

## Requesting, Accessing, and Obtaining Information Used to Inform and Document Program of Comprehensive Assistance for Family Caregivers (PCAFC) Decisions: Instructions for Accredited Representatives

This document provides an overview of the VA systems in which PCAFC decision information and supporting evidence is maintained by the Veterans Health Administration (VHA), describes the type of relevant information maintained in these systems, and includes instructions for how to request access to the information within each system.

**System: Electronic Health Record (EHR)** The EHR system is software used by VHA for maintaining patient health records generated in the provision of health care.

**Type of Information Available:** Information within the EHR system that may inform PCAFC decisions includes:

- Clinical notes from medical providers, including primary care, mental health (psychiatry, psychology, PTSD clinic, etc.), and specialty care providers (Traumatic Brain Injury (TBI), home based primary care, Spinal Cord, neurology, etc.)
- PCAFC assessments and evaluations
- Clinical contacts by Caregiver Support Program (CSP) staff, including notes regarding Monitoring Visits and Wellness Contacts

**To Request Access To and/or Information From the EHR:** Access to the information within the EHR may be obtained through direct access to VA's Compensation and Pension Record Interchange or by submitting a written request for information to obtain paper or digital copies of records.

- **To Obtain System Access to an Individual's EHR via VA's Compensation and Pension Record Interchange (CAPRI):**
  - Access is contingent upon the Veteran or caregiver claimant executing a power of attorney (POA) authorizing the accredited representative unlimited and unrestricted access to all medical records, including sensitive records protected by 38 U.S.C. § 7332.
  - Prior to requesting access to an individual's electronic health record via CAPRI, accredited representatives must first be granted access to the VA Network. Please reach out to the Change Management Office at your closest VA Regional Office for more information. A list of Change Management Points of Contact (POCs) is available at: <https://www.benefits.va.gov/COMPENSATION/cma-poc.asp#S>
  - To request CAPRI access, accredited claims agents, attorneys, and VSO representatives must submit the Special User Access Form for VSO. The link to this form along with details for how to request access is located at: <http://vaww.vhadataportal.med.va.gov/DataAccess/VeteransServiceOfficersAccess.aspx>.
  - Note: Currently, there is not an option for accredited representatives to access the Oracle CERNER system. If a record has been migrated to the Oracle CERNER EHR, accredited representatives should follow the process outlined below to request paper or digital copies of information.

- **To Obtain Information from the Electronic Health Record (i.e., paper or digital format):**
  - Submit a signed, written statement that identifies the specific information being requested to the local VA Release of Information Office. To find the location of VA facilities, please visit <https://www.va.gov/directory/guide/home.asp>.
  - Documentation of your authority to act as the individual's authorized representative must accompany your request for information, e.g., VA Form 21-22, *Appointment of Veterans Service Organization as Claimant's Representative* or VA Form 21-22a, *Appointment of Individual as Claimant's Representative*. VA Form 10-5345, *Request For and Authorization to Release Health Information* may also be used to obtain access to information from the Electronic Health Record. These forms are available at <https://www.va.gov/find-forms/>.

**System: Caregiver Record Management Application (CARMA)** CARMA is a workflow management tool used by the CSP, which among other purposes, is used to establish and maintain records of current and previous applicants for and participants in PCAFC. Information within CARMA generally includes dates of PCAFC evaluations, stipend tier/levels, and decision/decision dates; however, this information is captured more comprehensively within the Electronic Health Record.

**Type of Information Available:** Information within CARMA that may inform PCAFC decisions includes:

- VA Form 10-10CG, *Application for the Program of Comprehensive Assistance for Family Caregivers* (available at <https://www.va.gov/find-forms/>)
- Correspondence between individuals and CSP
- Eligibility documentation, such as DD Form 214, Hospital Inquiry (HINQ), and information from Enrollment Services

**To Request Access To and/or Information From CARMA:** System access is not available; however, information from CARMA may be requested.

- Submit a signed, written statement that identifies the specific information being requested to the local Facility Caregiver Support Program team. To find the location of VA facilities and telephone numbers of local CSP teams, please visit [https://www.caregiver.va.gov/support/New\\_CSC\\_Page.asp](https://www.caregiver.va.gov/support/New_CSC_Page.asp).
- Documentation of your authority to act as the individual's authorized representative must accompany your request for information, e.g., VA Form 21-22, *Appointment of Veterans Service Organization as Claimant's Representative* or VA Form 21-22a, *Appointment of Individual as Claimant's Representative*. VA Form 10-5345, *Request For and Authorization to Release Health Information* may also be used to obtain access to information from CARMA. These forms are available at <https://www.va.gov/find-forms/>.

**System: Patient Advocate Tracking System-Replacement (PATS-R)** PATS-R is a tool used to document Veteran compliments and complaints, as well as requests from Veterans or caregivers for PCAFC Clinical Reviews (also referred to as Clinical Appeals).

**Type of Information Available:** Information within PATS-R that may inform PCAFC decisions includes:

- Information submitted by Veteran/caregiver requesting a VHA clinical review
- Letters sent to Veteran/caregiver regarding PCAFC Clinical Review (also referred to as Clinical Appeal) decisions and reasons for decisions rendered

**To Request Access To and/or Information From PATS-R:** System access is not available; however, information from PATS-R may be requested.

- Submit a signed, written statement that identifies the specific information being requested to the local Privacy Officer that handles Privacy and Freedom of Information Act (FOIA) requests. To find the location of VA facilities, please visit <https://www.va.gov/directory/guide/home.asp>.
- Documentation of your authority to act as the individual's authorized representative must accompany your request for information, e.g., VA Form 21-22, *Appointment of Veterans Service Organization as Claimant's Representative* or VA Form 21-22a, *Appointment of Individual as Claimant's Representative*. VA Form 10-5345, *Request For and Authorization to Release Health Information* may also be used to obtain access to information from PATS-R. These forms are available at <https://www.va.gov/find-forms/>.