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Ominous Voice: The National Training Team - Processing Presents

Note: Please see corresponding Policy Advisories for reference.

See page 26 for list of Points to Ponder.

See page 24 for list of references.

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Ominous Voice: A Coffee Shop Discussion Series: DGI Automation & Expectations

Narrator (Juliana): Hello and welcome to our discussion today covering a few topics including automation of original claims and how the system reads and reacts to certain VADIR information. We will also discuss a few recent procedural advisories and the information provided within each advisory. We hope this information will be helpful, insightful, and useful in your daily processing. Let's get right into today's discussion.

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Today's topics include:

- Generic COEs
- Jurisdiction
- VIS Capture & Review
- Exclusions
- Relinquishments

The slide features a background image of two women, one with long blonde hair and one with dark hair, both smiling and holding coffee cups in a cafe setting. The text is overlaid on the left side of the image.

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Narrator (Juliana): In today's discussion, topics will include Generic COEs, Jurisdiction, VIS Capture & Review, Excluded Service and Relinquishments in DGI. Now, let's join Angela and Giovanna.

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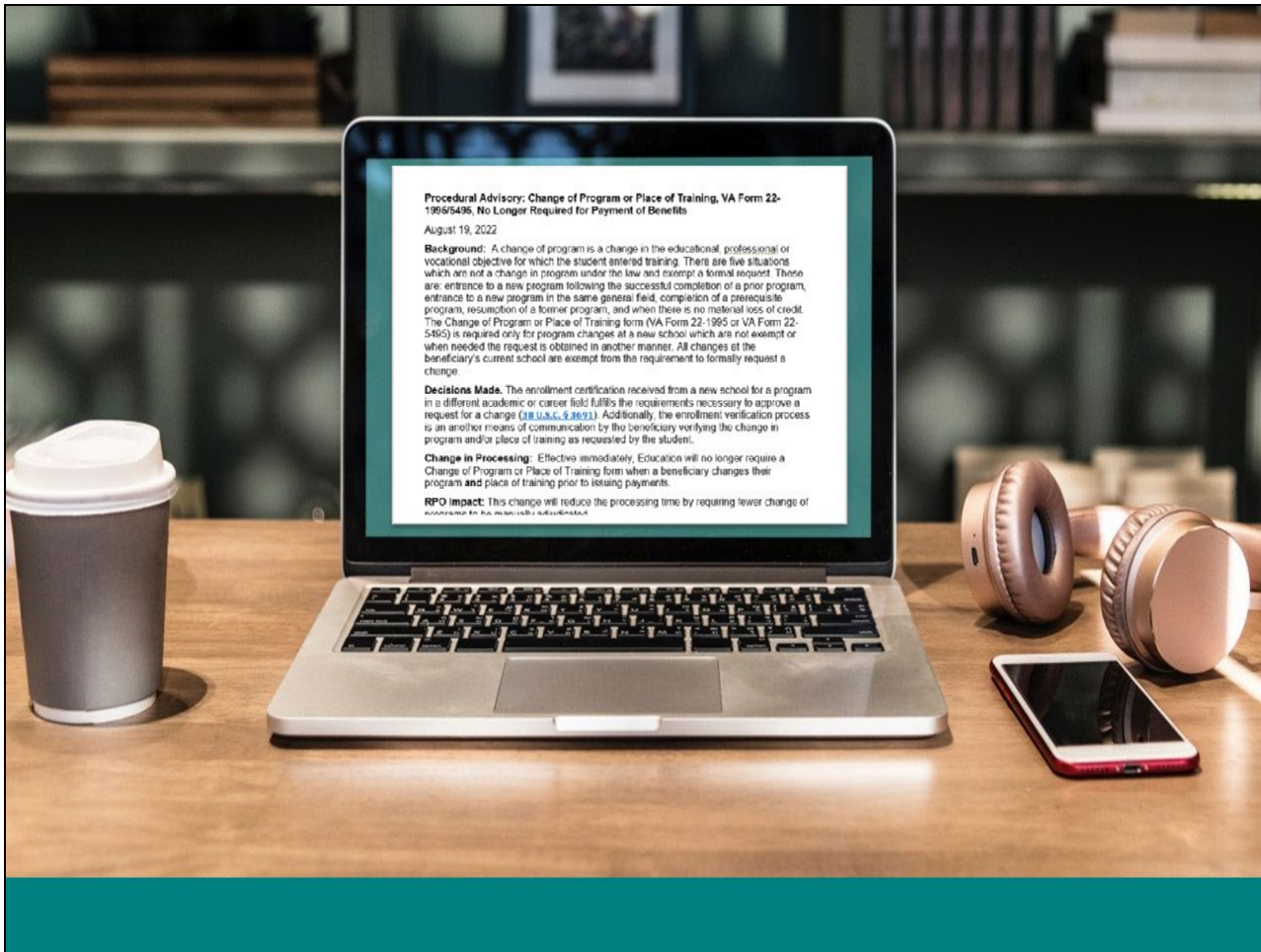
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Angela: Hey, Giovanna.

Giovanna: Hi, Angela. I'm looking forward to our coffee break discussion today. I think we have some interesting things to talk about which will interest VCE's very much. And I think they'll find it helpful in their daily grind. What are we going to discuss first?

