deep Freeze
NAVMED6520/10** Psychological Evaluation – Operation Deep Freeze
Navy NAVMED 6550/12 Patient Profile
NAVMED 6550/13 Patient Care Plan
NAVMED 6550/14 Patient Data Base
NAVMED 6570/1 Pharmacy Change Request
NAVMED 6100/1 Medical Board Report Cover Sheet
NAVMED 6100/2 Medical Board Statement of Patient
NAVMED 6100/3*** Medical Board Certificate Relative to a PEB Hearing
NAVMED 6100/4 Medical Board Certificate Relative to Counseling on Refusal of Surgery and/or Treatment
NAVMED 6100/5 Abbreviated Temporary Limited Duty (TLD) Medical Board Report
NAVMED 6100/6 Return of a Patient to Medically Unrestricted Duty From Limited Duty
NAVMED O/P 6224/1 Initial Evaluation for Positive TB Skin Test (TST)
NAVMED O/P 6224/2 Periodic Evaluation for Patients Receiving Treatment for Latent TB Infection (LTBI)
NAVMED O/P 6224/3 Annual Evaluation for Patients With a History of a Positive TB Skin Test
NAVMED O/P 6230/2 Medical Record – Influenza Vaccine Administration Record of Visit
NAVMED O/P 6410/11 Pretesting Consent Form for Performance Maintenance Stimulant
NAVMED O/P 6230/1 Hepatitis C Virus (HCV) Antibody Screening at Separation or Retirement Physical Examination
NAVMED O/P 6470/12 Report of Medical Examination – Ionizing Radiation
OF 522 Medical Record- request for Administration of Anesthesia and For performance of Operations
OPNAV 5100/14 Exposure Monitoring Plan (NAVPERS) 1000/1 Pseudofolliculitis Barbae (PFB) Shaving

Waiver/Evaluation/Disposition
(NAVPERS) 1000/1 Pseudofolliculitis Barbae (PFB) Shaving Waiver/Evaluation/Disposition
NAVMED 6150/4 Abstract of Service and Medical History
NAVMED 6000/2 Chronological Record of HIV Testing
NAVMED 6230/4 Adult Immunizations Record
Form 356 Findings and Recommended Disposition of USAF Physical Evaluation Board
AF Form 1042 Medical Recommendation for Flying or Special Operation Duty
AF Form 1180 Action on Physical Evaluation Board Findings and Recommended disposition
AF Form 1352 Hyperbaric Patient Information and Therapy Record
AF Form 1418 Recommendation for Flying or Special Operation Duty – Dental
AF Form 1446 Medical Examination – Flying Personnel
AF Form 1480* Summary of Care
AF Form 1480A* Adult Preventive and Chronic Care Flowsheet
AF Form 1480B* Adult Preventive and Chronic Care Flowsheet – Continuation sheet
AF Form 1527;1-2 History of Occupational Exposure to Ionizing Radiation
AF Form 1535 Physical Therapy Consult
AF Form 1671 Detailed Hearing Conservation Data Followup
AF Form 1721 Spectacle Prescription
AF Form 190 Occupational Illness/Injury Report
AF Form 2755* Master Workplace Exposure Data Summary
AF Form 2769* Supplemental Data Sheet
AF Form 348 Line of Duty Determination
AF Form 3922 Adult Preventive Care – Flowsheet
AF Form 422 Physical Profile Serial Report
AF Form 560 Authorization and Treatment Statement

AF Form 565 Record of Inpatient Treatment
AF Form 618 Medical Board Report
AF Form 745 Sensitive Duties Program Record Identifier
AF Form 895 Annual Medical Certificate (AMC)
AF Form 966 Registry Record
HEAR-PCM Health Enrollment Assessment Review for Primary Care Managers (include results from HEAR)
Optional Form (OF) 517 Medical Record – Anesthesia
Air Force OF 522 Medical Record – Request for Administration of Anesthesia and for Performance of Operations and Other Procedures
OF 558 Medical Record-Emergency Care and Treatment
OF 520 Medical Record – Electrocardiographic Record
SOF TCCC Form 1 Tactical Combat Casualty Care Card
Coast Guard (CG)- 5447 History and Report of Occupation Medical Surveillance and Evaluation Program (OMSEP)
CG-5214 Emergency Medical Treatment Report (MEDEVAC Report)
CG-3443* Health Record Cover
CG-6020 Medical Recommendation For Flying Duty
CG-5447A History and Report of OMSEP Examination
CG-5684 Medical Board Report Cover Sheet
CG-4057 Chronological Record of Service
Army DA Form 5570 Health Questionnaire for Dental Treatment
DA Form 4410-R Disclosure Accounting Record (on record jacket)
DA Form 3444 Treatment Record Jacket, Series 0-9
DD Form 2813 Department of Defense Active Duty/Reserve Forces Dental Examination
DA Form 3444- Series (1-9) Medical and Dental Records

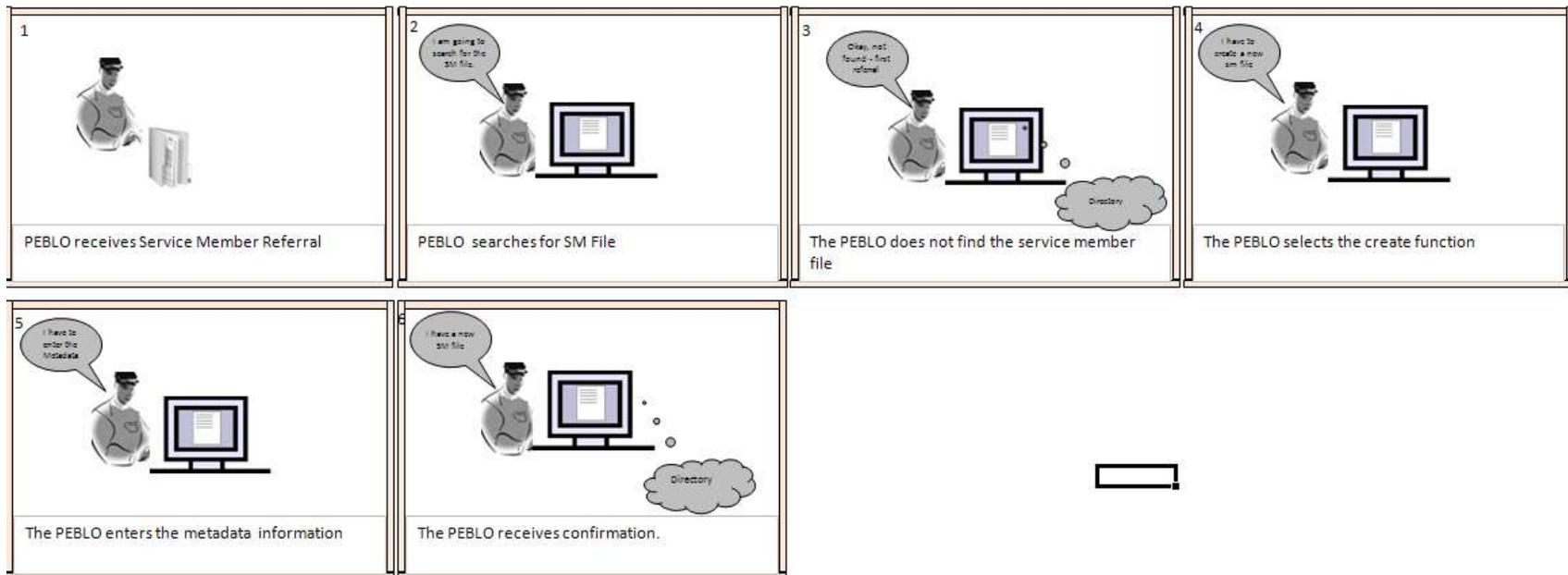
NAVMED 6600/12 Reserve Dental Assessment and Certification
Unmounted Radiographs Un-mounted radiographs in envelopes
Radiograph mounts Sequential bitewing radiograph mounts
Mouth Radiographs
NAVMED 6600/3
OPNAV 5510/415 Record Identifier for Personnel Reliability Program
OPNAV 5211/9 Record of Disclosure (imprinted inside the folder)
NAVMED 6600/13 Oral Exam
NAVMED 6600/14 Dental Treatment
NAVMED 6600/15 Current Status
NAVMED 6600/16 Oral Problem List
NAVMED 6630/5 Orthodontic Index and Evaluation of Occlusion
NAVMED 6630/6 Orthodontic Transfer Form Patient in Active Treatment
NAVMED 6630/7 Special Consent to Performance of Orthodontic Treatment
NAVMED 6660/1 Plaque Control Record
NAVMED 6660/2 Periodontal Chart
NAVMED 6660/15 Current Status Card
NAVMED 6150/21-30 Forensic Examination Chart
AF Form 745 Sensitive Duties Program Record Identifier
AF Form 966 Registry Record
AF Form 696 Dental Patient Medical History Treatment Plan Active Treatment Plan Radiographs Envelope for Radiographs. Place serial bitewing cards and flat panoramic radiographs on top of envelope.
AF Form 422 Physical Profile Serial Report
AF Form 490 Medical Dental/Appointment

AF Form 1418 Recommendation for Flying or Special Operations Duty – Dental
AF Form 570 Notification of Patient’s Medical Status
AF Form 1417 Sedation Clinical Record – Anesthesia
AF Form 644 Record of Dental Attendance
AF Form 1801 Post Mortem Dental Record
AF Form 644B Dental Officer of the Day (DoD) / Dental Charge of Quarters (DCQ)
AF Form 935 Periodontal Diagnosis and Treatment Plan
AF Form 935A Periodontal Maintenance Record
AF Form 935B Plaque Index/Bleeding Point Record
AF Form 940 Endodontic Treatment Record
AF Form 1802 Ante mortem Dental Record
AF Form 1803 Dental Identification Summary Report
AF Form 85 Inventory Adjustment Voucher
AF Form 520 Record of Dental Precious Metal and Alloys
CG-3443-2 U.S. Coast Guard Dental Record Cover
CG-5605 Dental Health Questionnaire
CG-6019 Dental Procedure Form

