

# **NEW VACI PORTAL - MEDICAL SERVICES**

*Instructional Manual to direct  
vets through New VACI Nexus  
Buddy process*



1. Go to the Hub - Click on the VMC's Tab
2. click on VACI Credential Creation

The screenshot shows the website interface for VA Claims Insider. The navigation menu includes: Home, Company, Directory, VMC's, Marketing, Ops, HR, IT, News, Newsletter, and Contact. A dropdown menu is open under 'VMC's', listing: Our Teams, Give Elite Service, Coaching vs Consulting, Claims Explained, Medical Forms, Telemedica, VC Resources, and VACI Credential Creation. A red arrow points to the 'VACI Credential Creation' link.

Below the menu is a table titled '2\_VA Claims Insider Company Directory- 2020'. The table lists various roles, names, last names, email addresses, phone numbers, and time zones.

Role	First Name	Last Name	Email	Phone	Time Zone
Technical Operations Manager	Kalcey	Culpepper	kculpepper@vaclaimsinsider.com	678-898-4336	EST
Business Support Analyst	Shanna	Raper	sraper@vaclaimsinsider.com	501-392-8764	CST
Provider Trainer & Support Specialist for Telemedica	Bianca	Patterson	bpatterson@telemefy.com	817-658-6823	CST
Data Entry Clerk for Telemedica	Jeremy	Hellums	jhellums@telemefy.com	N/A	
Virtual Assistant	Eric Jan S.	Rovelo	erovelo@vaclaimsinsider.com	(+63) 908 865 3649	GMT+8
IT Technician	Reginald	Brown	rbrown@vaclaimsinsider.com	470-460-0745	EST
IT Support Specialist	Terrence	Reese	treese@vaclaimsinsider.com	404-797-7899	EST
IT Support Liason	Ronnis	Fields	ronnis@vaclaimsinsider.com	(910) 373-0192	EST
Software Engineer	Jake	Moczydlowski	jmoczydlowski@vaclaimsinsider.com	847-445-6040	CST
Software Engineer	Scott	Remsen	sremsen@vaclaimsinsider.com	256-337-8599	CST
Jr Software Engineer	Brandon	D'Alleva	bdalleva@vaclaimsinsider.com	516-592-9498	EST
Junior Software Engineer	Christopher	Harison		678-347-0148	EST
Executive Assistant to Ronnis	Reyna Nicole	Paner	nicole@vaclaimsinsider.com	N/A	
Systems Strategy Expert	Lacey	Cahill	lcahill@vaclaimsinsider.com	(206) 228-3648	EST
Elite Experience Portal Assistant	Bea	Endaya	btrendaya@gmail.com	N/A	GMT+8
<b>EXECUTIVE ASSISTANTS</b>					
Virtual Assistant	Reyna Sierra	Rovelo	support@vaclaimsinsider.com	(+63) 919 0060106	PHT
Virtual Assistant	Kristal Ann	Manaig	kristal@vaclaimsinsider.com	N/A	PHT
<b>HR DEPT</b>					

Will be directed to the VACI Portal Credential Creation Page

## Create VACI Portal Credentials for NEW Vets

Please follow the below instructions to send your Vet their VACI Portal Credential email:

1. Confirm Vet is currently in the "Strategy Session Follow Up" stage in Pipedrive
2. Once confirmed, type in the PipeDrive Deal Number in the search bar
3. Click the blue "Create VACI Portal Credentials" Button
4. The Deal details should be revealed
  1. Deal Name
  2. Veteran's Email
  3. VC's Name
  4. VC's Email
5. Once the deal details have populated, you will see a confirmation message letting you know the credentials have been sent to the vet.
6. Please confirm with the vet after 10 mins to confirm they received them

Create VACI Portal Credentials

Put the Deal ID into the search box and click the blue " Create VACI Portal Credential" button

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Create VACI Portal Credentials

### Deal Details for 12312

Deal Name: Kim Canady Deal

Veteran Name: Kim Canady

Veteran Email: kimcward@gmail.com

VC: Laurel Reese

VC Email: laurel@vaclaimsinsider.com

Create Logins For This Veteran?