Angela: Well Gio, I thought we might talk about this procedural advisory, which came out in August 2022. Do you remember? I brought my laptop so we could look at it. Here it is.

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Giovanna: Oh, yeah. The one about the VA Form 22-1995 or the 5495 for Chapter 35. This is the advisory which eliminated the requirement of the change request form, in order to pay benefits to someone, if they change their program and school. With this change, a VCE no longer has to worry about developing for the 1995 or 5495. We can just accept the enrollment information, check for approval, and move on with our lives. This was a great change, I think. What did you think?

Angela: I thought it was a great change, too. It'll speed up processing since VCE's no longer have to develop. And, did you notice the information about sending a Generic COE? This will also save time and energy when filling out letters, since we won't have to adjust for specific school and program anymore. Of course, if the beneficiary requests a specific COE, we'll still send one, but the majority of the time, no extra effort is needed. I think it's important to remember that this didn't change the requirement to check for the approval of school and program. A VCE still has to check and capture their evidence to back up their decision letter and if a school or program aren't approved, a bad course COE is still required.

Giovanna: Yes. We have to tell them if their school or program isn't approved and provide them with the next steps to get approval, which is included in the Bad Course COE. But, if approved, the Generic COE is the way to go and should save some time. But the biggest time saver affected by this change is the elimination of the 1995/5495 requirement when a student changes program and school. This isn't something a VCE will need to worry about any longer. I think it's great!

Angela: I do, too! And did you see the part about elections for when to begin a new program and end the old program can be taken in any manner, including over the phone? So, when someone does decide to change programs, and they overlap, the VCE will be able to take the election over the phone whenever possible. They can also take it by mail or e-mail. Those still work, too.

Giovanna: I'm glad they included this information. Also, I think it's interesting to point out, there was mention of the scenario of working an enrollment and an application or a 1995 or a 5495 at the same time. It reminded me of the times I ran into this scenario and wasn't sure if I was required to send out the Certificate of Eligibility in addition to the Award Letter. I'm glad they clarified this for us and let us know it's not required to send the COE.

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Point to Ponder: WEAMS capture is required for each new school, but not for each program change, receipt of an enrollment at an extension campus nor with each supplemental claim.

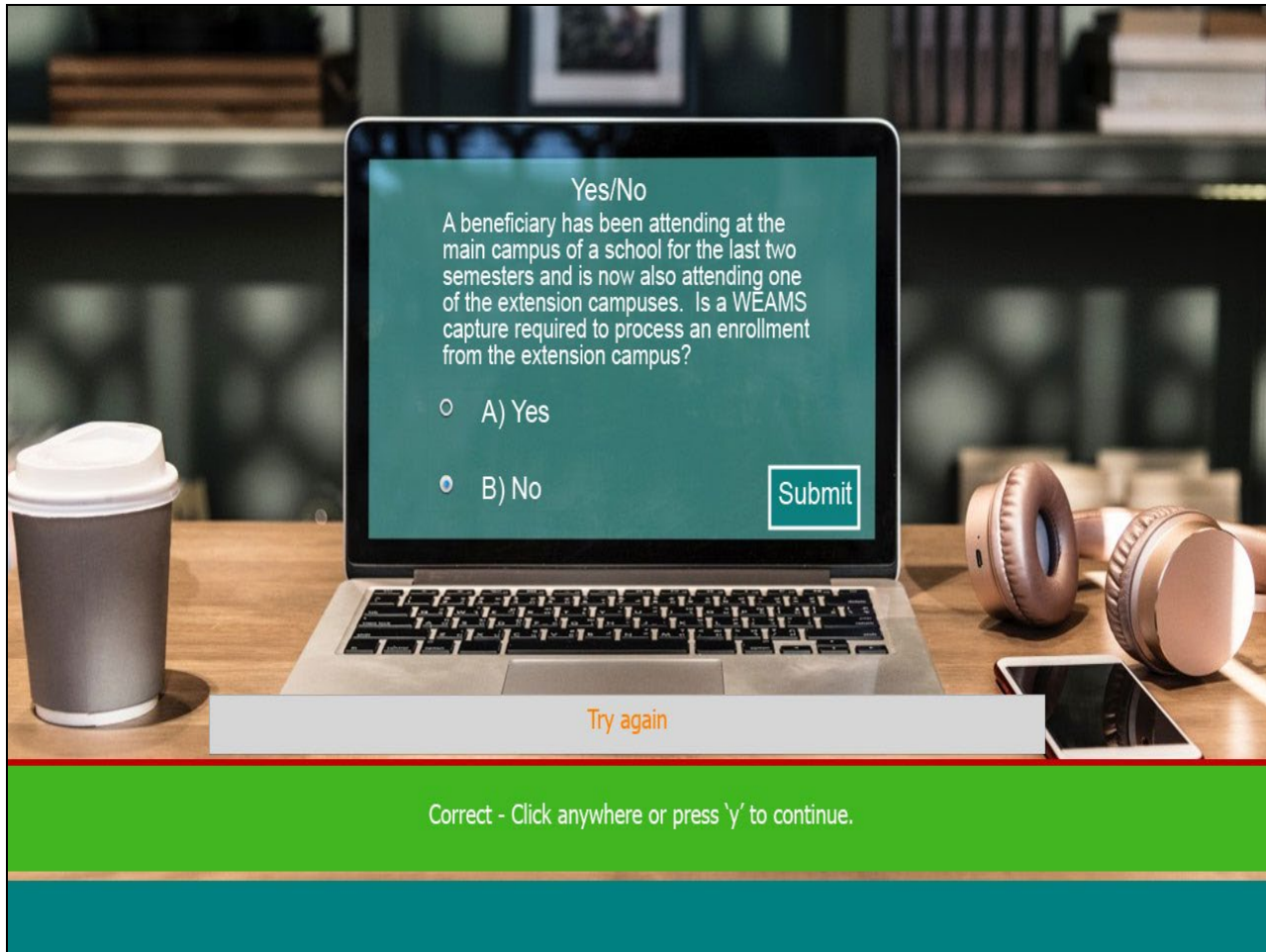
Point to Ponder: An election may be required for overlapping programs when switching from one to another. This begin / end date election may be obtained by phone, mail or electronically.

