

DOCUMENT DELIVERY FORM

CONTRACTOR Northrop Grumman
CLIENT/AGENCY: Department of Veterans Affairs
PROJECT NAME: Blue Button Authentication Field Test
Contract NUMBER: VA118-12-C-0057

DELIVERABLE(S):

Item Description	QTY	Date Delivered
<i>Training Materials (Participants)</i> (CLIN 0008) Document ID: VA11812C0057_CLIN0008_1.0	1 (electronic)	11/16/2012

CONTRACTOR CERTIFICATION:

Deliverables were prepared and submitted by Northrop Grumman

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Document ID #: **VA11812C0057_CLIN0008_1.0**

Blue Button Authentication Field Test

Contract No.: VA118-12-C-0057

16 November 2012

RELEASE AUTHORIZATION

This *Training Materials (Participants)* document has been developed by Northrop Grumman under Contract No. VA118-12-C-0057 and is approved for release.

RECORD OF REVIEW AND HISTORY

Date	Version	Comments	Author
16 Nov 2012	1.0	CLIN0008 Scheduled Delivery	Northrop Grumman VA BB Authentication Team

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1.0 INTRODUCTION TO THIS COURSE

This document contains the training material to be used by the participants of the Department of Veterans Affairs (VA) Blue Button (BB) Authentication Prototype. By the end of this training, the learner will be able to complete the identity proofing process. This course is made up of two modules with corresponding objectives:

Module 1: Introduction to the VA BB Authentication System

At the end of this module, the learner will be able to:

- Identify the purpose of online identity proofing.
- Identify the benefits of online identity proofing.

Module 2: Participants

At the end of this module, the learner will be able to:

- Identify documents that may be useful during the identity proofing process.
- Describe the steps necessary to accomplish the identity proofing process.
- Identify the criteria for passing.
- Identify the criteria for failing to include the consequences.
- List the steps required for identity proofing if the online process fails.

The step-by-step instructions in Module 2 will be included as a link on the actual web page for quick viewing by any user. For the purpose of this document, users are encouraged to read the document from beginning to end. These steps can be used while going through the identity proofing process. Be careful, though, because there is a 5 minute time limit when answering the questions.

2.0 MODULE 1: INTRODUCTION TO THE ONLINE IDENTITY PROOFING SYSTEM

The first module in this course talks about why this website was created. In September 2010, the VA created a way for Veteran's to view their VA medical information. With access to this information, you can share your health data with people who need the information. This could be your family or other physicians.

The My Healthe Vet (MHV) website is how you get to your medical information. It is a secure patient portal that requires an account. Once you receive a basic account, you need to upgrade your account in order to view your health information. Right now, this is done by proving your identity in person at your nearest VA facility and completing a Release of Information (ROI) form (VA Form 10-5345a). For a lot of Veterans, this is difficult to do.

2.1 Purpose of the Online Identity Proofing System

This project created a way for Veterans to prove their identity online, without having to go to a VA facility. When you are ready to upgrade your basic MHV account, you will be asked to complete the online identity proofing process. You can do this from your home computer. When you complete that process, just print the ROI form, sign it, and put it in the mail.

There are two steps in the online identity proofing process. First, you have to prove your identity. Then, you need to answer three questions to prove you are who you say you are! The questions will be ones that only you should know the answers. The process is done when you answer the questions correctly. If you cannot answer the questions correctly, you will have to prove your identity in person at the nearest VA facility. We will have more information about that as you go through the course.

2.2 Benefits of the Online Identity Proofing System

There are a number of benefits when successfully completing the online identity proofing process. One important benefit is that you will not have to travel to a VA facility to prove your identity. You can upgrade your account without leaving your home.

The VA will also benefit by having fewer in-person registrations. This means the VA staff will have more time to help those that need to register in person.

3.0 MODULE 2: PARTICIPANTS

3.1 Documents that may be Useful During the Verification and Authentication Process

During the process, you will be asked to provide some basic personal information. You will also be asked questions. These questions can be about your past homes, cars, or phone numbers. Most people have no trouble answering these questions. If you feel you need additional references, you may want to gather some of the documents listed below.

- Birth Certificate
- Social Security Card
- Driver's License
- Address Book, for relatives and roommates with whom you may have shared a home
- Diplomas and Certificates
- Current and previous residence/ownership information
- Current and previous vehicle registration information.

3.2 Steps Necessary to Accomplish the Verification and Authentication Process

Once on the **Getting Started** page (Figure 3-1), carefully read all of the information presented. When you have finished, click on the **Continue** button. You will then be presented with the **Tell Us About Yourself** page.



