

Office of Administrative Review

Automated VA Form 20-0999



Purpose

This Job Aid is to guide claims processors on how to access, create, and edit the automated VA Form 20-0999, *Higher-Level Review Return*.

Audience



Claims processors using the VA Form 20-0999 to create a Duty to Assist Error (DTA) or Difference of Opinion (DoO) based on a higher-level review (HLR) determination.



References

[Automated VA Form 20-0999 Platform](#)

Instructions

Users can create a new automated VA Form 20-0999, or they can edit a previously submitted VA Form 20-0999. Follow these steps for each scenario:

Creating a new VA Form 20-0999

Log-in to dashboard using your PIV: [Automated VA Form 20-0999 Platform](#)

1. The “Create a New Higher-Level Review” page will surface with a search bar.



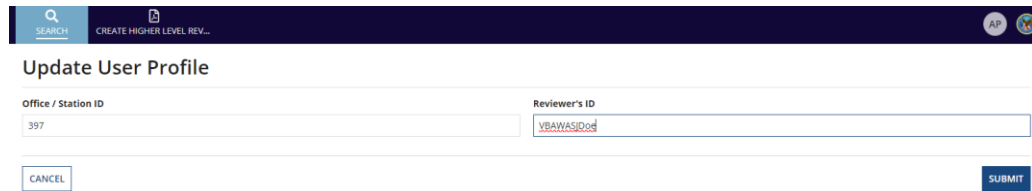
2. Navigate to the “Search” page to initially update the “Update User Profile.”



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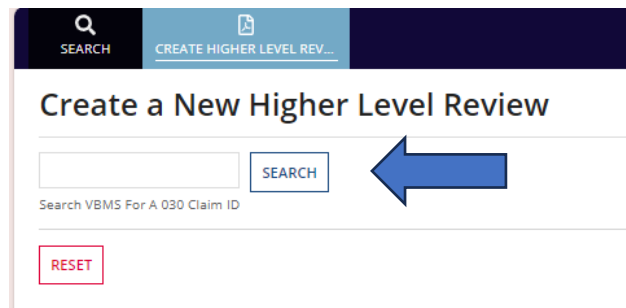
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- Click on the “Update User Profile” icon to update users’ appropriate “Office/Station ID” (example: 397) and update the “Reviewer ID” to the users’ current LAN-ID (example: VBAWASJDoe). Once the appropriate updates are made, click “Submit.”
 - This is a one-time initial update (unless user changes station/location).
 - The information will populate on the finalized VA Form 20-0999 in the VBMS eFolder.



The screenshot shows the 'Update User Profile' form. At the top, there is a navigation bar with 'SEARCH' and 'CREATE HIGHER LEVEL REV...'. The form has two input fields: 'Office / Station ID' with the value '397' and 'Reviewer's ID' with the value 'VBAWASJDoe'. Below the fields are 'CANCEL' and 'SUBMIT' buttons.

- Navigate back to the “Create Higher Level Review” page and input the Benefit Claim ID (BCID) and select “Search.”



The screenshot shows the 'Create a New Higher Level Review' form. At the top, there is a navigation bar with 'SEARCH' and 'CREATE HIGHER LEVEL REV...'. The form has a search input field with a 'SEARCH' button next to it. A blue arrow points to the 'SEARCH' button. Below the search field is the text 'Search VBMS For A 030 Claim ID' and a 'RESET' button.

- The following screen will populate with specific contention level information:

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Contention	Date Of Decision Notice	Options	Action Selection	Comments
Service connection for migraine is denied.	mm/dd/yyyy	<input type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion		
Service connection for traumatic brain injury (TBI) (also claimed as:	mm/dd/yyyy	<input type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion		
Service connection for memory loss is denied.	mm/dd/yyyy	<input type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion		
Service connection for neck degenerative arthritis is denied.	mm/dd/yyyy	<input type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion		
The previous denial of service connection for sleep apnea (now cla	mm/dd/yyyy	<input type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion		

[Add New Contention](#)

[RESET](#)

6. The following steps will be completed on the main screen *above*:
 - a. Verify the following for accuracy:
 - Claim ID
 - Veteran or claimant first and last name
 - All contentions from the Claim ID are present
 - b. Delete any contentions that will not be addressed on the VA Form 20-0999 by selecting the **red** trash can icon on the right-hand side.
 - c. Edit the text in the “Contention” column as necessary.