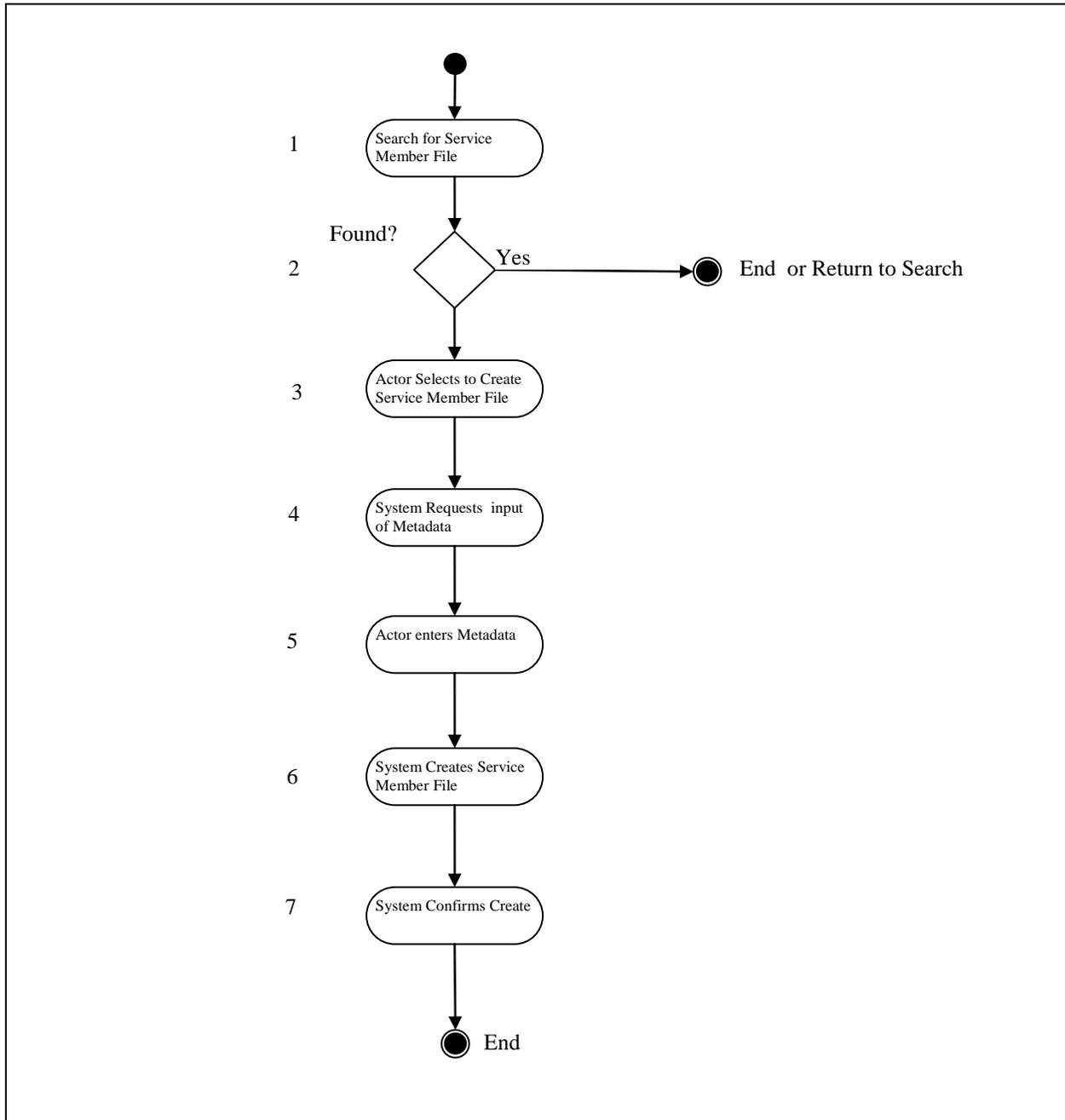
11. Appendix E – Storyboards

11.1. Create Service Member File

Create Service Member File



Create Service Member File Process Flow



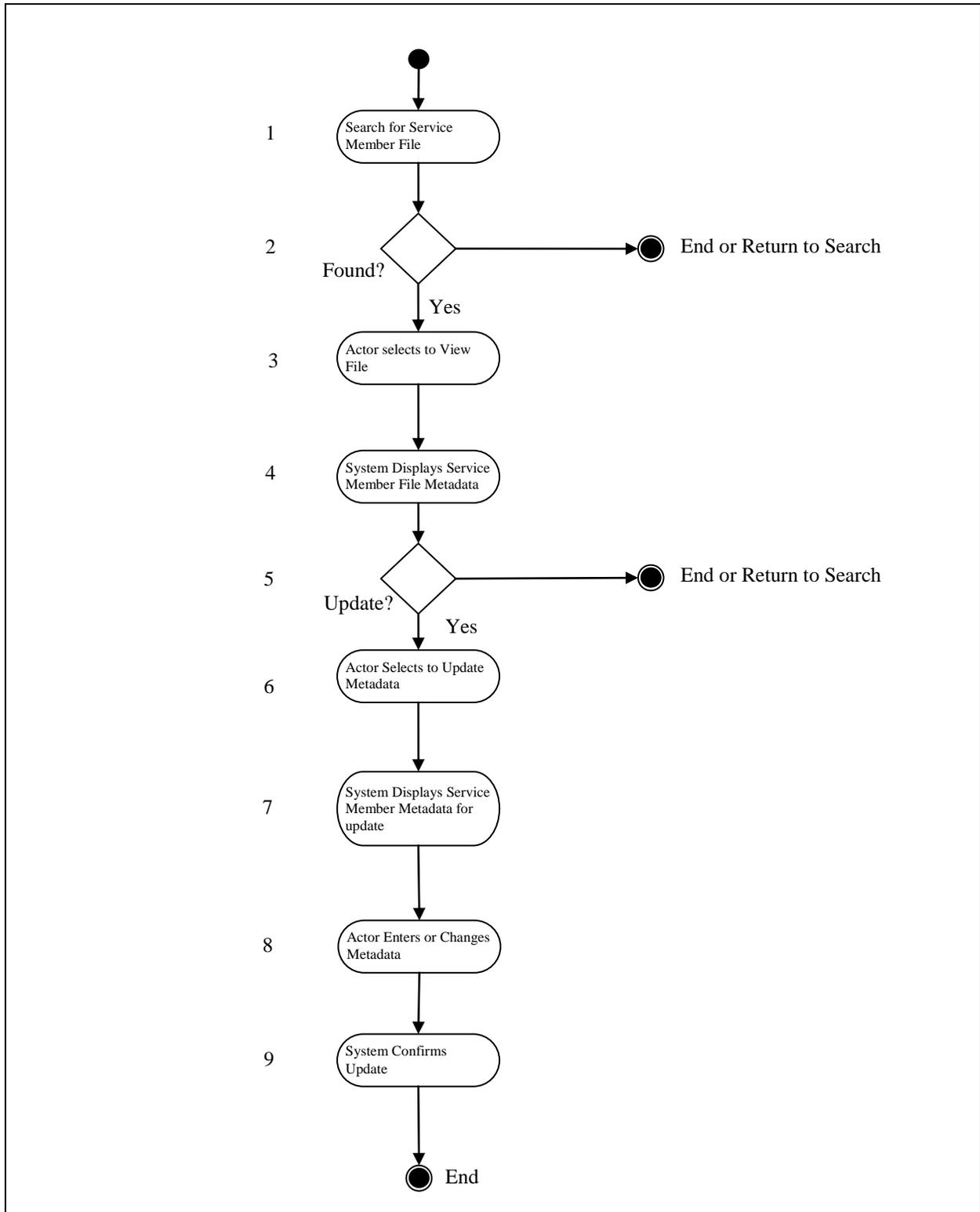
Create Service Member File Business Rules

1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, if the Service Member File is found the actor may choose to end the process or to continue with the create function.
3. In step 3, Actor Selects to Create Service Member File, the system checks to see if the actor has permission to create a case file according to Appendix H – Folder Access Permissions by Role. The system rejects the request if the actor is not authorized.
4. In step 4, Actor Enters Metadata, the following metadata items are entered as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Service Member Social Security Number
 - c. Service Member Date of Birth
 - d. Service Member Pay Grade
 - e. Service Member Gender
 - f. Service Member Branch of Service
 - g. Service Member Component
 - h. The system generates the following metadata by default, but is not limited to this list:
 - i. Creation Date and Time
 - ii. Created by Login Id.
5. In step 5, Actor Enters Metadata, the actor enters the metadata as defined by [Appendix C](#).
6. In step 6, System Creates Service Member File, the system creates the Service Member File top level folder as defined in [Appendix G](#).
7. In step 7, the system confirms a successful file creation.

In any step, prior to committing to the create, the actor may cancel the function.

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View / Update Service Member File Process Flow



View / Update Service Member File Business Rules

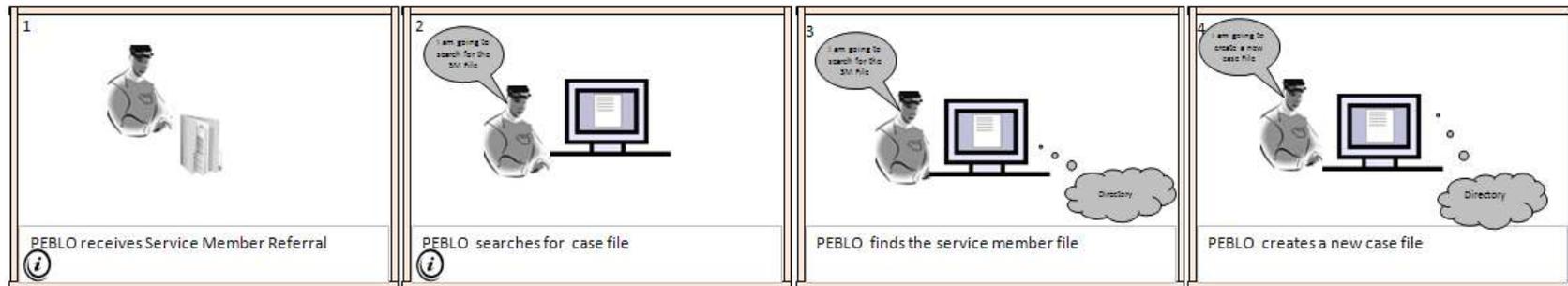
1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – [Appendix F](#)
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, if the Service Member File is not found the system ends the process or returns to search.
3. In step 3, Actor Selects to View File, the actor selects to view the file.
4. In step 4, System Displays Service Member File Metadata, the system displays the Service Member File Metadata as defined in [Appendix C](#).
5. In step 5, Update?, the actor can select to update or cancel out of the function.
6. In step 6, Actor Selects to Update Metadata, the actor selects to update the metadata.
7. In step7, System Displays Service Member Metadata for Update, the actor inputs new or changed metadata.
8. In step 8, Actor Enters or Changes Metadata, the following metadata items are entered as defined by the Application Data Dictionary – [Appendix G](#)
 - a. Service Member Name
 - b. Service Member Social Security Number
 - c. Service Member Date of Birth
 - d. Service Member Pay Grade
 - e. Service Member Gender
 - f. Service Member Service Branch
 - g. Service Member Component
 - h. The system generates the following metadata by default, but is not limited to this list
 - i. Creation Date and Time
 - ii. Created by Login Id.
9. In step 9, the system confirms a successful file update.

In any step, prior to committing to the update, the actor may cancel the function.