Point to Ponder: If processing an enrollment certification and a VA Form 22-1995 or 5495, it is not required to send a COE. The award letter will suffice. Use the earliest claim date.

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Narrator (Juliana): During their discussion, Angela and Gio discussed several points to ponder. Let's review before moving to the next topic. WEAMS capture is required for each new school, but not for each program change, receipt of an enrollment at an extension campus, nor with each supplemental claim. An election may be required of when to begin and end programs which overlap during the switch from one program to another. This election may be obtained in any manner including phone, mail, or electronically. If processing an enrollment certification and a VA Form 22-1995 or 5495, it is not required to send a COE. The award letter will suffice. However, remember to use the earliest claim date for the award action. These were interesting points of consideration. Now, let's rejoin Angela and Giovanna.

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Ominous Voice: It's time for a knowledge check.

Yes or No.

A beneficiary has been attending at the main campus of a school for the last two semesters and is now also attending one of the extension campuses.

Is a WEAMS capture required to process an enrollment from the extension campus?

When you have your answer, click 'Submit'.

The correct answer is No.

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Angela: Okay, so let's talk about this jurisdiction issue we've been seeing with automation of the first Original chapter 33 claims, which is very cool by the way. I think it's pretty exciting to be part of this modernization effort and it's exciting to see some progress. Now, as we all know, with progress comes change and this change we are about to talk about is another result of modernization efforts.

Giovanna: Tell me more, I'm not sure I'm fully aware of this issue. So, what's happening?

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Procedural Advisory: Partially Automated MEB 1990G Jurisdiction Processing Guidance
November 7, 2022

Background: The My Education Benefits (MEB) application service is currently available for Veterans and service members who apply for the Post-9/11 GI Bill (Chapter 33) only based on their own service. While interfacing with an applicant, MEB will attempt to fully automate original claims with real-time decisions. Applications which fail to automate will be processed manually, as they are now, with a few enhancements to include the full and complete ingestion of all qualifying service from VA-DoD Identity Repository (VADIR). Information collected is sent to The Image Management System (TIMS) on a VA Form 22-1990 and is currently identified as a "1990G" TIMS document for claims processing. **NOTE: Information regarding potential school or training facility is not collected on these applications; therefore, the Regional Processing Office (RPO) with jurisdiction over the beneficiary's place of residence will have jurisdiction over the claim.**

Issue: The MEB defines jurisdiction based on the state code located in VADIR which may not be current. The application must be reviewed for the current address and the jurisdiction should be based on the address on the application.

RPO Impact: MEB jurisdiction rules have led to partially automated claims being mis-routed. MEB is currently routing the 1990G to the RPO based on the VADIR address, not the address provided on the 1990G. For example:

- Address on 1990G is in RPO 307 jurisdiction
- VADIR address is in RPO 351 jurisdiction

The application should be reviewed for the current address and the jurisdiction should be based on the beneficiary's address.

Upstream Action Needed: Program Support Assistants (PSAs) will continue to follow guidance outlined in M22-4, Part 3, Chapter 14.29 if there is an active folder at another RPO and Chapter 14.21 regarding creating a record in TIMS.

Veteran Claims Examiner (VCE) Action Needed: The VCE will review the claim and determine if the 1990G was mis-routed. If the 1990G was NOT routed to the correct RPO, VCE will take the following action based upon pending claim status:

- **No other pending claim at another RPO:** The VCE will review the claim and process the corresponding Certificate of Eligibility (COE)/Denial. Once complete, follow local file transfer request procedures for the folder to be sent to the correct RPO.
- **Claim pending at another RPO:** The VCE will take no action on the 1990G and follow local file transfer request procedures for the folder to be sent to the correct RPO.

Point to Ponder: No other pending claim at another RPO: The VCE will review the claim and process the corresponding Certificate of Eligibility (COE)/Denial. Once complete, follow local file transfer request procedures for the folder to be sent to the correct RPO.

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Angela: It seems the information in VADIR decides where a claim will be forwarded. Since the information's not always current and won't always match the address listed on the application, some claims are being sent to the wrong Regional Processing Office at times.

Giovanna: Oh, wow! How are we to know which office should have the claim?

Angela: Well, this is the question being answered by this Procedural Advisory. Have you seen it?