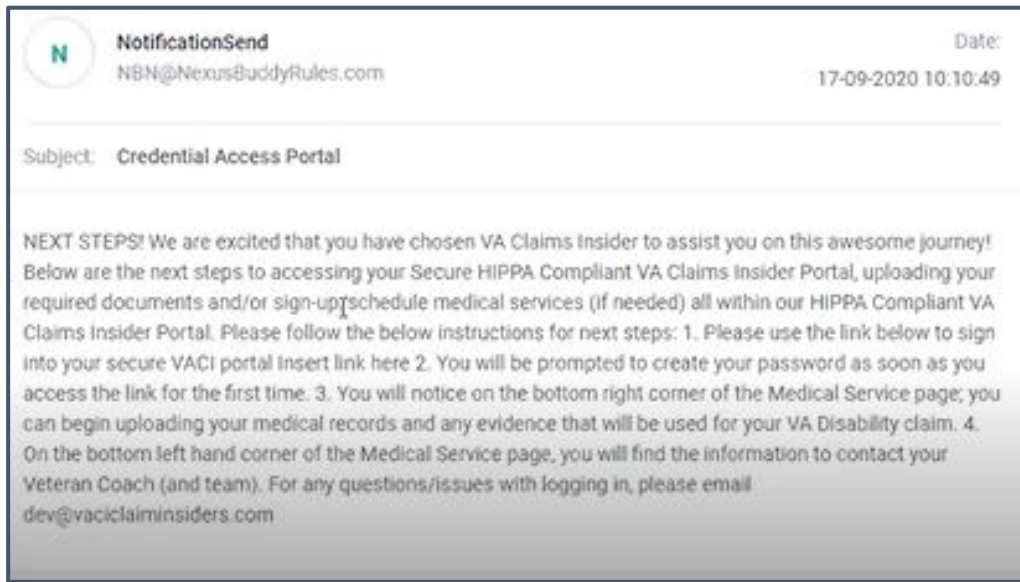
The Pipedrive Deal information will appear under the blue button:

1. Name of Deal
2. Veterans Name
3. Veterans Email
4. VC
5. VC Email

Please confirm the information

Click the red "Create Logins for This Veteran" button

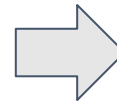




example of email

Once confirmation notification is shown during the credential creation:

- Vet will receive an email welcoming them
- Email will include a link and instructions on how to login to new portal and reset their password upon first login.



### NEXT STEPS!

We are excited that you have chosen VA Claims Insider to assist you on this awesome journey! Below are the next steps to accessing your Secure HIPPA Compliant VA Claims Insider Portal, uploading your required documents and/or sign-up/schedule medical services (if needed) all within our HIPPA Compliant VA Claims Insider Portal.

Please follow the below instructions for next steps:

1. Please use the link below to sign into your secure VACI portal

**Insert link here**

2. Your Email is your **USERNAME**

3. You will be prompted to put in your password upon clicking on the link You will be prompted to create your password as soon as you access the link for the first time.

3. You will notice on the bottom right corner of the Medical Service page; you can begin uploading your medical records and any evidence that will be used for your VA Disability claim.

4. On the bottom left hand corner of the Medical Service page, you will find the information to contact your Veteran Coach (and team).

For any questions/issues with logging in, please email dev@vaciclaiminsiders.com

# Reset password

Reset your password.