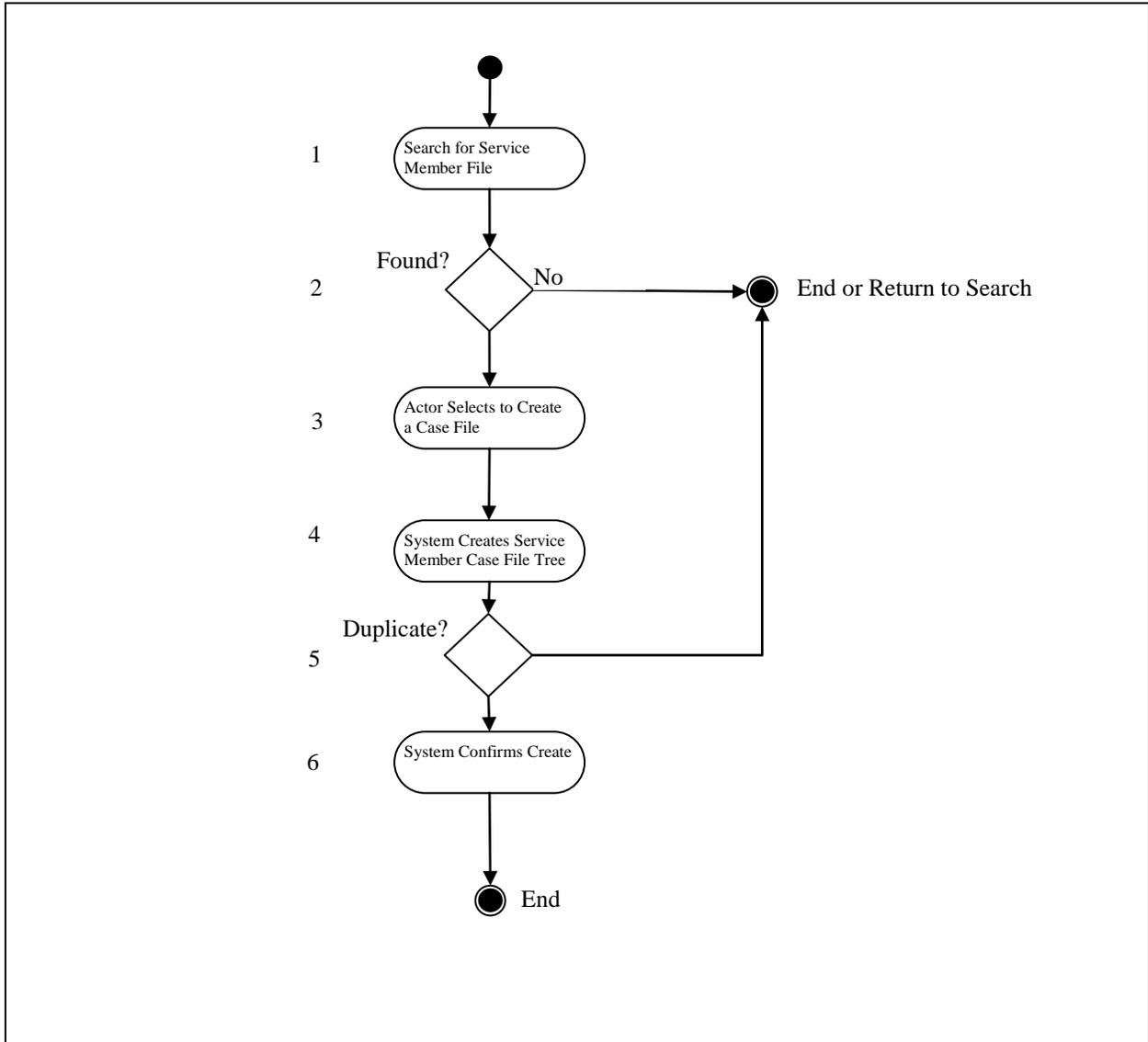
[Return to functional specifications](#)

11.2.Create Service Member Case

Create Service Member Case File



Create Service Member Case Process Flow



Create Service Member Case File Business Rules

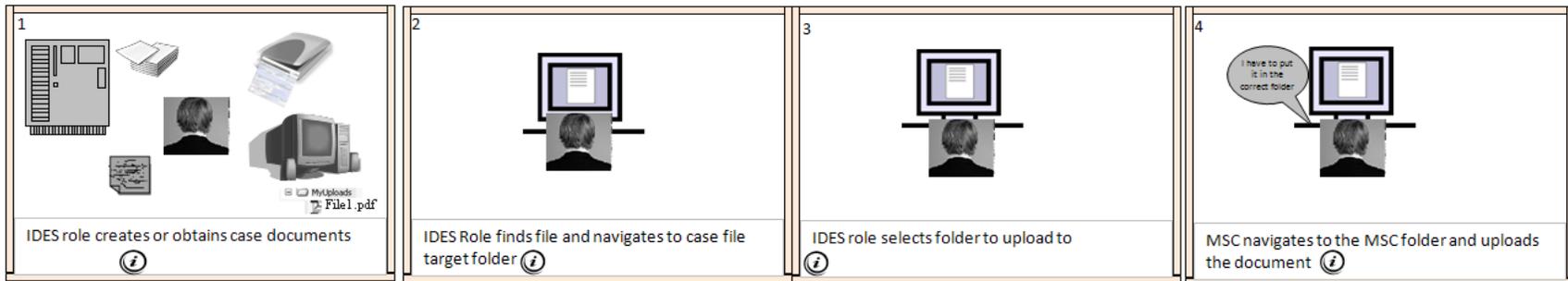
1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, if the Service Member File is not found the system ends the process or returns to search.
3. In step 3, Actor Selects to Create a Case File, if the Service Member Case Identification was entered as part of the search it is carried forward into the step automatically by the system. If Service Member Case Identification was not entered then the system prompts for the Service Member Case Identification.
4. In step 4, the system creates the Service Member Identification File according to [Appendix G](#).
5. In step 5, Duplicate?, the system rejects an attempt to create a duplicate Service Member Case Identification and the process ends or returns to search.
6. In step 6, System Confirms Create, the system confirms the creation of the Service Member Case File.

In any step, prior to committing to the creation of the case file, the actor may cancel the function.

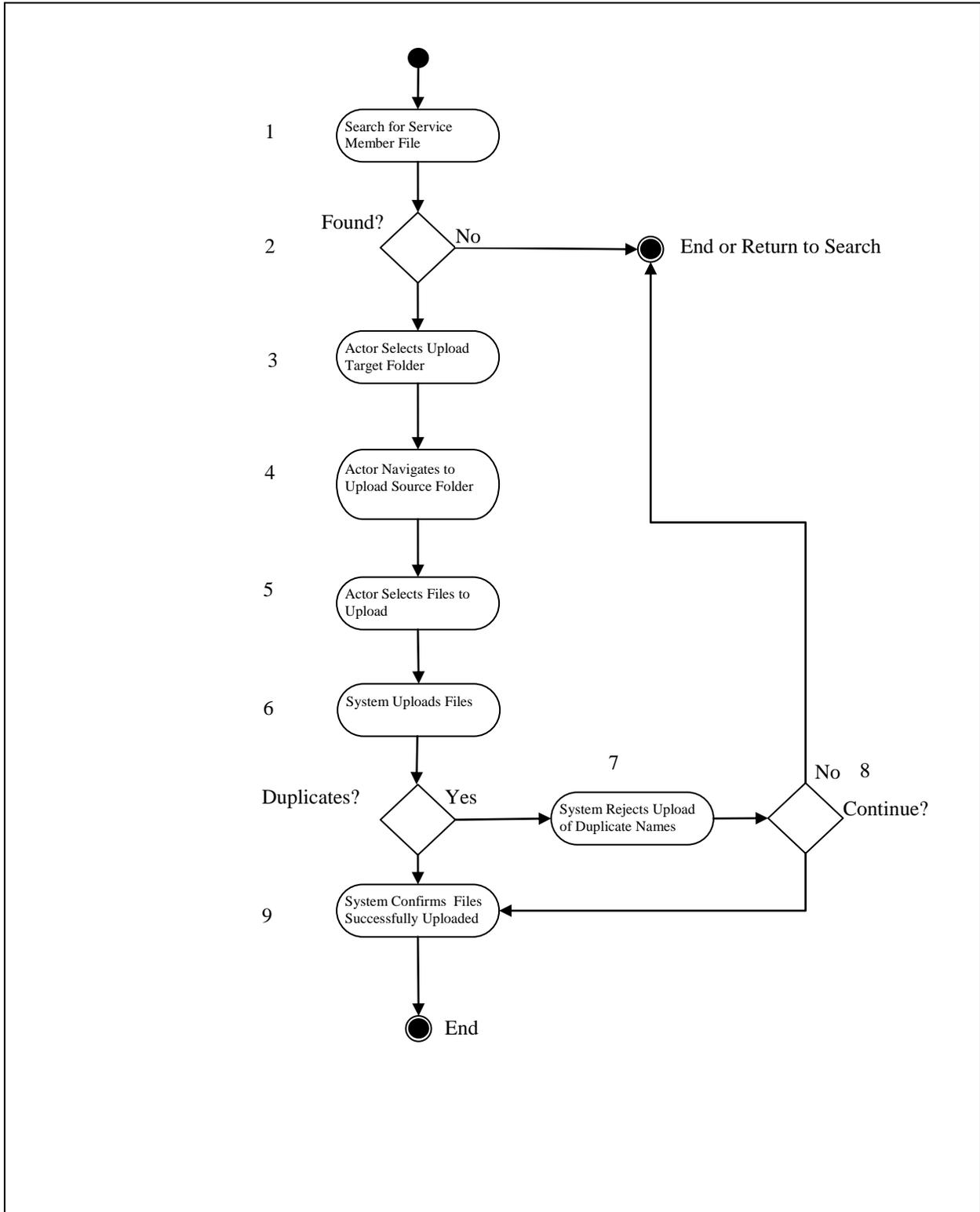
[Return to functional specifications](#)