Contention ←

Service connection for migraines with vertigo

- Private Medical Records
- Examination

[+ Add New Contention](#)



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- d. Enter the applicable date in the “Date of Decision Notice” column.

Date Of Decision Notice
01/01/2024

- e. Select each required development option per contention (multiple options can be selected at once) in the “Options” column.

Options
<input checked="" type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input checked="" type="checkbox"/> Examination <input type="checkbox"/> Medical Opinion
<input checked="" type="radio"/> DTA <input type="radio"/> DOO <input type="radio"/> Other
<input checked="" type="radio"/> DTA <input type="radio"/> DOO <input type="radio"/> Other

- Each selected development option will surface under the applicable contention in the “Contention” column.
- Select DTA, DoO, or Other in the “Options” column for each development option associated to the contention.

ii. **Examination and/or Medical Opinions:**

- Select the applicable DBQ(s) and/or Medical Opinion(s) from the dropdown list (multiple can be selected).

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Action Selection



DBQ ENT Ear (Including Vestibular and Infectious), DBQ NEU ...

- Enter necessary comments in the "Comments" column.

Comments



Needs PMRS from Dr. Smith (RE- 4142/4142a received 6/1/2024)

Insert any guidance/notes here

iii. Records:

- Enter necessary comments in the "Comments" column.

Comments



Needs PMRS from Dr. Smith (RE- 4142/4142a received 6/1/2024)

Insert any guidance/notes here

7. After all contentions and applicable development actions are added, select "Preview PDF" in the lower right-hand side.

SEARCH | LOGOUT | REGISTER | HELP | DBQ

Create a New Higher Level Review

Claim ID: 105640844 | Claim Type: JAGON | Veteran First Name: JAGON | Veteran Last Name: ANTONICH

Contention	Date Of Decision Notice	Options	Action Selection	Comments
Service connection for migraines with vertigo	01/01/2024	<input checked="" type="checkbox"/> Private Medical Records <input type="checkbox"/> Federal Medical Records <input type="checkbox"/> Other Medical Records <input type="checkbox"/> Other Records <input checked="" type="checkbox"/> Examination <input type="checkbox"/> Private Medical Records <input type="checkbox"/> Examination <input checked="" type="radio"/> DTA <input type="radio"/> DDD <input type="radio"/> Other <input type="radio"/> DTA <input type="radio"/> DDD <input type="radio"/> Other	DBQ ENT Ear (Including Vestibular and Infectious), DBQ NEU	Needs PMRS from Dr. Smith (RE- 4142/4142a received 6/1/2024) Insert any guidance/notes here

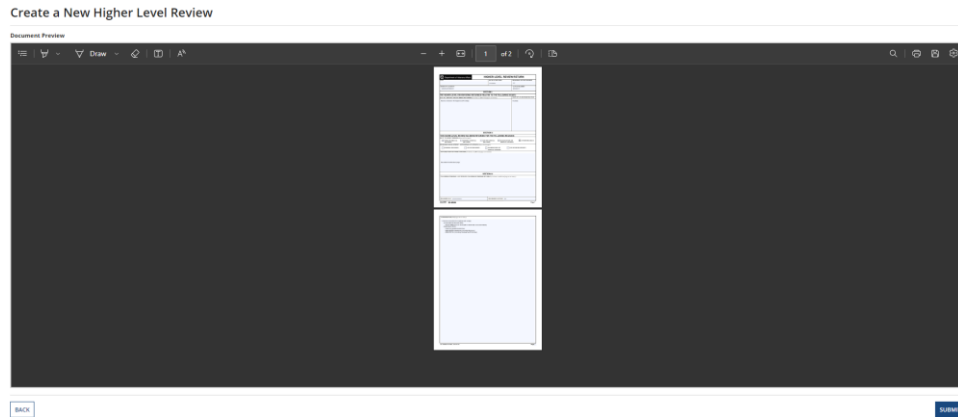
RESET | PREVIEW PDF



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- Review generated PDF for accuracy (the generated PDF can also be saved locally).