Email

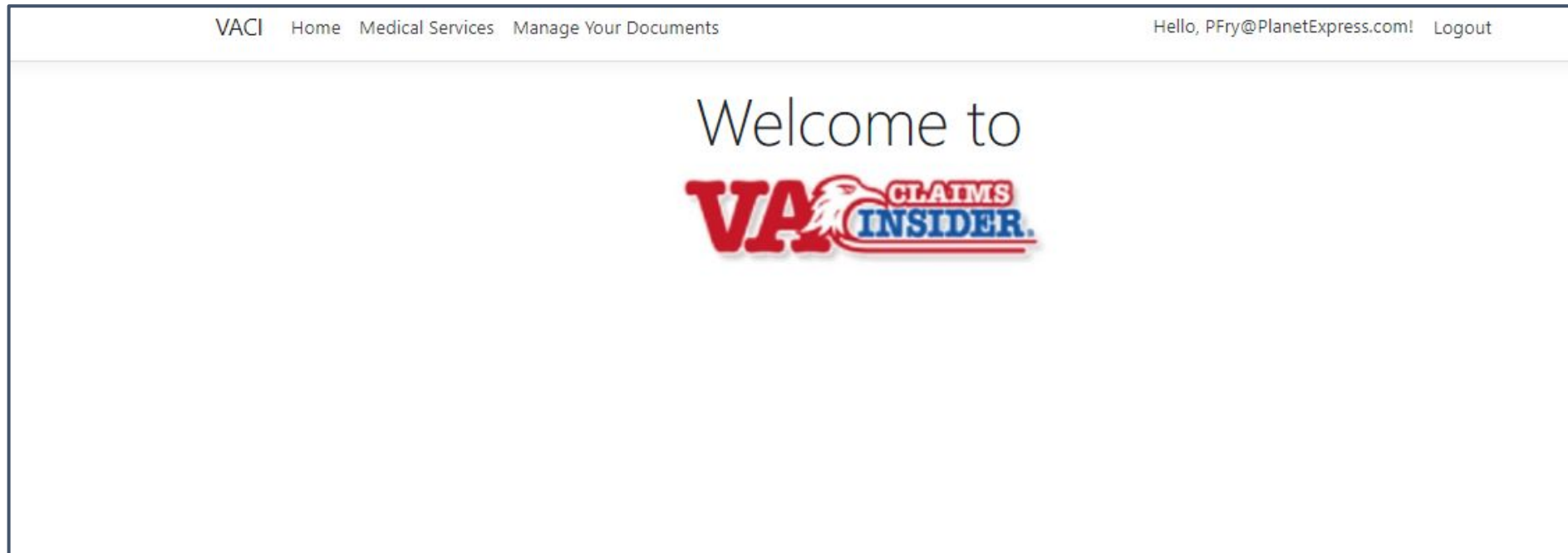
Password

Confirm password

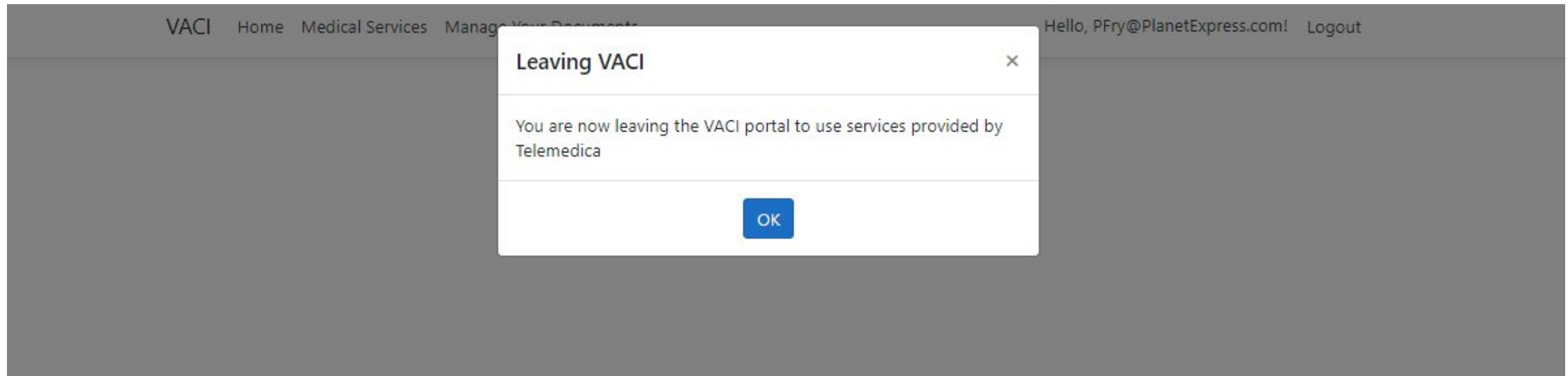
Reset

Once you click on the link, you will be asked to create/reset your password.

Vet will use their email as the username



1. View above is the Home Screen the Vet will come to after signing in
2. Vet should click “Medical Services” at top of page and that will route them to Telemedica, LLC services



1. Once a Vet selects the “Medical Services” Tab, they will find a disclaimer letting them know that this portion of the portal is controlled by Telemedica, LLC NOT VACI
2. The Vet will not be able to proceed without confirming notification.