11.3.Upload to Service Member Case File

Upload to Case File



Upload to Service Member Case File Process Flow

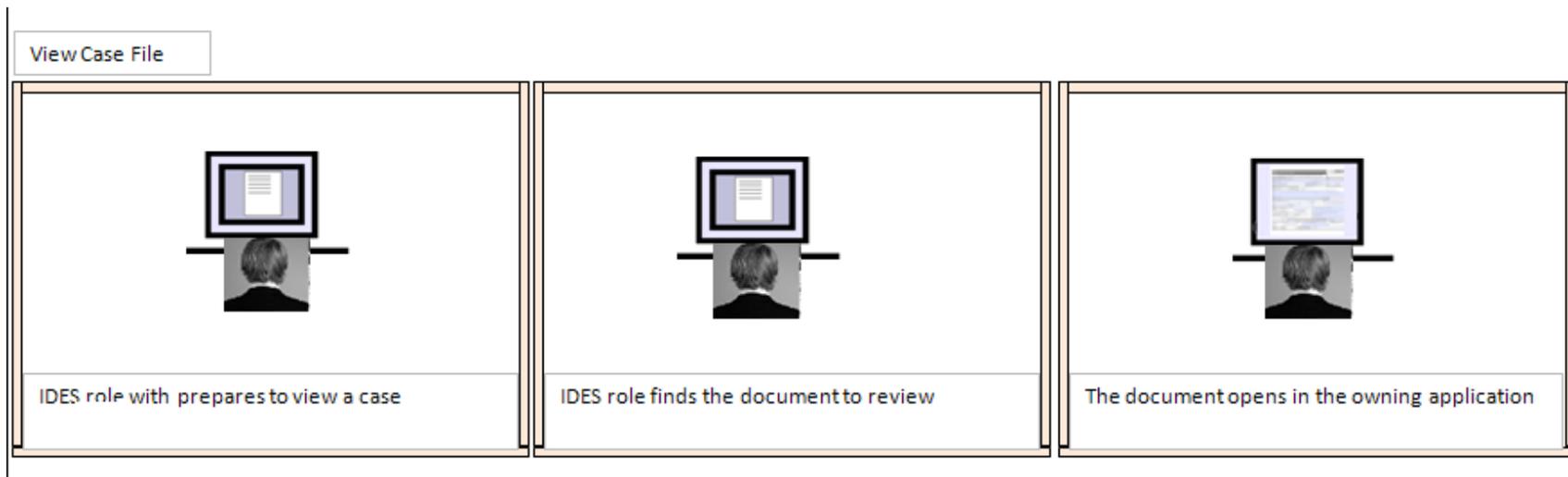


Upload to Service Member Case File Business Rules

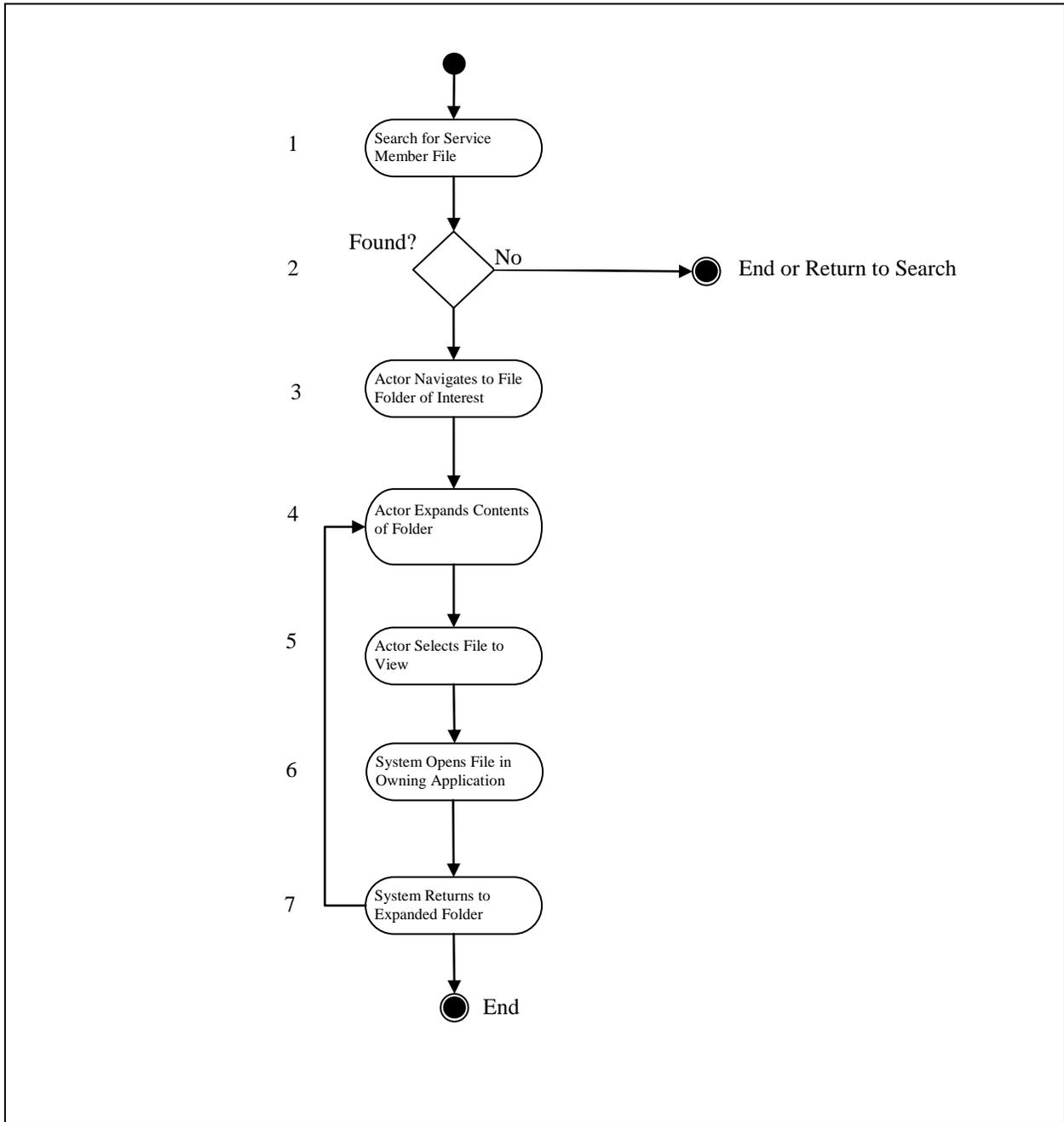
1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, if the Service Member File is not found the system ends the process or returns to search.
3. In step 3, Actor Selects Upload Target Folder, the actor selects the Service Member Case File target folder.
4. In step 4, Actor Navigates to Upload Source Folder, the actor navigates to the folder containing the files to be uploaded.
5. In step 5, Actor Selects Files to Upload, the actor may select multiple files within a source folder for uploading.
6. In step 6, System Uploads Files, the system uploads the files to the target folder.
7. In step 7, System Rejects Upload of Duplicate Names, if there are any duplicate name files the system notifies the actor. The system displays the duplicate file names that will not be uploaded.
8. In step 8, Continue?, if there were duplicates, the actor selects to cancel the function or to continue with the upload.
9. In step 9, the system confirms the files successfully uploaded.
In any step, prior to committing to the upload, the actor may cancel the function.

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View Case File



View Case File Process Flow



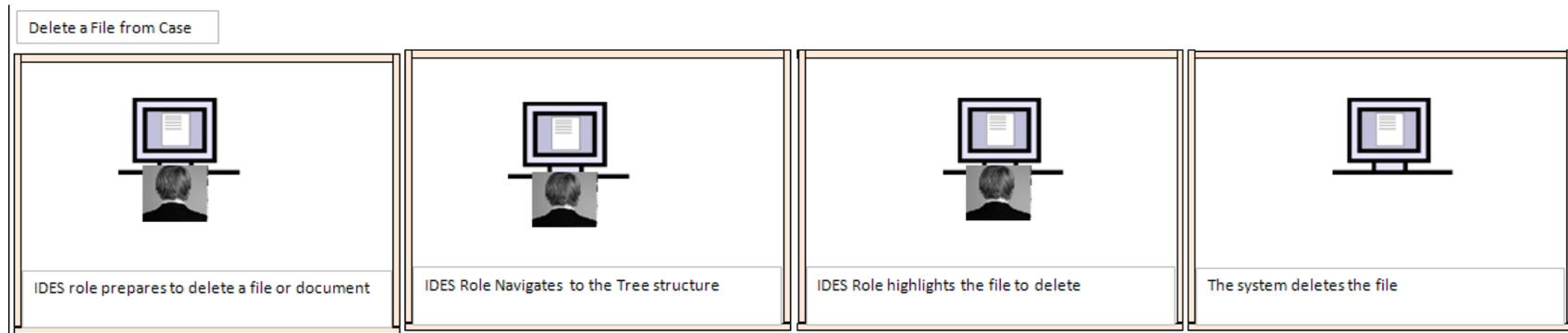
View Case Business Rules

1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, if the Service Member File is not found the system ends the process or returns to search.
3. In step 3, Actor Navigates to File Folder of Interest, the actor navigates to the case file folder of interest.
4. In step 4, Actor Expands Contents of Folder, the actor expands the case file folder to expose the documents.
5. In step 5, Actor Selects File to View, the actor selects the file to view.
6. In step 6, System Opens File in Owning Application, the system opens the file in the owning application as defined by the file extension.
7. In step 7, System Returns to Expanded Folder, the system returns to the expanded folder for additional selections.

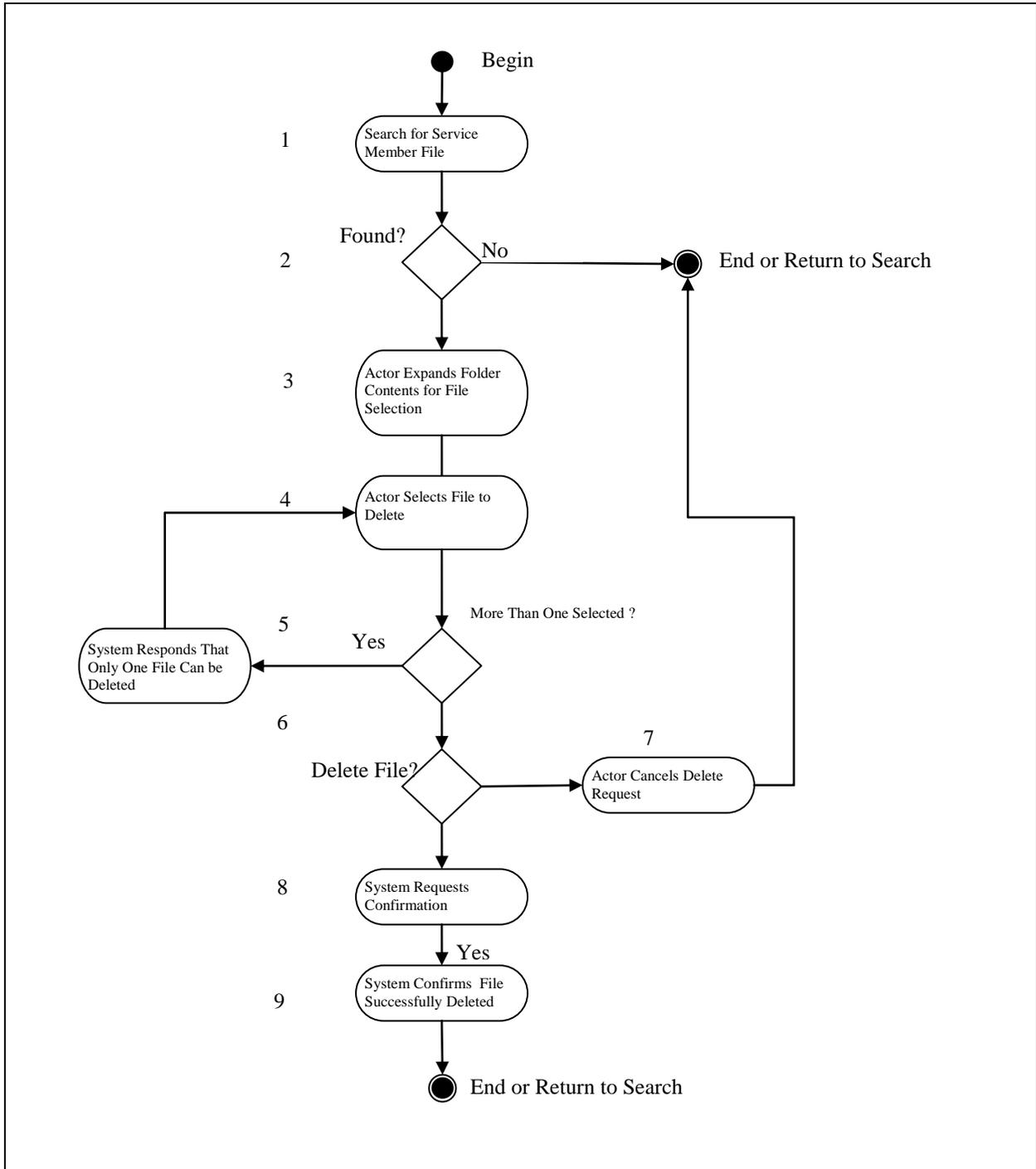
In any step, the actor may cancel the function.