Figure 3-1. Getting Started Page

3.2.1 Tell Us About Yourself Page Step-by-Step

On this screen, you will type in some basic information. If you need more information about a field, click the 'i' next to the field.

1. Enter your first name. It should be the same as what is on your Social Security card, driver's license, or other government issued ID.
2. Enter your last name. It should also be the same as what is on your Social Security card, driver's license, or other government issued ID. If you have a hyphen in your name, do not include the hyphen.
3. Enter your current street address. It should be the same as what is on your driver's license or other government issued ID.
4. Enter your current city. It should be the same as what is on your driver's license or other government issued ID.
5. Next, select your current state from the drop-down menu. It should be the same as what is on your driver's license or other government issued ID.
6. Enter your current zip code. It should be the same as what is on your driver's license or other government issued ID.

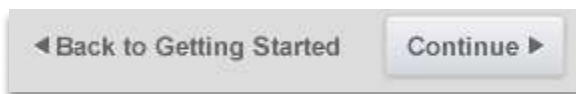
The screenshot shows a form titled "Your First Name" with a text input field labeled "First Name" and an information icon (i). Below it is a field for "Your Last Name" with a text input labeled "Last Name" and an information icon. The "Street Address" section has a text input labeled "House Number and Street" with an information icon. The "City" section has a text input labeled "City of Residence" with an information icon. The "State" section has a dropdown menu labeled "Select..." with an information icon. The "Zip / Postal Code" section has a text input labeled "Zip / Postal Code" with an information icon.

The next series of fields includes typing in your birthdate and your social security number. As you type in the information, the system will mask the individual numbers for privacy.

7. Enter your social security number. Only use numbers, no dashes.
8. Re-enter your social security number. Only use numbers, no dashes.
9. For your date of birth, use the up or down arrow to select your month, day and year.

The screenshot shows a form section titled "Social Security Number" with a text input field labeled "Social Security Number" and an information icon (i). Below the input is the instruction "Do not use dashes or other separators". The next section is "Re-Enter Your Social Security" with another text input labeled "Social Security Number" and an information icon, followed by the same instruction. The "Date of Birth" section has three dropdown menus labeled "Month...", "Day...", and "Year..." with information icons.

10. When you have finished filling out all of the information, click on the **Continue** button at the bottom of the page, or select **Back to Getting Started** to return to the home page.



3.2.2 Failed Verification Page

You will have three tries to enter your personal information. At this time you will need to visit your nearest VA Office to register for access to your medical record. A link to the **VA Office** locator is supplied on this page to help you find the nearest facility.