**1. The first step prior to signing up for any medical services is having the Veteran complete a Consent form. Once this is complete, the ability to complete an intake form for the different available services will appear.**

Consent Form

Please complete your Consent Form

Complete Consent Form

**4. After booking any appointment, when the Veteran logs in, all appointments will appear here with corresponding information.**

Upcoming Appointment(s)

No Appointments Scheduled

**3. Here they will find pertinent contact information for help: VC contact information & Telemedica Customer Service email**

Need Help? Get In Touch with your VC

**Veteran Coach Contact Information**

Zapp Branigan

1231231233

ZBranigan@PlanetExpress.com

**2. Required medical records and other supporting documentation to have an appointment and create a claim should be uploaded here (drag and drop).**

Need to Upload Documents?

**Document Upload**

Drop your documents here to upload them!

you miss your FIRST appointment, there is a \$50 rescheduling fee. If you miss your SECOND appointment, there is a \$100 rescheduling fee. If you miss your THIRD appointment, you will NOT be allowed to schedule a THIRD time. To complete my evaluation, I need your medical records (military medical records, VA medical records, and non-VA medical records). Ask your Veteran Coach at VA Claims Insider if you need assistance. My signature and signature below that I have given the doctors ALL records of relevant medical health records from VA and non-VA sources. These records have been placed in a HIPAA compliant cloud storage folder. If you have questions, please contact your Veteran Coach. I will not do the video-teleconference interview until I receive your military medical/psychological records, the retainer fee, and this signed consent form.

Full Name

Kelcey Culpepper

Today's Date

09/08/2020


Signature

Kelcey Culpepper


Save

Submit

**1. Sample: Excerpt of Consent form Submission**

Once a vet completes their consent form, they will receive access to the Telemedica Intake forms 

NexusBuddy Home Medical Services Manage Your Documents Hello, PFry@PlanetExpress.com! Logout



Click the "?" to receive additional information on the different services.

**I need a first time Diagnosis of a Medical Condition**

Telemedicine examination to determine first-time medical diagnosis of 17 applicable conditions and provide a nexus statement for veteran client. For more information, please click on the tool tips icon (30-minute video teleconference exam)

[Click Here](#)

**Diagnosis Process**

**I need a Mental Health Exam**

Independent Psych Evaluation (1-hour video teleconference exam)

[Click Here](#)

**Psych Process**

Upcoming Appointment(s)

No Appointments Scheduled

**I need a Nexus Letter for a Pre-Existing Condition**

Independent Medical Opinions (nexus letters) based on previously diagnosed condition related to:

- Primary service connections
- Secondary service connections
- Presumptive service connections

[Click Here](#)

**Independent Medical Opinions (Nexus Letters) for pre-existing conditions**

Need Help? Get In Touch with your VC

**Veteran Coach Contact Information**

Kif Kroker  
1231231233  
KKroker@PlanetExpress.com

Need to Upload Documents?

**Document Upload**

Drop your documents here to upload them!

VACI Home Medical Services Manage Your Documents Hello, Tuelia@PlanetExpress.com! Logout

## Intake for Medical Exam & Diagnosis from an MD for an Independent Medical Opinion (IMO)

To more quickly process your Independent Medical Opinion (IMO) from our Medical Doctor (MD), Dr. John Hamilton, please fill out the information below to the best of your ability. In certain circumstances, the Doctor may have questions and will contact you directly. The Doctor may provide a Medical Diagnosis and a completed IMO based upon the documentation you have in your records and/or the result(s) of a Virtual Medical Examination with you. \*The doctors are 100% independent in their review and evaluation. They do NOT work for VA Claims Insider. They work for themselves. We've done it this way to avoid any perceived or actual conflict of interest regarding your VA disability claim. Because you are a VA Claims Insider Elite or Mastery member, you get discounted access to the doctor. A full price list with quantity discounts is listed at the end of this intake form PRIOR to submission. Thank you! Best, VA Claims Insider.

First Name

Last Name

Email Address

Phone Number

SSN

Veteran Coach assigned to your case:

Date you entered active duty

Date you left active duty

Branch of service

Are you currently taking any medication?  
 Yes  
 No

If so, please list:

Are all your medical records (service treatment medical records, VA medical records, and/or private medical records uploaded to your cloud storage folder? (If "No," you will NOT be allowed to proceed until the medical records have been uploaded. The medical team will NOT review your file until your medical records have been uploaded to your cloud document storage folder). Please email CustomerService@teledify.com if you need help.  
 Yes  
 No

Example of Intake Form

1. The Vet will access the intake form, complete (every field) and hit submit.
  2. Once the intake form is complete- a copy of it will be uploaded to the vet's documents automatically - "Manage Your Documents"
  3. The Vet will be routed to book appointment upon hitting submit, as required.
- \*See slides detailing document functionality on the previous slides
4. If the Vet needs to make any changes, the Intake form will be "unlocked" for 48 hours.
  5. After 48 hours, the form is "locked" and any additional changes will need to be requested through Telemedica Customer Service.