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11.4.Delete a File From a Case



Delete a File From a Case Process Flow



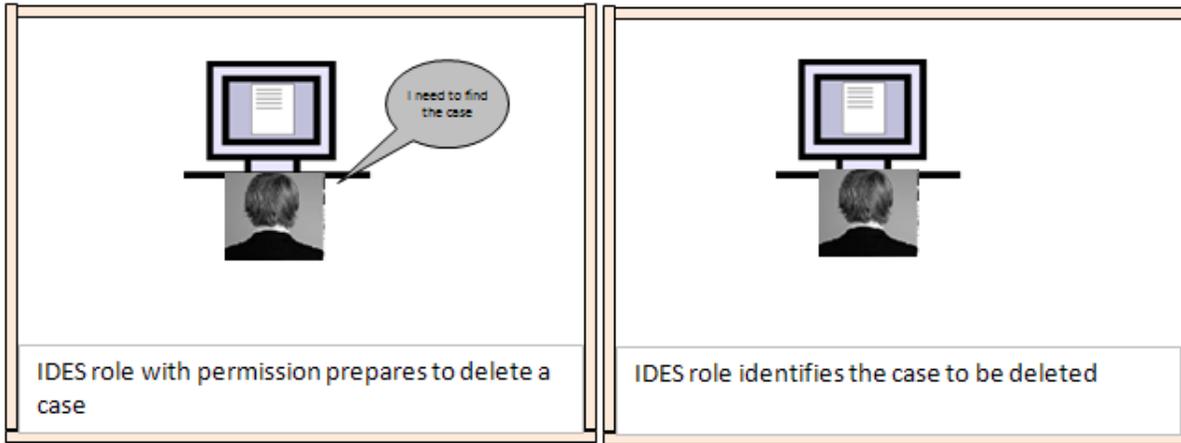
Delete a File From a Case Business Rules

1. In Step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – [Appendix F](#)
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
2. In step 2, Found?, If the Service Member File is not found the process ends or return to search.
3. In step 3, Actor Expands Contents For File Selection, the actor requests access to the folder contents.
4. In step 4, Actor Selects File to Delete, the actor selects the file to delete.
5. In step 5, More Than One Selected, the system supports deleting only one file at a time.
6. In step 6, Delete File?, the actor requests the file to be deleted or the actor can cancel the request.
7. In step 7, Actor Cancels Delete Request, the actor chooses to cancel the request.
8. In step 8, System Requests Confirmation, the actor chose to continue to delete the file.
9. In step 9, System Confirms File Successfully Deleted, the system confirms the delete and the process ends or returns to search.

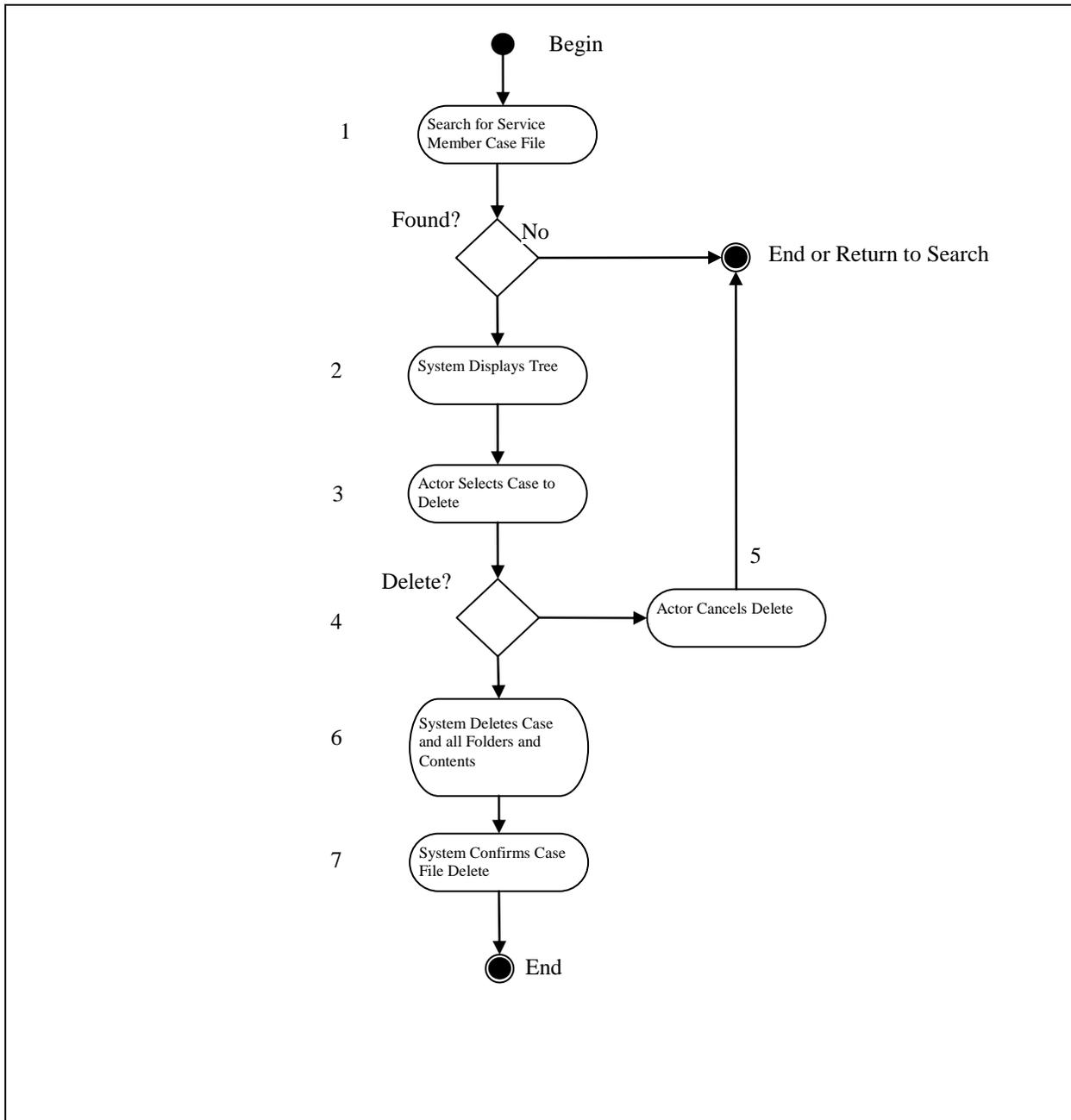
[Return to Functional Specifications](#)

11.5.Delete Service Member Case

Delete Case



Delete Service Member Case File Process Flow

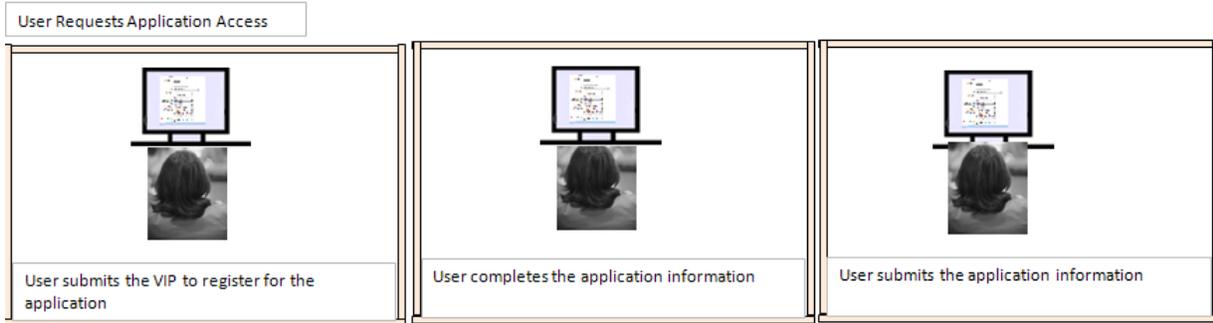


Delete Service Member Case File Business Rules

1. In step, Begin, the system checks to see if the actor has permission to delete a Service Member Case File according to Appendix H – Folder Access Permissions by Role. The request is rejected if the actor does not have the authority.
2. In step 1, Search for Service Member File, the actor may search by the following elements as defined by the Application Data Dictionary – Appendix F
 - a. Service Member Name
 - b. Social Security Number
 - c. IDES Case Identification.
3. In step 2, System Displays Tree, the system displays the Service Member File as defined by [Appendix G](#).
4. In step 3, Actor Selects Case to Delete, the actor selects the case to delete.
5. In step 4, Delete?, the system requests confirmation of the delete request.
6. In step 5, Actor Cancels Delete, the actor elects to cancel the delete request.
7. In step 6, System Deletes Case and All Folder Contents, the system deletes the Service Member Case File, folder and all contents of the folders.
8. In step 7, System Confirms Case File Delete, the system confirms the case file delete.
In any step, prior to committing to the delete, the actor may cancel the function.

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11.6. Veteran's Information Portal Request



Refer to Veteran's Information Portal Request [Appendix I](#) for detail information for this process. The data is defined by the VIP Transfer Application request.