Giovanna: Yeah. I've heard of this one before. How should a VCE handle this situation, when they have received a 1990G, which has been routed to the RPO based on the address in VADIR. But I probably should review it again.

Angela: Hey, no problem! I can give you a summarized version. So, if there's a pending claim, in the office of jurisdiction, the VCE should just transfer the claim to the other office. But if there's no claim pending at the other RPO, the VCE should just work the claim and then have the claim sent to the RPO of jurisdiction based on the application address. This will allow the claim to be worked without delay. You know the Upstream division has been directed to establish the End Product (EP) and route for processing no matter what the address is. There will be updates to the system in the future to improve and enhance how DGI reads information and directs claims, but until then, at least this won't slow down the process for the beneficiary.

Giovanna: But, it makes me wonder... How are we supposed to know there is a pending claim? Sometimes, documents are received at both offices around the same time.

Angela: In my experience, the only way to know would be if there is a '99 in DGI, and we notice that it's not in OUR claim folder, PLUS it's a school outside of our jurisdiction, or maybe even evidence of another claim in BDN, like an EP pending in the other office or an education folder in the other office. Otherwise, the VCE can just process the application without delay.

Giovanna: Yeah, that makes sense. Then we can move the folder, if necessary, and the beneficiary got a quick answer about their eligibility! If we have the file transferred before processing, it would just cause additional delay for no good reason.

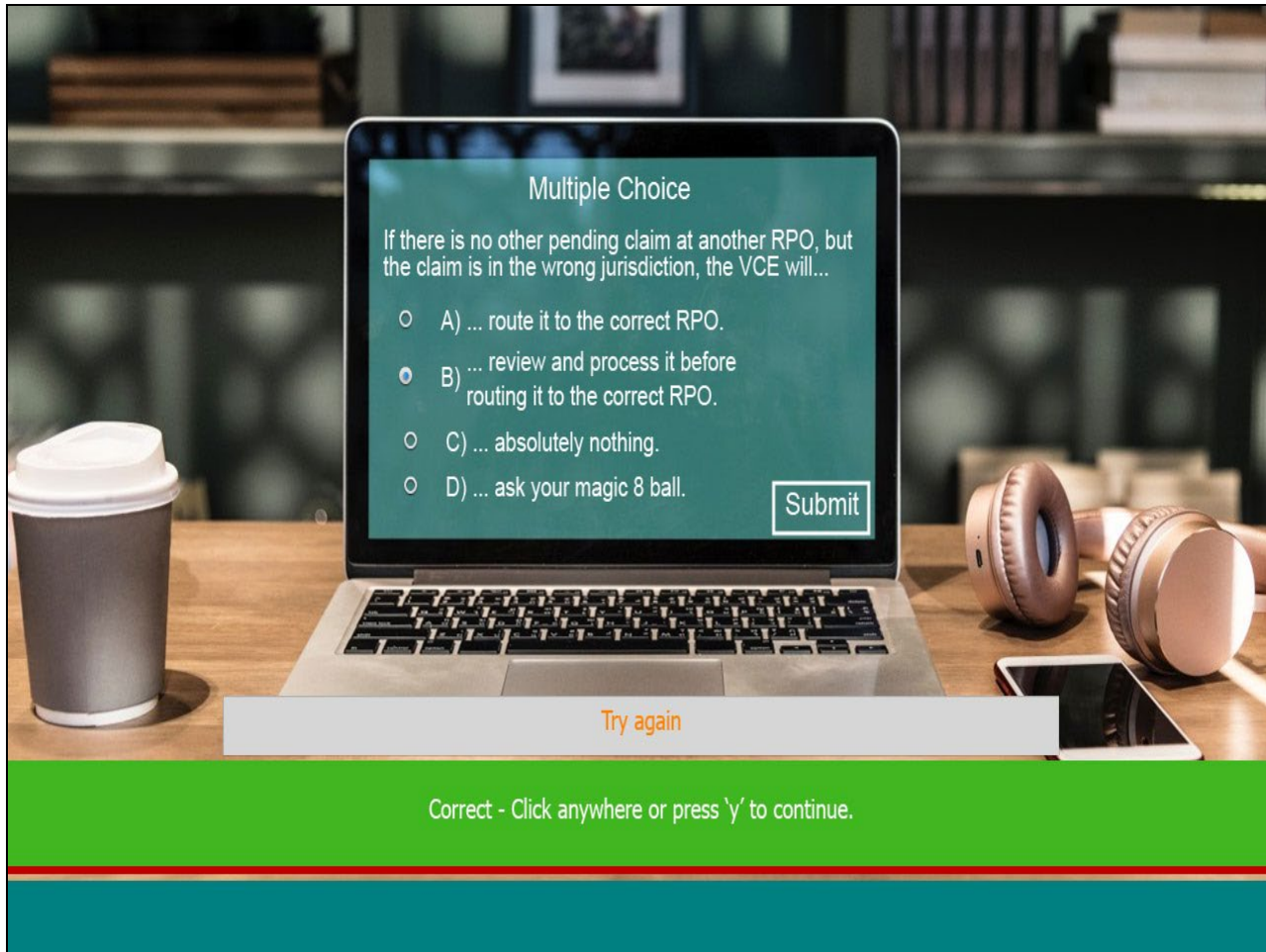
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Narrator (Juliana): During their discussion, Angela and Gio talked through several points to ponder. Let's review before moving to the next topic. Jurisdiction is primarily based on school location, but when no school information is provided on a 1990A or 1990G, DGI reads VADIR address instead of application address. If no pending claim, work the claim where it is received then move it. If no pending claim, work the claim where it is received then move it. This is great information! Let's get back to the discussion and hear what Angela and Giovanna have to say about VIS.