VACI Home Medical Services Manage Your Documents Hello, PFry@PlanetExpress.com! Logout

File Name	Uploaded	
PTSD Evaluation and IMO DSM5 - Double Signature Fillable Form - Digital ....pdf	9/11/2020 8:46:05 PM	<input type="button" value="Delete File"/>
fry.txt	9/11/2020 8:46:47 PM	<input type="button" value="Delete File"/>
slim - Copy.txt	9/11/2020 8:46:05 PM	<input type="button" value="Delete File"/>
slim.txt	9/11/2020 8:46:04 PM	<input type="button" value="Delete File"/>



**I need a first time Diagnosis of a Medical Condition**  
Telemedicine examination to determine first-time medical diagnosis of 17 applicable conditions and provide a nexus statement for veteran client. For more information, please click on the tool tips icon (30-minute video teleconference exam)

**I need a Mental Health Exam**  
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**I need a Nexus Letter for a Pre-Existing Condition**  
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-Primary service connections  
-Secondary service connections  
-Presumptive service connections

Upcoming Appointment(s)  
No Appointments Scheduled

Need Help? Get in Touch with your VC

**Veteran Coach Contact Information**  
Kif Kroker  
1231231233  
KKroker@PlanetExpress.com

Need to Upload Documents?

**Document Upload**  
Drop your documents here to upload them!

1. To access any records, click on the “Manage Your Documents” tab at the top (see arrow pointing to tab above)

2. Below is the view once “Manage Your Documents” tab is selected.

Documents can be:

- Opened
- Downloaded
- Deleted

All deletion is a “soft deletion” meaning we can re-establish any document that has been accidentally deleted by the Veteran.



VACI Home Medical Services **Manage Your Documents** Hello, PFry@PlanetExpress.com! Logout

File Name	Uploaded	
PTSD Evaluation and IMO DSM5 - Double Signature Fillable Form - Digital ....pdf	9/11/2020 8:46:05 PM	Delete File
fry.txt	9/11/2020 8:46:47 PM	Delete File
slim - Copy.txt	9/11/2020 8:46:05 PM	Delete File
slim.txt	9/11/2020 8:46:04 PM	Delete File



## PTSD Evaluation and Independent Medical Opinion

Patient / Veteran Last Name		First Name
<input type="text"/>		<input type="text"/>
Phone #	Date of Birth	Social Security Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

\*\*\*\*\*  
If the Veteran experiences a mental health emergency during the interview, please terminate the interview and obtain help, using local resources as appropriate. You may also contact the Veterans Crisis Line at 1-800-273-TALK (8255). Stay on the Crisis Line until help can link the Veteran to emergency care.  
\*\*\*\*\*

### 1. Diagnostic Summary

This section was completed based on the current examination and clinical findings that conforms to DSM-5 criteria.

Has the patient ever been diagnosed with PTSD?  Yes  No

### 2. Current Diagnoses

Diagnosis #1:

ICD Code:

Comments, If Any

Diagnosis #2:

ICD Code:

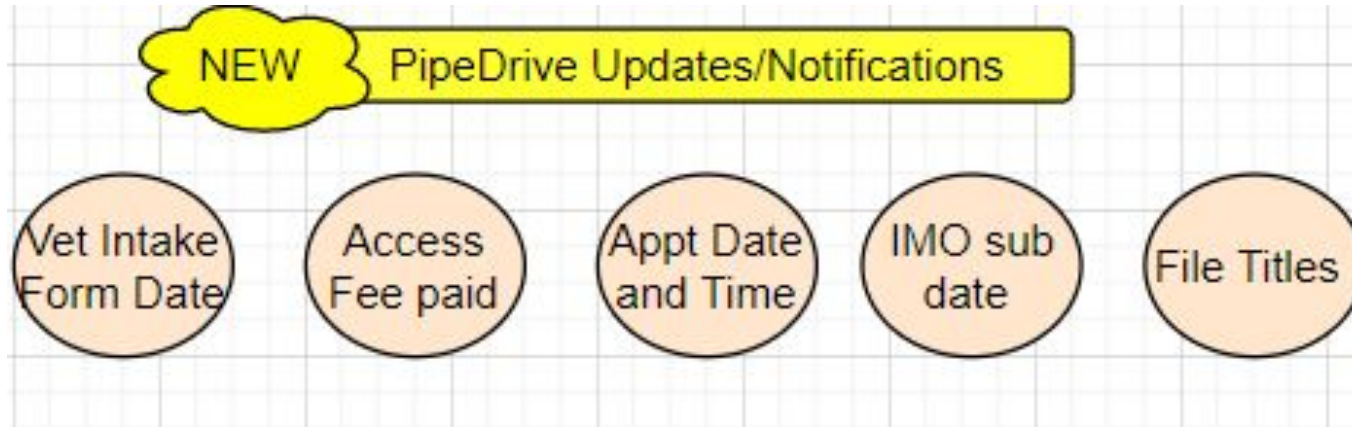
Comments, If Any

They can save to computer to send out, print or pin it to their search bar.

Works on Mobile, as well.

Vet can open all uploaded documents into a separate tab by clicking on the document

# Current Changes for VMC/VC



## New Pipedrive Fields

1. Intake Form Submission Timestamp
2. Access Fee paid
3. Appointment Date and Time
4. IMO Submission Timestamp
5. File Titles uploaded by Vet (into notes section)

**\*\*\*You will also receive email notification with each update to the correspondent field**

## Screenshot from Pipedrive

Note:  
We are building out the VMC/VC side of the portal to be able to access the assigned vet's documents. ETA coming soon

A screenshot of a Pipedrive interface showing a list of fields and their values. Red arrows point to specific fields: "Psych Eval Date", "Med Eval Submission Date", "Finance | Last Payment Date", "Medical Access Fee Paid", "Psych IMO Uploaded Date", "Medical IMO Uploaded Date", and "Diagnosis IMO Uploaded Date".

Psych Eval Date	Sep 18, 2020
Psych Intake Completed	
Strategy Session   Medical Eval Required?	
Med Eval Submission Date	Sep 18, 2020
Strategy Session   Diagnosis Needed?	
Have Medical Records Been Uploaded?	
C&P Coaching Call Date	
C&P Exam Date	
Has Veteran had their C&P Exam?	
Has Claim Been Submitted?	
Date Claim Submitted	
Finance   Next Payment Amount	
Finance   Last Payment Date	Sep 16, 2020
Finance   Last Payment Amount	
Finance   Total Amount collected from Veteran	
Finance   Monthly Payment Amount	
Finance   COVID-19 Promo   Vet Owes \$495	
Finance   Payment Plan Type	
Finance   Next Payment Date	
Finance   Currently in Collections?	
Medical Access Fee Paid	<input type="checkbox"/> Yes
Psych IMO Uploaded Date	Sep 16, 2020
Medical IMO Uploaded Date	Sep 16, 2020
Diagnosis IMO Uploaded Date	Sep 16, 2020

# Contact Page

## **IT Issues**

Please contact: [devops@VAclaimsinsider.com](mailto:devops@VAclaimsinsider.com)

## **Issues with IMO**

Please contact Telemedica Customer Service:  
[customerservice@telemedify.com](mailto:customerservice@telemedify.com)



# FAQ

- *What do vets do if they forgot their password*

**A. On the login page there is a “forgot your password” link**

- *What if a vet has issues submitting their form*

**A. Please contact the Telemedica Customer team at the email provided in the help center on the vet’s Medical Service Tab**

# FAQ continued

- *What if a vet does not receive a credential email*

**A. This means somewhere in the PipeDrive process, the 'DEAL' skipped over the 'Strategy Session Follow-Up' stage in Pipedrive. Simply place the vet back in the 'Strategy Session Follow-Up' Stage in Pipedrive, and it will automatically generate a credential email and send it to the vet. Contact the DevOps teams for any assistance: [devops@VAClaimsinsider.com](mailto:devops@VAClaimsinsider.com)**

- *What if a vet needs to show a VMC/VC their documents they uploaded*

**A. VC/VMC portals will be available to enable viewing of your assigned Veterans in 1-2 weeks. In the Interim, if you need to see a file, please coordinate a zoom call. Do NOT send any sensitive documents via email.**