This information is offered as reference from the VTA User Guide:



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ser_Guide Part 1.pdf

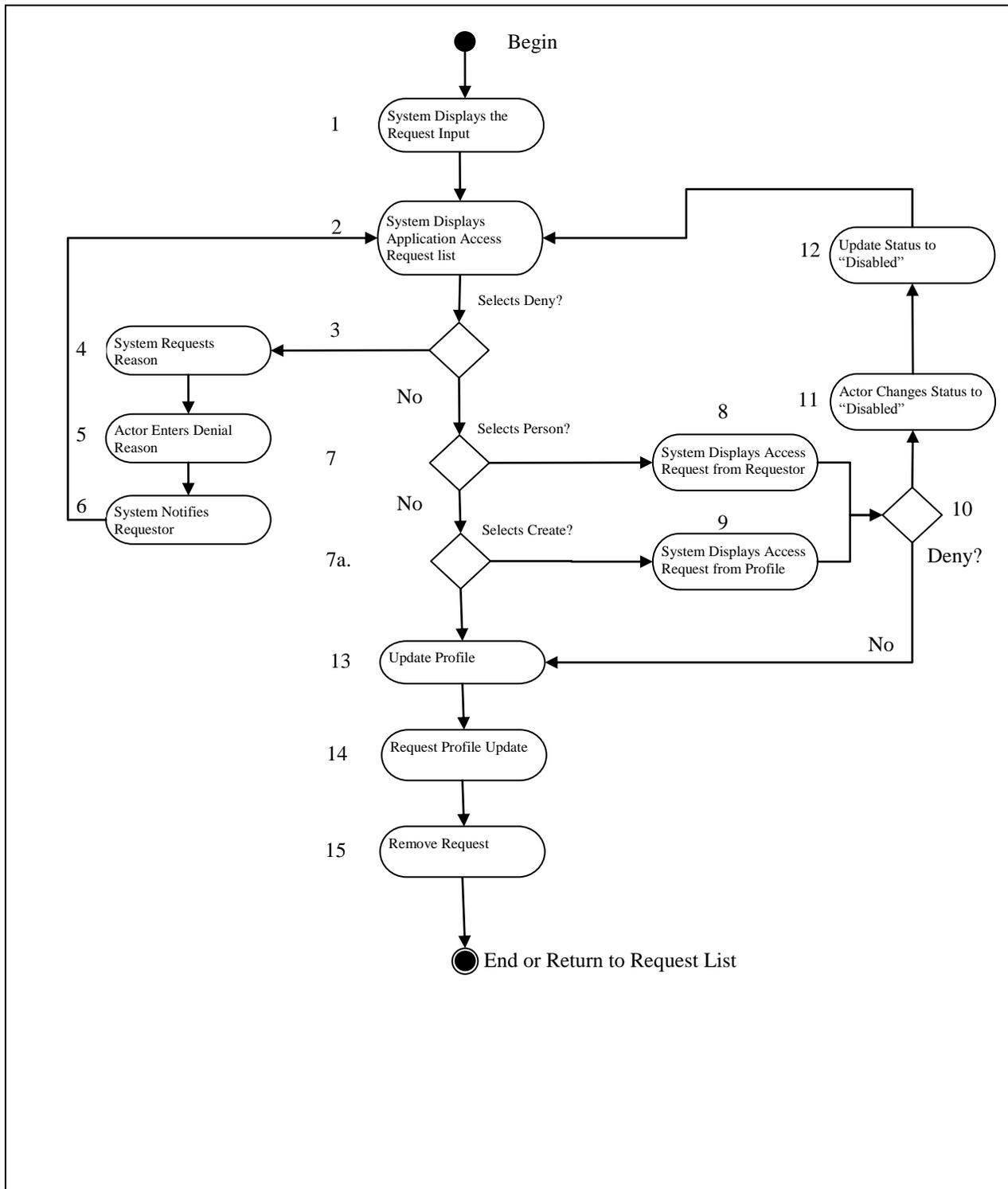
[Return to functional specifications](#)

11.7.Application User Profile Administration

Administrator Reviews User Profile Request



User Profile Request List Process Flow



User Profile Request Business Rules

1. In step, Begin, the system checks to see if the actor is an authorized to perform user profile maintenance according to Appendix H – Folder Access Permissions by Role. The request is rejected if the actor does not have the authority.
2. In step 1, Application Access Request, the actor may search on one or more of the following values as defined by the Application Data Dictionary – Appendix F:
 - a. Status
 - b. Name
 - c. Start Date
 - d. End Date
 - e. All, display all unprocessed requests.
3. In step 2, System Displays Application Access Request List, the system displays the list of outstanding requests for each person based on the selection criteria.
 - a. Requestor Name
 - b. Date (Request Date)
 - c. User Id (Network Id)
 - d. Status
4. In step 3, Selects Deny? the actor may select to deny access for a person from the list.
5. In step 4, System Requests Reason, if the actor denies the application access request the system asks for the reason for denial.
6. In step 5, Actor Enters Denial Reason, the actor enters the reason or denial.
7. In step 6, the system notifies the requestor of that the request was denied including the actor's denial reason.
8. In step 7, Selects Person?, the actor selects a person from the list.
9. In step 7a, Selects Create?, the actor selects Create to proceed to the user profile application data.
10. In step 8, System Displays Access Request from Requestor, the system displays the user input access request data as defined by [Appendix F](#).

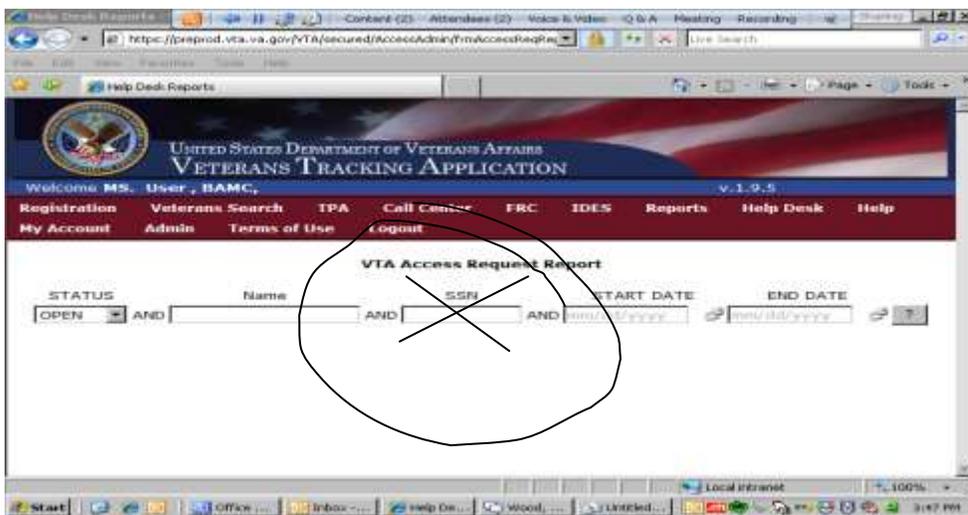
Name	First	Last	
Rank/Grade			
SSN			
Email Address[]			
Military Treatment Facility	[--SELECT FACILITY]		
VHA Facility	[--SELECT VHA FACILITY--]		
Additional VHA Facilities (if necessary)	<input type="checkbox"/> Help me see what is selected [-- None --] Hold the ctrl key to make multiple selections		
VA Regional Office	[--SELECT VARO --]		
VBA Area Office (if Area Officer)	[--SELECT AREA OFFICE]		
Veterans Integrated Systems Network	[--SELECT VISN --]		
IDES DRAS Location	[--SELECT IDES DRAS]		
IDES Service	[]		
IDES MEB MTF	[] Hold the ctrl key to make multiple selections		
IDES PEB Location	[] Hold the ctrl key to make multiple selections		
DoD Roles	<input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO) <input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO Assistant)/MEB Clerk <input type="checkbox"/> Medical Evaluation Board Member <input type="checkbox"/> PEB Administration <input type="checkbox"/> Physical Evaluation Board Member <input type="checkbox"/> Service Headquarters <input type="checkbox"/> Personnel Headquarters <input type="checkbox"/> Service Superuser <input type="checkbox"/> DoD System Administrator <input type="checkbox"/> DoD Reader		
VBA Roles	<input type="checkbox"/> Military Service Coordinator (MSC) <input type="checkbox"/> Veteran's Service Representative(MTF) <input type="checkbox"/> Veteran's Service Representative(DRAS) <input type="checkbox"/> Claims assistant(MTF) <input type="checkbox"/> Claims assistant(DRAS) <input type="checkbox"/> Rating Veteran Service Representative (RVSR) <input type="checkbox"/> Decision Review Officer (DRO) <input type="checkbox"/> Analysts Manager(MTF/RO) <input type="checkbox"/> Manager(DRAS) <input type="checkbox"/> VA Superuser <input type="checkbox"/> VBA System Administrator <input type="checkbox"/> VBA Reader		
VHA Roles	<input type="checkbox"/> Scheduling Clerk <input type="checkbox"/> C&P Exam Provider (staff and contract)		
Are You A Vip Portal User?	[]		
VIP Portal Username (only if you are a VIP Portal User)	[]		
Require Access To Health Info.?	[]		
Supervisor's Name	[] First	[] Last	
Supervisor's Phone	[] Phone		
Supervisor's Email Address	[]		
Mailing Address	[]		
Street	[]	[]	[]
	City	State	Zip
Telephone	[] Commercial	[] DSN	

In step 9, System Displays Access Request from Profile, the system displays the application user profile request data as defined by [Appendix F](#).

Pay Grade	LASTNAME	FIRSTNAME
MTF Facility	[--SELECT FACILITY]	
Active VHA Facility	[--SELECT VHA FACILITY --]	
Additional VHA Facilities (if necessary)	<input type="checkbox"/> Help see what is selected <input type="checkbox"/> Hold the ctrl key to make multiple selections	
VARO	[--SELECT VARO --]	
VBA Area Office (if an Area Officer)	[--SELECT AREA OFFICE]	
VISN	[--SELECT VISN --]	
IDES DRAS Location	[--SELECT IDES DRAS]	
IDES Service	[]	
IDES MEB MTF	<input type="checkbox"/> <input type="checkbox"/> Hold the ctrl key to make multiple selections	
IDES PEB Location	<input type="checkbox"/> <input type="checkbox"/> Hold the ctrl key to make multiple selections	
Status	[Enabled]	
Email	[]	
Phone	[]	
Notes	[]	
VIP Portal User (if yes, type Login id of portal user below)	[]	
LOGIN ID	[]	
DoD Roles	<input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO) <input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO Assistant)/MEB Clerk <input type="checkbox"/> Medical Evaluation Board Member <input type="checkbox"/> PEB Administration <input type="checkbox"/> Physical Evaluation Board Member <input type="checkbox"/> Service Headquarters <input type="checkbox"/> Personnel Headquarters <input type="checkbox"/> Service Superuser <input type="checkbox"/> DoD System Administrator <input type="checkbox"/> DoD Reader	
VBA Roles	<input type="checkbox"/> Military Service Coordinator (MSC) <input type="checkbox"/> Veteran's Service Representative(MTF) <input type="checkbox"/> Veteran's Service Representative(DRAS) <input type="checkbox"/> Claims assistant(MTF) <input type="checkbox"/> Claims assistant(DRAS) <input type="checkbox"/> Rating Veteran Service Representative (RVSR) <input type="checkbox"/> Decision Review Officer (DRO) <input type="checkbox"/> Analysts Manager(MTF/RO) <input type="checkbox"/> Manager(DRAS) <input type="checkbox"/> VA Superuser <input type="checkbox"/> VBA System Administrator <input type="checkbox"/> VBA Reader	
VHA Roles	<input type="checkbox"/> Scheduling Clerk <input type="checkbox"/> C&P Exam Provider (staff and contract) <input type="checkbox"/> VHA Reader	

11. In step 10, Deny?, the actor elects to deny the request.
 12. In step 11, Actor Changes Status to Disabled, if the actor denies the request the Application Access Status is set to “Disabled”.
 13. In step 12, if the actor sets the status to “Disabled“ the system updates the status and the system returns to the Application Request List.
 14. In step 13, Update Profile, the actor updates the application request data.
 15. In step 14, Update Profile, the system updates the application user profile record.
 16. In step 15, Remove Request, the approved request is removed from the Application Request List.
- In any step, the actor may cancel the function.