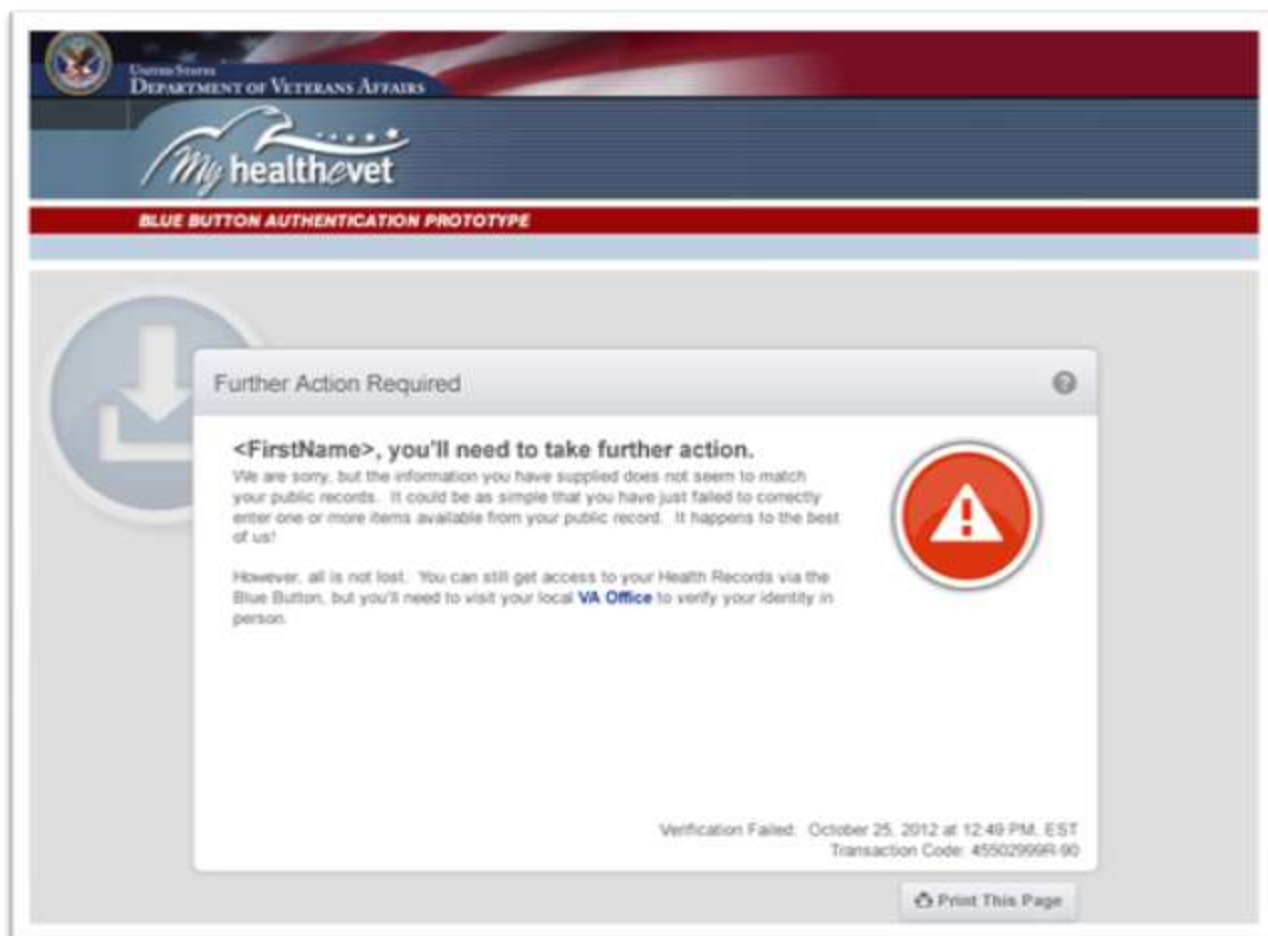


Figure 3-2. Failed Verification Page

3.2.3 Answer a Few Questions Page

Once your information has been submitted and verified, you will be asked to answer three questions (Figure 3-3). These questions will ask for information that only you should know. An answer is required for each question. The questions in this example are representative of the

questions on the actual page. When you have finished answering all of the questions, click on the **Continue** button at the bottom of the page.

The screenshot shows the 'My healthvet' interface for the 'BLUE BUTTON AUTHENTICATION PROTOTYPE'. At the top, the United States Department of Veterans Affairs logo is visible. Below the header, a progress bar indicates three steps: '1 Tell Us About You...', '2 Answer Questions...' (the current step), and '3 Find Out Your Results...'. The main content area is titled 'Answer a Few Questions' and includes a message: 'Thanks <FirstName>! Now that we know who you are, we need to ask some questions to verify your identity. This step is done to make sure that your Health Records are made available to you and no one else. Please select one answer from each question and press Continue. Once submitted, we will guide you as to the next step in the process.' There are three questions with radio button options:

- 1) What color was your 1989 Honda CRX?
 - ☐ Silver
 - ☐ Red
 - ☐ Blue
 - ☐ Yellow
- 2) What was the name of the High School from which you graduated?
 - ☐ Sullivan High School
 - ☐ Effingham High School
 - ☐ Greater Atlanta Christian
 - ☐ Westchester Academy
- 3) In which city below did you own a house in 2005?
 - ☐ Green Bay, WI
 - ☐ Suwanee, GA
 - ☐ Morristown, NJ
 - ☐ Santa Monica, CA

A 'Continue' button with a right-pointing arrow is located at the bottom right of the form.

Figure 3-3. Answer a Few Questions Page

You will have five minutes to complete this page and click on **Continue**. If four minutes have passed since this page was first presented to you, you will be given a timeout warning, as shown in Figure 3-4, Timeout Warning. The warning will automatically fade away after ten seconds. It will not interfere with your answering the questions.