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Multiple Choice

If there is no other pending claim at another RPO, but the claim is in the wrong jurisdiction, the VCE will...

- A) ... route it to the correct RPO.
- B) ... review and process it before routing it to the correct RPO.
- C) ... absolutely nothing.
- D) ... ask your magic 8 ball.

Submit

Try again

Correct - Click anywhere or press 'y' to continue.

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Ominous Voice: Before we continue our discussion, it's time for another knowledge check.

This time we've got multiple choice. If there is no other pending claim at another RPO, but the claim is in the wrong jurisdiction, the VCE will...

- A) ... route it to the correct RPO.
- B) ... review and process it before routing it to the correct RPO.
- C) ... absolutely nothing.
- D) ... ask your magic 8 ball.

When you have your answer, click 'Submit'.

The correct answer is B.

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Giovanna: Now, I want to talk about this VIS capture thing. There was a recent advisory released which was intended to remind the VCE of the requirement to not only capture and review the VIS screen with each claim but also to ensure the systems are all updated with the current information. I think there was some confusion about when it is required and when it isn't. Could you clarify this for me?

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Supplemental Education Benefit Processing

1. Capture VIS Military History and Education Screens on every supplemental claim and review for any changes/updates required. A review and capture of VIS screens for a dependent and/or source may be required for FRY (Marine Gunnery Sergeant John David Fry Scholarship), TOE (Transfer of Entitlement) and/or Ch35 (Dependents' Educational Assistance) claims.
2. Compare the current VIS to current processing system for required changes and take all necessary processing actions. This could include development action and further review of file before making system changes. Note any action which requires explanation to support your decision. Do not rely on a DGI message to process the claim.

Hard Copy Certifications, Section 1010 or attendance certifications from a student to VA (including text errors) and Chapter 35/FRY supplementals do not require VIS capture/review/update.

3. As always, any new documentation or correspondence from a beneficiary should be reviewed and properly adjudicated.
4. If the review of VIS uncovers an Administrative Error, disposition of the Administrative Error including higher-level signature authority approval is required before addressing any additional claim action.

Questions: If you have any questions, please direct them to the Quality Assurance Team-Processing at eduopsintegrity.vbavaco@va.gov.

In exception to... Hard Copy Certifications and Text Verification documents like those TXTERROR documents, plus Chapter 35 and Fry supplemental claims

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Angela: Yes. I saw this advisory and my first thought was: Capture it with everything, review it, and make the updates. But then I noticed there were a few exceptions like some Certifications and Verification documents don't require this action, such as Hard Copy Certs and Text Verification documents like those TXTERROR documents in TIMS, plus Chapter 35 and Fry supplemental claims, they don't require the VIS review & capture either, and that makes sense.

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Giovanna: Okay, makes sense. Just make the capture and review of VIS a part of your routine with every claim, in exception to those listed. I think I'll keep this advisory on hand to double check until it becomes a habit.

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Angela: You know, this reminder to review VIS brings up another topic. Have you heard about the DGI system automating original decisions, when a beneficiary indicates they have excluded service, but VADIR shows no exclusion?

Giovanna: No, I hadn't heard about this. What is a VCE supposed to do? Are they expected to verify this conflict?

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**Points to Ponder:**

Fully automated claims have no master record

DGI automates, but VCE should review before paying:

EST/IADT for 80% or less

Erroneous relinquishment

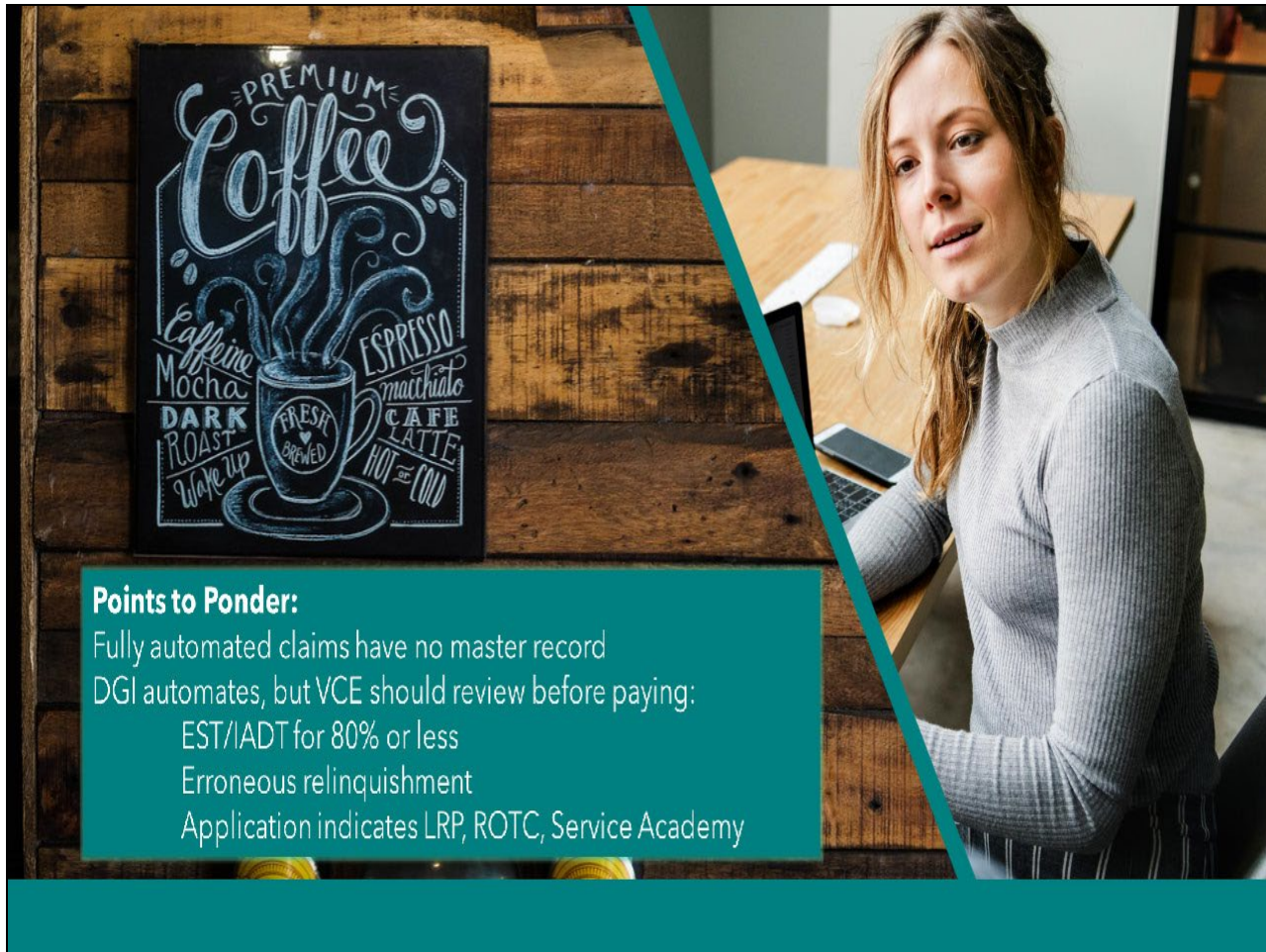
Application indicates LRP, ROTC, Service Academy

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Angela: Yeah, it's definitely something they should be on the look out for. I think in some cases, beneficiaries may select "Yes" without really knowing how they should answer. But when a VCE is reviewing a claim, which was automated completely in DGI, they should really pay attention to this area of the application and look to see if development is needed. It is common practice to review the claim before paying the first award, but this was something I thought I would really want to know about. So, I thought I would share.

Giovanna: I'm so glad you did. These changes are taking some time to get used to. Like when you pull up one of those fully automated originals, it looks totally different. There is no original End Product (EP) established in BDN and there is no Master Record (MR) established in BDN either. So we won't see an End Product captured on the TIMS file for automated original claims.

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Points to Ponder:

- Fully automated claims have no master record
- DGI automates, but VCE should review before paying:
 - EST/IADT for 80% or less
 - Erroneous relinquishment
 - Application indicates LRP, ROTC, Service Academy

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Angela: Yes, it sure is. It will take some time to adjust, but just knowing what to expect makes me feel more confident. If I pull up a 1990A, I now know to expect no Master Record (MR) and I have to send it to have a supplemental End Product (EP) created, so I can create the Master Record (MR). And now I also know I really need to pay attention to the excluded service section of the application, to see if they indicated LRP or ROTC or Service Academy. It's also important to review for excluded Entry Level Skill Training or EST, sometimes referred to as IADT (Initial Active Duty Training). This is not always listed in VIS and when it's missing, DGI doesn't look for it or at least not yet. This isn't too bad unless the beneficiary is at the 80% benefit level or below. Then it could change their eligibility level. You know, I've also noticed that DGI will accept a relinquishment, even when the person wasn't eligible for the benefit. This could be detrimental in the long run. But I've learned to look for it, since I noticed it on a few claims, and it's an easy fix. I've heard system improvements are planned in the near future, but until then, I will be watchful and verify conflicts whenever necessary.

Giovanna: You know, Angela, you're right. Knowledge is power. Just knowing it happens is half the battle. The other half is... finding these conflicts and system nuances and managing them before erroneous payments go out. Now I know this should not be overlooked or just trusted. But we should really pay attention to the automated originals and be sure the correct decision is being made.