- If everything on the form is accurate, select "Submit" and go to step 9.
- If changes are required, select "Back," and repeat previous steps. *Edits made within the preview screen will not save, they must be updated on the main screen and not in preview mode.*

- Review the VBMS eFolder to validate the VA Form 20-0999 is uploaded and is accurate.

Department of Veterans Affairs		HIGHER-LEVEL REVIEW RETURN	
NAME	DATE OF RETURN	REGIONAL OFFICE NUMBER	
594 - NATIONAL ASSOC. OF COUNTY VETERANS SERVICE OFFICER	4/30/2024	317	
NAME OF CLAIMANT	VA FILE NUMBER		
MICHAEL SUGARMAN	27863488		
SECTION I			
THE HIGHER-LEVEL REVIEW BEING RETURNED RELATES TO THE FOLLOWING ISSUES:			
LIST ALL SPECIFIC ISSUES BEING RETURNED (Continue on additional page as necessary)		DATE OF VA DECISION NOTICE	
Service connection for low back condition	2/20/2024		
Service connection for neck condition	2/20/2024		
Service connection for traumatic brain injury	2/20/2024		
Service connection PTSD claimed additional health	2/20/2024		
SECTION II			
THE HIGHER-LEVEL REVIEW HAS BEEN RETURNED FOR THE FOLLOWING REASONS:			
DO NOT TO CHECK UNLESS CHECKED ON THE OTHER SIDE			
<input type="checkbox"/> PRIVATE MEDICAL RECORDS	<input checked="" type="checkbox"/> FEDERAL MEDICAL RECORDS	<input type="checkbox"/> OTHER MEDICAL RECORDS	<input checked="" type="checkbox"/> EXAMINATION OR MEDICAL OPINION
<input type="checkbox"/> OTHER RECORDS	<input type="checkbox"/> OTHER DEVELOPMENT	<input type="checkbox"/> EXAMINATION OR MEDICAL OPINION	<input type="checkbox"/> OTHER DEVELOPMENT
EXPLANATION FOR ITEMS CHECKED (Continue on additional page as necessary)			
See attached attention page			
SECTION III			
FAVORABLE FINDINGS: LIST SPECIFIC FAVORABLE FINDINGS BY ISSUE (Continue on additional page as necessary)			
REVIEWER'S ID: Higham-hagan	REVIEWER'S OFFICE: 317		
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CONTINUATION (Add pages as necessary)	
1. Service connection for low back condition: - Federal Medical Records (FMR) - PIES request for reserve records was incorrect as it was to Army vs Marines, request all reserve records from USMC (PIES RV1) to get all records from USMC to include STMs - Examination (STM) - Recent examination since STMs are received - OIG MDCS Back (Manufacturing agent) - Medical Opinion (FMR)	
2. Service connection for neck condition: - Please request medical opinion regarding current back complaints and the duties in service relating to heavy lifting - Direct service connection - Service connection for neck condition - Federal Medical Records (FMR) - PIES request for reserve records was incorrect as it was to Army vs Marines, request all reserve records from USMC (PIES RV1) to get all records from USMC to include STMs - Examination (STM) - Recent examination since STMs are received - OIG MDCS Back (Manufacturing agent) - Medical Opinion (FMR)	
3. Service connection for traumatic brain injury: - Federal Medical Records (FMR) - PIES request for reserve records was incorrect as it was to Army vs Marines, request all reserve records from USMC (PIES RV1) to get all records from USMC to include STMs - Examination (STM) - After STMs received then request examination - OIG MDCS Back (Manufacturing agent) - Medical Opinion (FMR) - My testimony supports in service incident involving getting hit in the head by fellow soldier. After requesting reserve records please examine and all copies of current disability/medical of TB are sent to the indicated incident in service.	
4. Service connection PTSD claimed additional health: - Federal Medical Records (FMR) - Request Marine Service records via PIES request noted above - Examination (STM) - OIG PSYCH PTSD Initial	
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Editing a Previously Submitted VA Form 20-0999

1. Login to dashboard using your PIV: [Automated VA Form 20-0999 Platform](#)
2. Select “Search” in the top left of the blue banner.