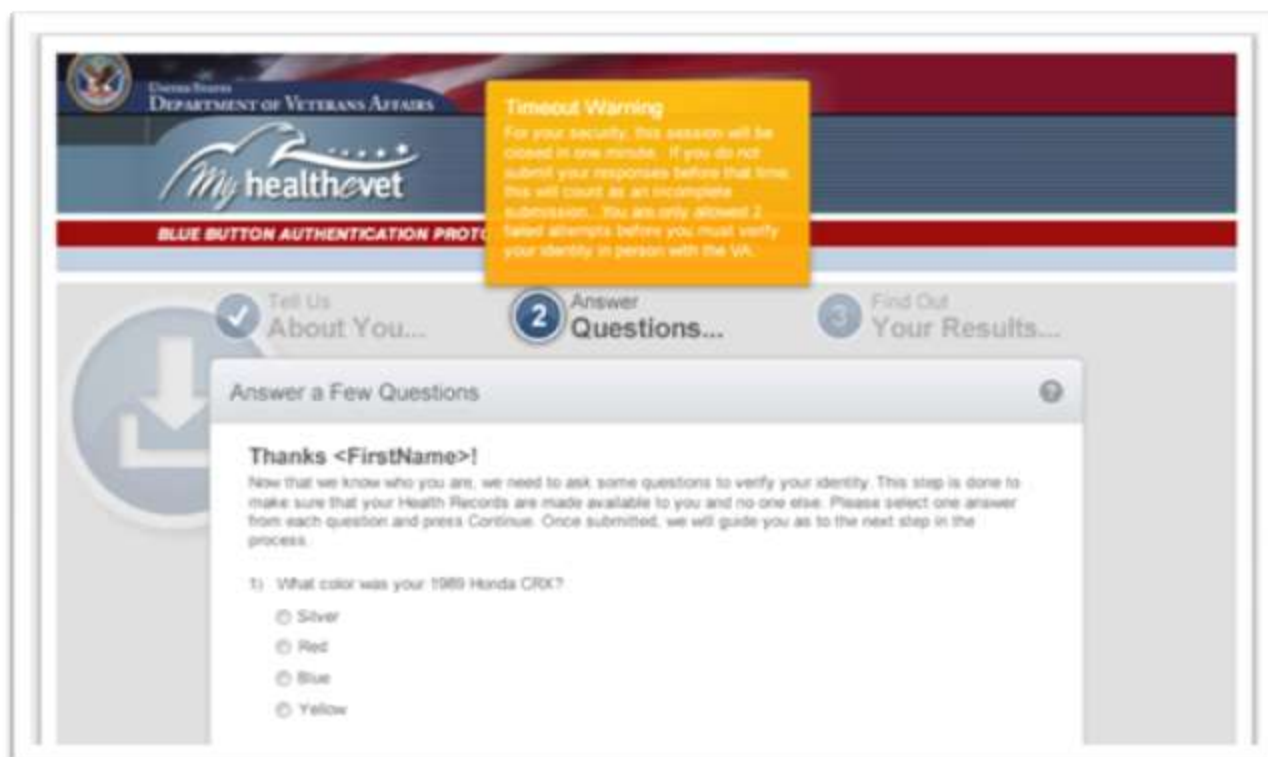


Figure 3-4. Timeout Warning

3.2.4 Congratulations Page

If all the questions are answered correctly, you successfully proved your identity, as seen in Figure 3-5. The final step in the identity proofing process is to complete the ROI form. This form lets the VA know that you want access to your medical record and that you are authorizing the release of this information. Click the blue link on the page to open the document. This form must be printed, filled out and then mailed to your nearest VA Facility. A link to the Facility Locator is also available from this page to help you find the mailing information for the closest facility.



Figure 3-5. Congratulations Page

3.2.5 Problem Page

If you do not get all of the questions correct on your first try, you will be able to take one more quiz. Figure 3-6, Problem Page (1), provides instructions on what to do next. You can either take the quiz again immediately or you can try again at a later time. If you choose to try again later, you will have to go through the verification step again.