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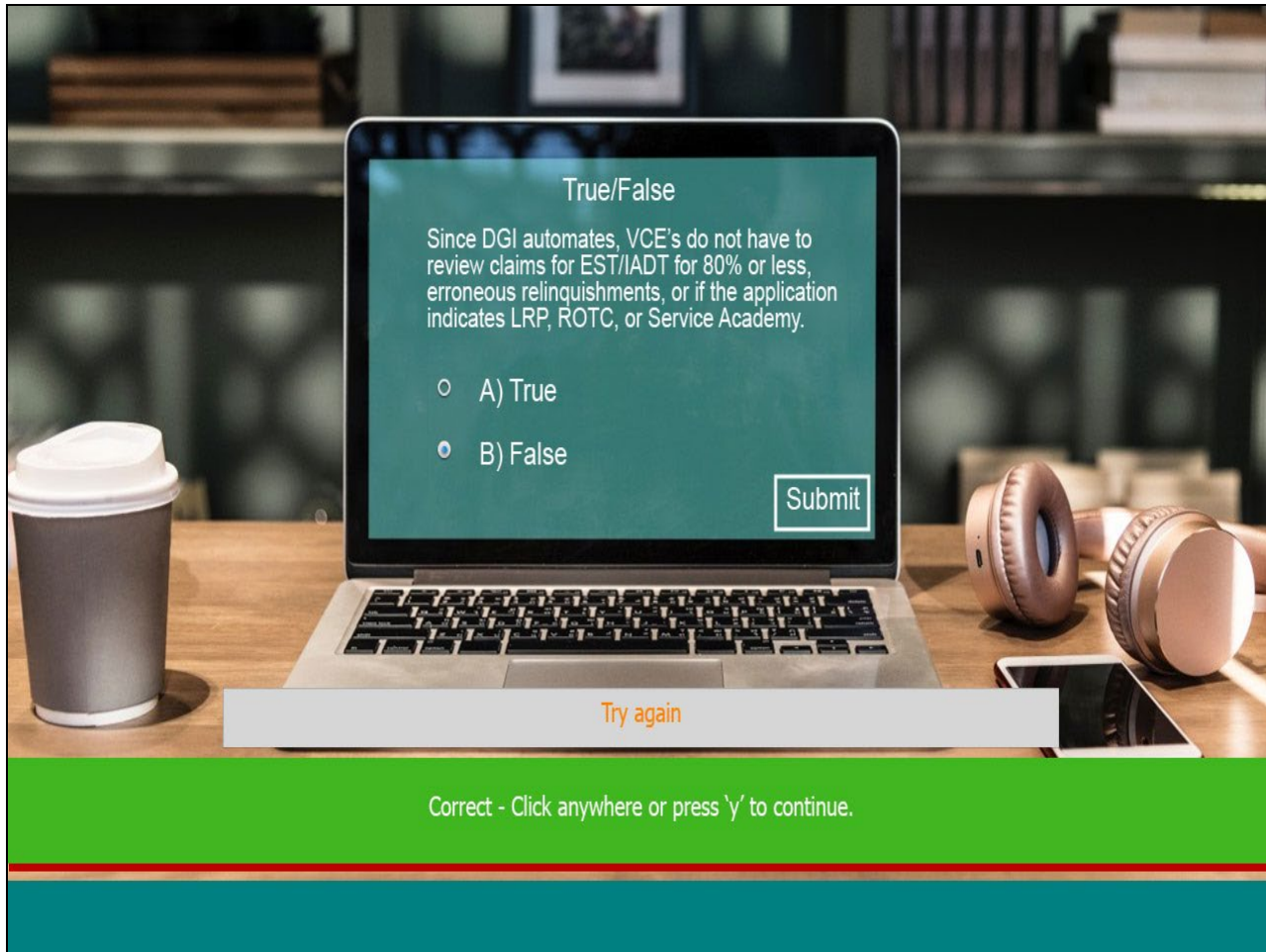


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Angela: It's always nice to talk it out with a colleague. Thanks for listening and chatting with me today Gio. I think it was a good information sharing session and I have learned so much.

Giovanna: Me too! Great discussion.

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Ominous Voice: It's time for one last knowledge check.

True or False.

Since DGI automates, VCE's do not have to review claims for EST/IADT for 80% or less, erroneous relinquishments, or if the application indicates LRP, ROTC, or Service Academy.

When you have your answer, click 'Submit'.

