

VA Form 21-3537b Report of Field Examination VBMS-Fiduciary



Objective

To provide the authorized user with steps on how to generate a VA 21-3537b Report of Field Examination in VBMS-Fiduciary.



Audience

User: Authorized user

Instructions

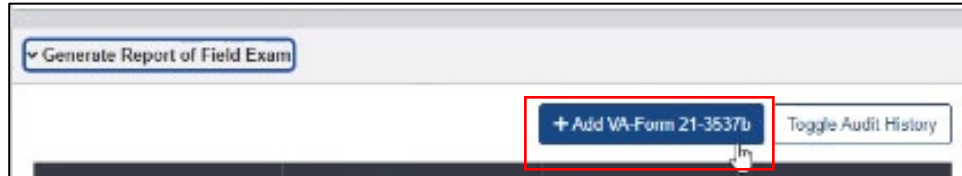
Users who are assigned the below End Products (EP) can generate a **VA Form 21-3537b – Report of Field Examination**:

Misuse Record	EP 590 Non-Fiduciary Program Field Exam	EP 930 FID - Rev Unsched Follow-Up Field Exam Local Qty	EP 930 FID - Rev Tel Follow-Up Field Exam Local Qty
EP 590 Fund Usage Field Exam	EP 930 FID - Rev Fund Usage Field Exam Local Qty	EP 930 FID - Rev Unsched Follow-Up Field Exam Natl Qty	EP 930 FID - Rev Tel Follow-Up Field Exam Natl Qty
EP 590 Unscheduled Follow Up Field Exam	EP 930 FID - Rev Fund Usage Field Exam Natl Qty	EP 930 FID - Rev Unsched Follow-Up Field Exam Other	EP 930 FID - Rev Tel Follow-Up Field Exam Other
EP 590 Telephone Follow Up Field Exam	EP 930 FID - Rev Fund Usage Field Exam Other	EP 930 FID - Rev Non-Fid Prog Field Exam Local Qty	EP 930 FID - Rev Non-Fid Prog Field Exam Natl Qty
EP 930 FID - Rev Non-Fid Prog Field Exam Other			



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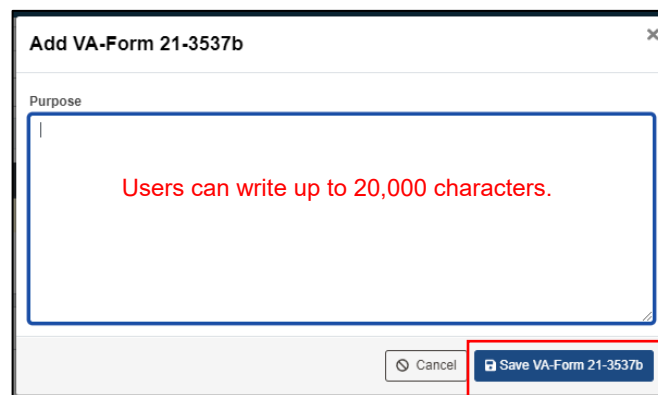
1. To begin the process, under the EP overview tab, a user will need to access the table titled “**Generate Report of Field Exam**”. Within this table click the button “**Add VA-Form 21-3537b**”.



2. Users will then be prompted to document the results of interviews and fact findings during field exams or misuse investigations into the Purpose field. Once entered, click "Save VA-Form 21-3537b."

Note: In open status, a 21-3537b can be previewed, edited or discarded. Discards are logged in the Audit History and not retrievable by users.

- The below fields will be auto populated within the 21-3537b:
 - Veteran's Name
 - Date of Request
 - VA File Number
 - Social Security Number
 - Originating Office
 - Reporting
 - Report Made By
 - Date of Report
- The Purpose section will be the only free text section that users will be required to fill out.

A screenshot of a web application form titled 'Add VA-Form 21-3537b'. The form has a 'Purpose' field which is a large text area. Inside the text area, there is a red text prompt: 'Users can write up to 20,000 characters.' At the bottom of the form, there are two buttons: 'Cancel' and 'Save VA-Form 21-3537b'. The 'Save VA-Form 21-3537b' button is highlighted with a red rectangular box.

Exception: When generated from a Misuse Record/EP, the **Purpose** field is pre-populated with the contents of the **Allegation Statement** from the Misuse Record.



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3. After the user has saved the VA Form 21-3537b, they can finalize the form by clicking the Preview button. Once in the Preview screen, users can click the Generate Letter button to finalize the VA Form 21-3537b.

Note: Once the 21-3537b is finalized and in Completed status, users will no longer be able to edit or discard the form.

Activity	Report Made By	Status	Actions
VA-Form 21-3537b	HENDRICK_I_FCAC	OPEN	Preview, Edit, Discard
VA-Form 21-3537b	HENDRICK_I_FCAC	COMPLETED	View

TESTING PURPOSES ONLY

Important

Multiple reports of the VA Form 21-3537b – *Report of Field Examination* may be independently generated and associated per EP. However, each user may only have one VA 21-3537b – *Report of Field Examination* in-progress per EP at any time.

Outcome

Once finalized, the VA Form 21-3537b – *Report of Field Examination* will populate into the VBMS eFolder.