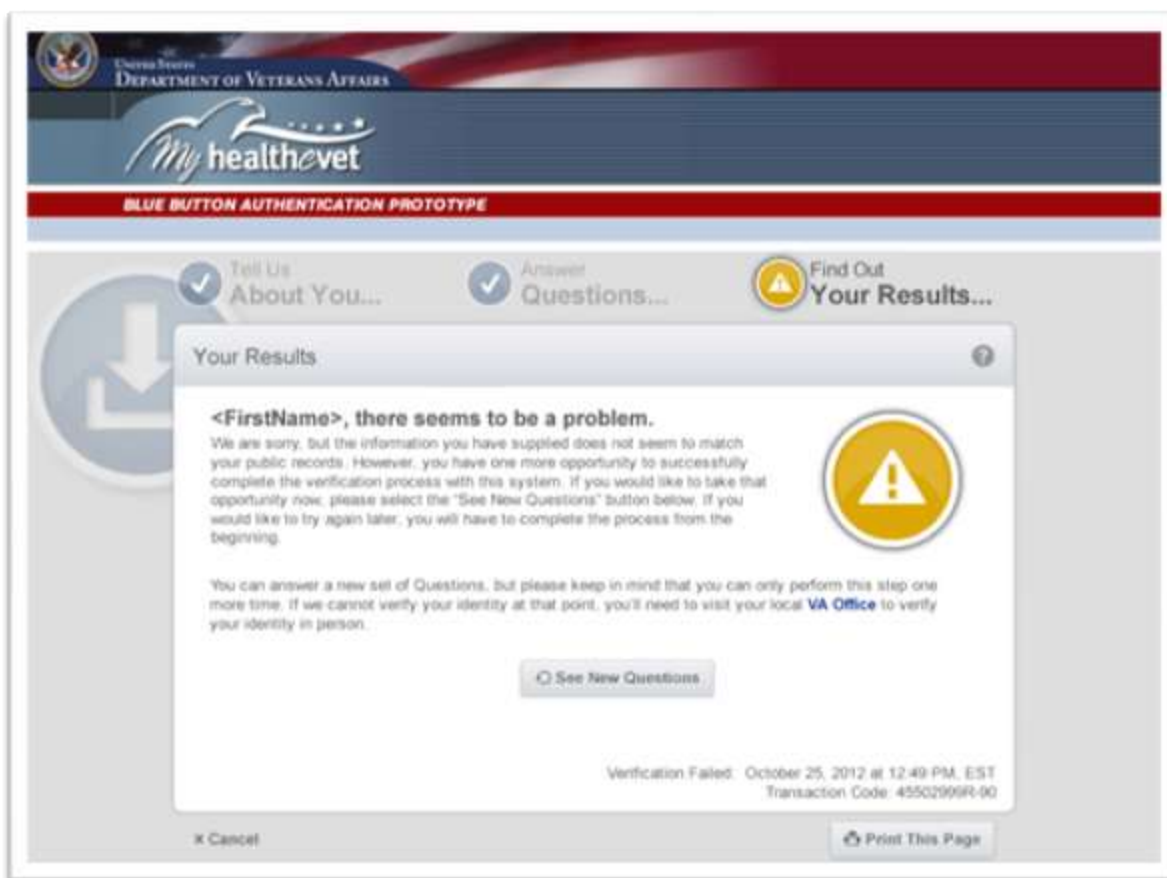


Figure 3-6. Problem Page (1)

You will be given two tries to correctly answer all of the questions. If after the second try all of the questions are not answered correctly, Figure 3-7, Problem Page (2), will be displayed. Since the online identity proofing process could not be completed successfully, you need to visit your nearest VA Office to prove your identity in-person. A link to the **VA Office** locator is supplied on this page to help you find the nearest facility.



Figure 3-7. Problem Page (2)

3.3 Passing Criteria

To pass, you must successfully complete two steps. First you must supply your personal information correctly. Then you must correctly answer all of the questions that are posed to you within the five minute time limit. Once you have successfully completed the process, you'll be shown the **Congratulations Page**.

3.4 Failing Criteria

The online identity proofing process cannot be completed if you are unable to supply the correct personal information or answer all of the questions correctly. You have 3 tries to enter your basic information correctly. You then have two tries to answer the questions correctly. A screen will be displayed, depending on which part of the process failed, that will instruct you on what needs to be done next for you to complete the identity proofing process.

3.5 Required Steps if Process Fails

If you are unable to complete the online identity proofing process, you can still do in-person identity proofing. You will need to visit your nearest VA Office to complete this step and to

complete the ROI form. A link to the **VA Office** locator is supplied on this page to help you find the nearest facility.

4.0 SUMMARY

Congratulations! You have completed the course for the VA BB Authentication System Participant training!

In this course you have learned how to:

Module 1: Introduction to the VA BB Authentication System

- 1.1 Identify the purpose of online Verification and Authentication.
- 1.2 Identify the benefits of Verification and Authentication.

Module 2: Participants

- 2.1 Identify documents that may be useful during the Verification and Authentication process.
- 2.2 Describe the steps necessary to accomplish the Verification and Authentication process.
- 2.3 Identify the criteria for passing.
- 2.4 Identify the criteria for failing to include the consequences.
- 2.5 List the steps required for Authentication if the online process fails.

You should be able to use the online identity proofing process to gain access to your medical records. Having access will allow you to share this information with other doctors and healthcare providers outside of the VA. This could be very important in case of an emergency, where this information can help guide the treatment you receive.

Thank you for participating in this training!