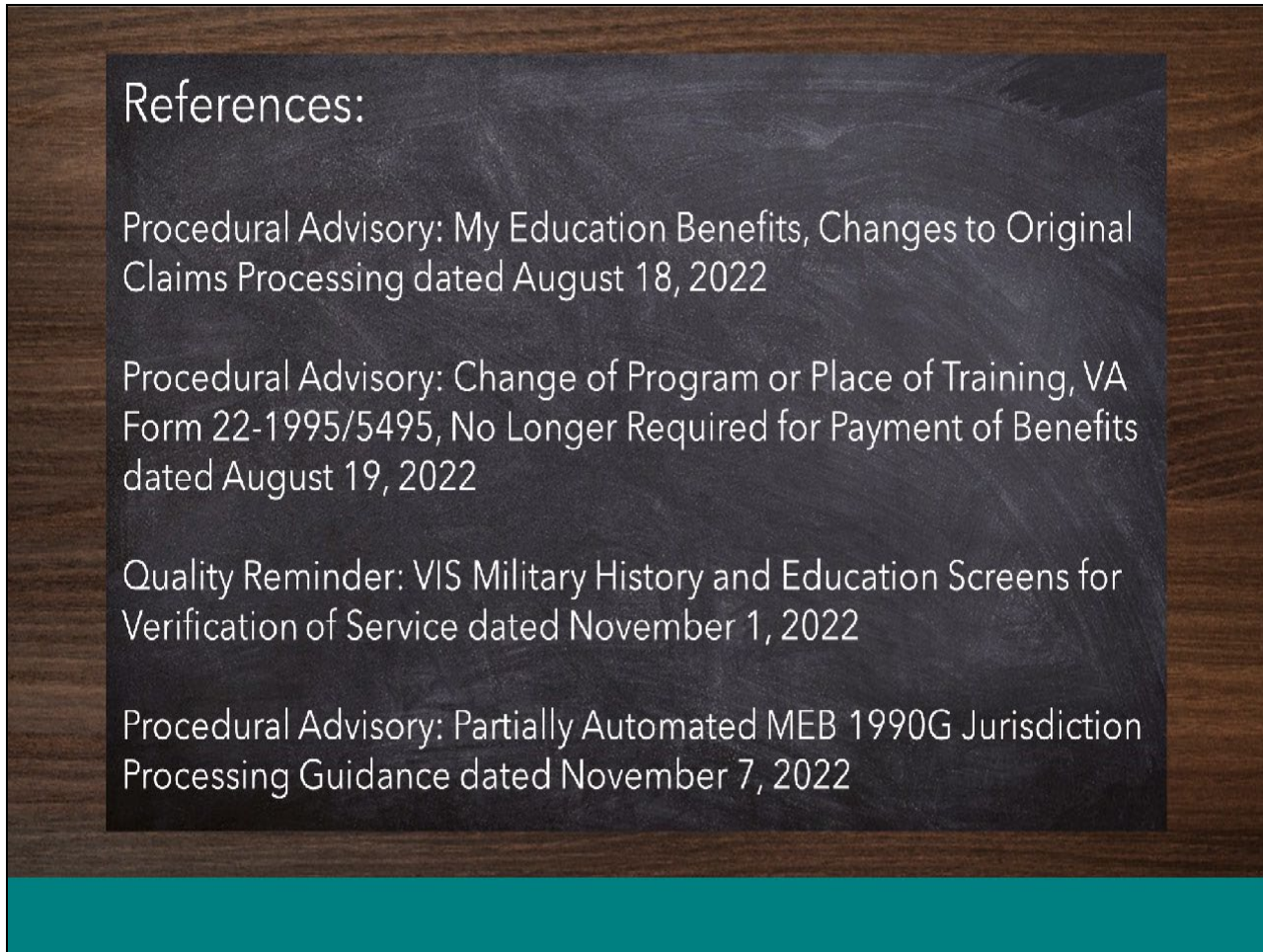
The correct answer is B.

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**Slide notes**

Narrator (Juliana): We've received such valuable insight and several points to ponder in today's session. Let's review before we wrap up. VIS must be captured, reviewed, and updates made to all systems on all claims. DGI automates but VCE's should review for conflicts and potential excluded service prior to first award. Fully automated claims have no Master Record (MR). These were all great points to ponder while working claims. Angela and Giovanna's discussion took us through several procedural advisories and provided us with some insight into the DGI automation engine and what to expect when reviewing fully automated original claims.

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Narrator (Juliana): Here are the references reviewed. We hope you enjoyed today's discussion covering DGI Automation and VCE Expectations. There is a brief assessment with a variety of questions, comprised of the information you learned today. Be sure to complete the assessment and a short survey to receive credit for today's session.

Reference Links:

- [Procedural Advisory: My Education Benefits, Changes to Original Claims Processing dated August 18, 2022](#)
- [Procedural Advisory: Change of Program or Place of Training, VA Form 22-1995/5495, No Longer Required for Payment of Benefits dated August 19, 2022](#)
- [Quality Reminder: VIS Military History and Education Screens for Verification of Service dated November 1, 2022](#)
- [Procedural Advisory: Partially Automated MEB 1990G Jurisdiction Processing Guidance dated November 7, 2022](#)

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Ominous Voice: Until next time!

Points to Ponder

- Development is no longer required for a change of program and place of training form when a beneficiary changes program and school.
- WEAMS capture is required for each new school, but not for each program change, receipt of an enrollment at an extension campus nor with each supplemental claim.
- An election may be required for overlapping programs when switching from one to another. This begin / end date election may be obtained by phone, mail or electronically.
- If processing an enrollment certification and a VA Form 22-1995 or 5495, it is not required to send a COE. The award letter will suffice. Use the earliest claim date.
- Claim pending at another RPO: The VCE will take no action on the 1990G and follow local file transfer request procedures for the folder to be sent to the correct RPO.
- No other pending claim at another RPO: The VCE will review the claim and process the corresponding Certificate of Eligibility (COE)/Denial. Once complete, follow local file transfer request procedures for the folder to be sent to the correct RPO.
- VIS must be captured, reviewed and updates made to all systems on all claims
 - **Exceptions:** Hard Copy Certs, Text Verification documents (i.e. TXTERROR), Chapter 35 and Fry Supplementals
- Fully automated claims have no master record
- DGI automates, but VCE should review before paying:
 - EST/IADT for 80% or less
 - Erroneous relinquishment
 - Application indicates LRP, ROTC, Service Academy