The process is very similar to the existing VTA process of and this is offered only as reference. The step 1 equivalent in VTA looks like this:

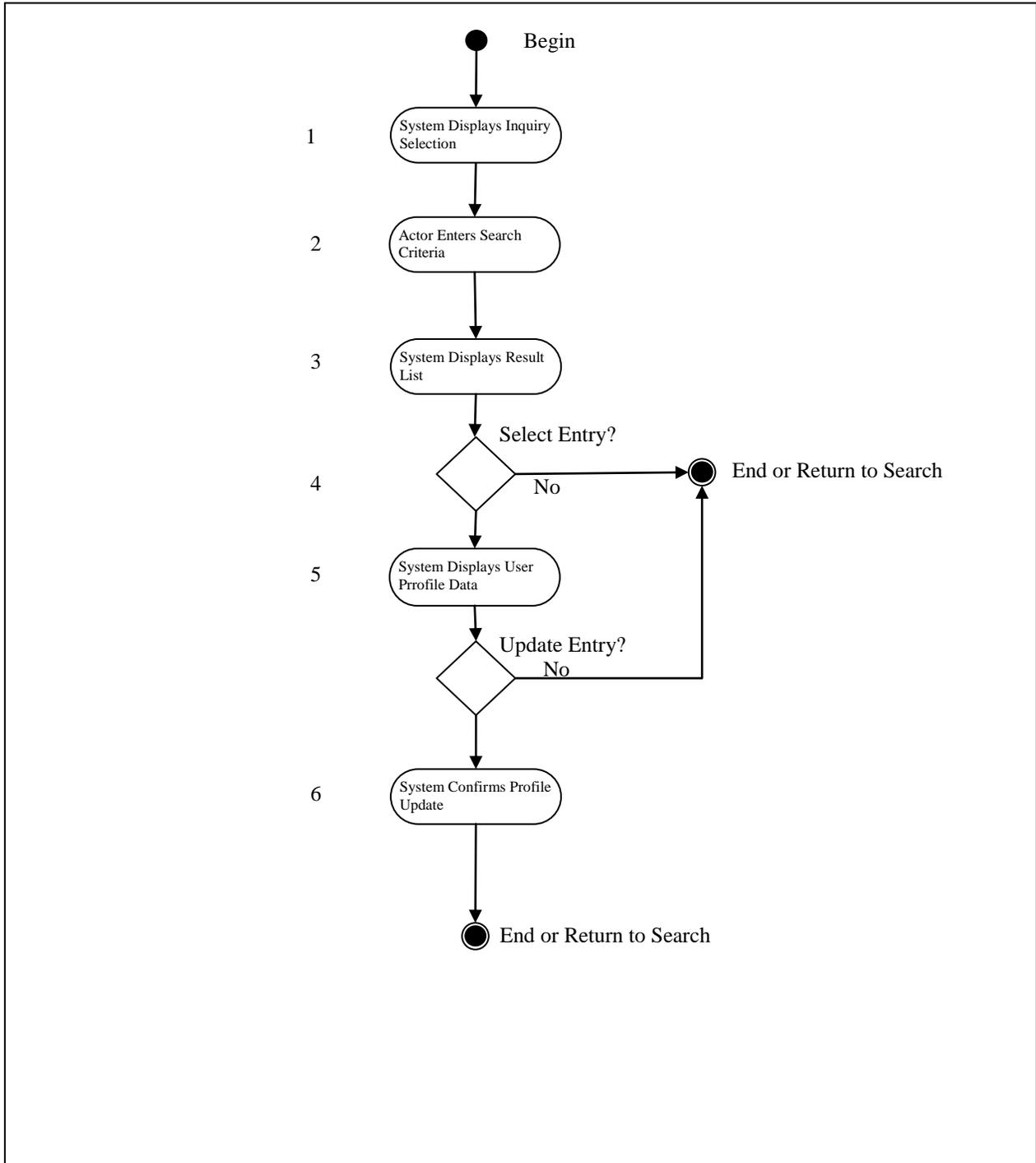


The SSN is being excluded from the requirements for this application.

In VTA, the message notification that is sent to the requestor of approval or denied is a system generated email.

[Return to functional specifications](#)

User Profile View / Update



User Profile View / Update Business Rules

1. In step, Begin, the system checks to see if the actor is an authorized to perform user profile maintenance according to Appendix H – Folder Access Permissions by Role. The request is rejected if the actor does not have the authority.
2. In step 1, System Displays Inquiry Selection, the system display a request for the following:
 - a. Social Security Number
 - b. Name
3. In step 2, Actor Enters Search Criteria, the actor enters the search criteria.
4. In step 3, System Displays Result List, the system displays the result list.
5. In step 4, Select Entry?, the actor selects a user profile record to view / update or elects to return to the search.
6. In step 5, System Displays User Profile Data, the system displays the selected user profile record as depicted in Figure 1 and as defined by [Appendix F](#) – Application Data Dictionary.
7. In step 6, Update Entry, the actor inputs or changes the profile data and selects update. The actor may cancel out of any update for it is committed and return to the search.
8. In step 7, System Confirms Profile Update, the system confirms a profile record update.

The process is very similar to the existing VTA process of and this is offered only as reference. The step 1 equivalent in VTA looks like this:

Application Admin - v

Content (2) Attendees (2) Voice & Video Q & A Meeting Recording Sharing

https://preprod.vta.va.gov/VTA/secured/AccessAdmin/frAppAccess.as

File Edit View Favorites Tools Help

Application Admin

UNITED STATES DEPARTMENT OF VETERANS AFFAIRS
VETERANS TRACKING APPLICATION

Welcome MS. User, BAMC, v.1.9.5

Registration Veterans Search TPA Call Center FRC IDES Reports Help Desk Help
My Account Admin Terms of Use Logout

Application Access Management

SSN ? FIND ACCOUNT BY NAME ?

SSN RANK LAST NAME FIRST NAME

Done Local intranet 100%

Start Office... Inbox... Applic... Wood... Untitled... 3:44 PM

12. Appendix F – Application Data Dictionary

Data Group	Data Element	AKA	Source	Data Type	Date Type Format	Data Values
Service Member	Case File Identification	IDES Case Id	User Input	Alpha-Numeric		
Service Member	Service Member Social Security Number	SSN	User Input	Numeric		Last 4 digits only
Service Member	Service Member Name		User Input	Name	Last, First Middle	
Service Member	Date of Birth	DOB	User Input	Date	MMDDYYYY	
Service Member	Pay Grade		User Input	Alpha-Numeric		
Service Member	Gender		User Input		List	Male, Female
Service Member	Branch of Service		User Input		List	Army, Navy, Air Force, Marine Corps, Coast Guard
Service Member	Component		User Input		List	Active, Guard, Reserve
VIP Registration	MTF Facility		VIP selection for this application		List	Already Defined to VIP
VIP Registration	Active VHA Facility		VIP selection for this application		List	Already Defined to VIP
VIP Registration	Additional VHA Facilities		VIP selection for this		List	Already Defined to VIP

			application			
VIP Registration	VARO		VIP selection for this application		List	Already Defined to VIP
VIP Registration	VBA Area Office		VIP selection for this application		List	Already Defined to VIP
VIP Registration	VISN		VIP selection for this application		List	Already Defined to VIP
VIP Registration	IDES DRAS Location		VIP selection for this application		List	Already Defined to VIP
VIP Registration	IDES Service		VIP selection for this application		List	Already Defined to VIP
VIP Registration	IDES MEB MTF		VIP selection for this application		List	Already Defined to VIP
VIP Registration	IDES PEB Location		VIP selection for this application		List	Already Defined to VIP
VIP Registration	User Roles		VIP selection for this application			Appendix H

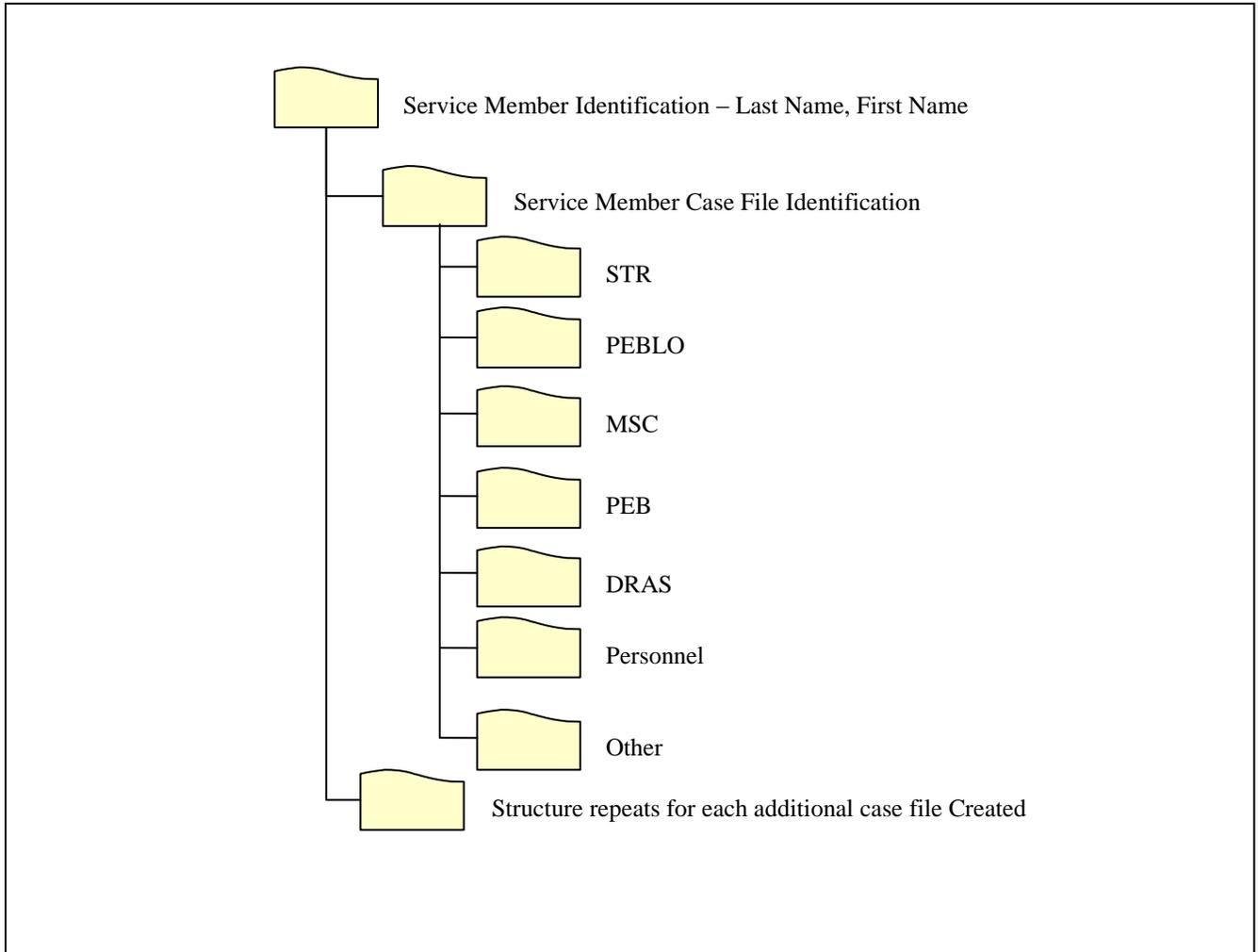
VIP Registration	Supervisor's Last Name		VIP selection for this application			
VIP Registration	Supervisor's First Name		VIP selection for this application			
VIP Registration	Supervisor's Phone		VIP selection for this application			
VIP Registration	Supervisor's Email Address		VIP selection for this application			
VIP Registration	Mailing Address		VIP selection for this application			
VIP Registration	Street Line 1		VIP selection for this application			
VIP Registration	Street Line 2		VIP selection for this application			
VIP Registration	City		VIP selection for this application			
VIP Registration	State		VIP selection for this application			
VIP Registration	Zip		VIP selection for this application			

VIP Registration	Telephone Commercial		VIP selection for this application			
VIP Registration	Telephone DSN		VIP selection for this application			
Application Access Request	Requestor Name		Application Access Request List			Last, First Middle
Application Access Request	Request Date		Application Access Request List			
Application Access Request	User Id	Network Id	Application Access Request List			
Application Access Request	Status		Application Access Request List			Open, Denied, Approved
Start Date			Application Action Request List			The date the request was submitted by the requestor.
End Date			Application Action Request List			The date the request was denied by the administrator.

User Profile	MTF Facility		Application User Profile			To be provided by customer
User Profile	Active VHA Facility		Application User Profile			To be provided by customer
User Profile	Additional VHA Facilities		Application User Profile			To be provided by customer
User Profile	VARO		Application User Profile			To be provided by customer
User Profile	VBA Area Office		Application User Profile			To be provided by customer
User Profile	VISN		Application User Profile			To be provided by customer
User Profile	IDES DRAS Location		Application User Profile		List	Seattle, Baltimore, Providence
User Profile	IDES Service		Application User Profile		List	Army, Navy, Air Force, Marine Corps, Coast Guard
User Profile	IDES MEB MTF		Application User Profile		List	To be provided by customer

User Profile	IDES PEB Location		Application User Profile		List	Coast Guard PEB Arlington, VA Louis JB, WA San Antonio JB (Randolph),TX San Antonio JB (Sam Houston), TX Walter Reed Army Med. Cen. Washington Navy Yard
User Profile	User Roles		Application User Profile			Appendix H
User Profile	Status		Application User Profile		List	Enabled, Disabled
User Profile	Email		Application User Profile	Email Standard		
User Profile	Phone		Application User Profile	Phone Standard		
User Profile	Notes		Application User Profile	Free Text		
User Profile	VIP Portal User		Application User Profile		List	Yes, No
User Profile	VIP Login Id		Application User Profile	Network		
User Profile	User Roles		Application User Profile		List	Appendix H

13. Appendix G – Service Member File Tree



The above tree structure is the default structure as required by the business. It corresponds to the work flow of the IDES process. The business will define the content and naming convention for folder contents and will be documented as a business policy and procedure. There are no requirements regarding content and naming convention other than to be able to upload to the folders.

14. Appendix H – Folder Access Permissions by Role

	STR			PEBLO			MSC			PEB			D-RAS			Personnel			Other			Create/ Update Case	Delete Case	Create User Profile
	C(Upload)	R	D																					
Department of Defense																								
Senior PEBLO	x	x	x	x	x	x			x				x			x	x	x	x	x	x			
Physical Evaluation Board Liaison Officer (PEBLO)	x	x	x	x	x	x			x				x			x	x	x	x	x	x			
Physical Evaluation Board Liaison Officer (PEBLO Assistant)/MEB Clerk	x	x	x	x	x	x			x				x			x	x	x	x	x				
Medical Evaluation Board Member		x			x				x															
PEB Administration		x			x				x	x			x			x	x	x	x	x				
Physical Evaluation Board Member		x			x				x				x			x				x				
Service Headquarters		x			x				x	x			x			x	x	x	x	x				
Personnel Headquarters																x	x	x	x	x				
Service Superuser	x	x	x	x	x	x			x	x			x			x	x	x	x	x	x	x	x	
DoD System Administrator																								x

15. Appendix I – Veteran’s Information Portal (VIP) Request



The request for access to the application will be added to the VIP Request screen.

Veteran's Information Portal Request Information

Name	First	Last
Rank/Grade		
SSN		
Email Address[]		
Military Treatment Facility	[--SELECT FACILITY]	
VHA Facility	[--SELECT VHA FACILITY--]	
Additional VHA Facilities (if necessary)	<input type="checkbox"/> Help me see what is selected [--None --] Hold the ctrl key to make multiple selections	
VA Regional Office	[--SELECT VARO --]	
VBA Area Office (if Area Officer)	[--SELECT AREA OFFICE]	
Veterans Integrated Systems Network	[--SELECT VISN --]	
IDES DRAS Location	[--SELECT IDES DRAS]	
IDES Service	[]	
IDES MEB MTF	[] Hold the ctrl key to make multiple selections	
IDES PEB Location	[] Hold the ctrl key to make multiple selections	
DoD Roles	<input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO) <input type="checkbox"/> Physical Evaluation Board Liasion Officer (PEBLO Assistant)/MEB Clerk <input type="checkbox"/> Medical Evaluation Board Member <input type="checkbox"/> PEB Administration <input type="checkbox"/> Physical Evaluation Board Member <input type="checkbox"/> Service Headquarters <input type="checkbox"/> Personnel Headquarters <input type="checkbox"/> Service Superuser <input type="checkbox"/> DoD System Administrator <input type="checkbox"/> DoD Reader	
VBA Roles	<input type="checkbox"/> Military Service Coordinator (MSC) <input type="checkbox"/> Veteran's Service Representative(MTF) <input type="checkbox"/> Veteran's Service Representative(DRAS) <input type="checkbox"/> Claims assistant(MTF) <input type="checkbox"/> Claims assistant(DRAS) <input type="checkbox"/> Rating Veteran Service Representative (RVSR) <input type="checkbox"/> Decision Review Officer (DRO) <input type="checkbox"/> Analysts Manager(MTF/RO) <input type="checkbox"/> Manager(DRAS) <input type="checkbox"/> VA Superuser <input type="checkbox"/> VBA System Administrator <input type="checkbox"/> VBA Reader	
VHA Roles	<input type="checkbox"/> Scheduling Clerk <input type="checkbox"/> C&P Exam Provider (staff and contract)	
Are You A Vip Portal User?	[]	
VIP Portal Username (only if you are a VIP Portal User)	[]	
Require Access To Health Info.?	[]	
Supervisor's Name	[] First	[] Last
Supervisor's Phone	[] Phone	
Supervisor's Email Address	[]	
Mailing Address	[]	
Street	[]	
	[] City	[] State
		[] Zip
Telephone	[] Commercial	[] DSN

The information gathered on this request shall be passed to the application's user profile request list. Refer to Appendix F – Applicaton Date Dictionary for additional information on the data elements depicted here.

Attachment A - Approval Signatures

This section is used to document the approval of the Requirements Specification Document during the Formal Review. The review should be ideally conducted face to face where signatures can be obtained 'live' during the review however the following forms of approval are acceptable:

1. Physical signatures obtained face to face or via fax
2. Digital signatures tied cryptographically to the signer
3. /es/ in the signature block provided that a separate digitally signed e-mail indicating the signer's approval is provided and kept with the document

The Chair of the governing Integrated Project Team (IPT), Business Sponsor, IT Program Manager, and the Project Manager are required to sign. Please annotate signature blocks accordingly.

REVIEW DATE: *11/06/2011*

SCRIBE: *Gibbs, Ron; Gardner, Dee Dee*

Signed:

Date:

Lawrence Fink, Director, IDES Management Office, VA/DoD Collaboration Services, VA OPP

From: Herron, LaShaun

Sent: Tuesday, October 25, 2011 2:39 PM

To: Fink, Lawrence (SES)

Cc: French, Kevin (Grant Thornton); Antonellis, James; Smith, Carl; Kline, Mary Beth (Grant Thornton)

Subject: FW: rIDES POC RSDv3 (eCase File Transfer)

Good afternoon Mr. Fink, the requirements specification document looks great. Below are just a few minor changes/recommendations:

- RSDv3, pg. 2, first paragraph under the chart, fourth line - What does "enteritis" mean? [Ron Gibbs] should have been the word "entities" meaning organizations change applied
- RSDv3, pg. 2, section 2 (Overall Specifications), first paragraph – second line, insert the word "to" between "takes" and "adjudicate" [Ron Gibbs] change applied
- RSDv3, pg. 6, section 2.4.5 (Administrative), delete the word "to" between the words "users" and "the"[Ron Gibbs] changed applied
- RSDv3, pg. 8, Appendix A (Acronyms and Definitions), the definition for PCGL should be – Personal Computer Generated Letters [Ron Gibbs] change applied
- RSDv3, Attachment A (Approval Signatures), Mr. Fink name is missing[Ron Gibbs] change applied

Once these minor changes are made, I recommend concurrence.

__<<No Response>>_____

Signed:

Date:

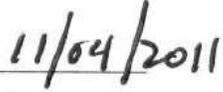
Danny Devine, Project Officer, OD/MA

__<<No Response>>_____

Signed:

Date:

Danny Pummill, Director, VBA CP

John R. Campbell, DASD (WWCTP)

Date

Concur with comments from Army, Navy, Health Affairs and WWCTP IDES Operations.