OAR ID	VBMS Claim ID	Veteran File ID	Veteran First Name	Veteran Last Name
174	105640844	623303311	JASON	ANTONICH
173	108023796	571870364	JOSE	MALDONADO

3. Input the Benefit Claim ID (BCID), SSN, or file number into the “Search Higher Level Reviews” search bar.



OAR ID	VBMS Claim ID	Veteran File ID	Veteran First Name	Veteran Last Name
174	105640844	623303311	JASON	ANTONICH
173	108023796	571870364	JOSE	MALDONADO

4. To access the previous submission, select the number in the “OAR ID” column.



OAR ID	VBMS Claim ID	Veteran File ID	Veteran First Name	Veteran Last Name
174	105640844	623303311	JASON	ANTONICH
173	108023796	571870364	JOSE	MALDONADO

5. The previously generated VA Form 20-0999 will surface for review.
6. Select “Edit” in the top right-hand side.



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OAR ID: 174 Has Been UPLOADED For Claim ID: 105640844



Department of Veterans Affairs
HIGHER-LEVEL REVIEW RETURN

DATE OF RETURN: [] REGIONAL OFFICE NUMBER: []
VA FILE NUMBER: [] ADDRESS: []

SECTION 1
THE HIGHER LEVEL REVIEW BEING RETURNED RELATES TO THE FOLLOWING ISSUES:
DATE OF VA DECISION NOTICE: []
ISSUES: []

SECTION 2
THE HIGHER LEVEL REVIEW HAS BEEN RETURNED FOR THE FOLLOWING REASONS:
 FEDERAL MEDICAL RECORDS FEDERAL MEDICAL RECORDS OTHER MEDICAL RECORDS EXAMINATION ON RECORDS OTHER RECORDS
 FEDERAL MEDICAL RECORDS OTHER RECORDS EXAMINATION ON RECORDS OTHER RECORDS
 FEDERAL MEDICAL RECORDS OTHER RECORDS EXAMINATION ON RECORDS OTHER RECORDS

7. Make necessary edits in the contention screen.

Create a New Higher Level Review

Contention: Memory loss | Date of Decision Notice: 08/29/2023

Options:
 Private Medical Records
 Federal Medical Records
 Other Medical Records
 Examination
 Medical Option

Action Selection:
 DBQ Medical Option, DBQ PTSD/PTSD Review
 Other

Comments: Examiner is this veteran's memory loss at least as likely

Buttons: RESET, Preview PDF

8. Select "Preview PDF" in the lower right-hand side.

Create a New Higher Level Review

Contention: Memory loss | Date of Decision Notice: 08/29/2023

Options:
 Private Medical Records
 Federal Medical Records
 Other Medical Records
 Examination
 Medical Option

Action Selection:
 DBQ Medical Option, DBQ PTSD/PTSD Review
 Other

Comments: Examiner is this veteran's memory loss at least as likely

Buttons: RESET, Preview PDF

9. Review generated PDF for accuracy (the generated PDF can also be saved locally).



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Create a New Higher Level Review

Document Preview

Department of Veterans Affairs

HIGHER-LEVEL REVIEW RETURN

DATE OF RETURN: 8/15/2024 RECEIVING OFFICE NUMBER: 051

NAME OF CLAIMANT: JANDA, ANTONIOH VA FILE NUMBER: 8203051

SECTION I

THE HIGHER-LEVEL REVIEW BEING RETURNED RELATES TO THE FOLLOWING ISSUES:

DATE OF VA DECISION NOTICE: 8/20/2023

SECTION II

THE HIGHER-LEVEL REVIEW HAS BEEN RETURNED FOR THE FOLLOWING REASONS:

CAUSE TO ASSIST ERROR (Select all that apply):

PRIVATE MEDICAL RECORDS FEDERAL MEDICAL RECORDS OTHER MEDICAL RECORDS EXAMINATION OR MEDICAL OPINION OTHER RECORDS

REQUIRED DEVELOPMENT - DIFFERENCE OF OPINION (Select all that apply):

FEDERAL RECORDS OTHER RECORDS EXAMINATION OR MEDICAL OPINION OTHER DEVELOPMENT

EXPLANATION FOR ITEMS CHECKED (Select on additional page or screen):

See attached addendum page

BACK SUBMIT

- a. If everything on the form is accurate, select “Submit” and go to step 10.
 - b. If changes are required, select “Back,” and repeat previous steps. *Edits made within the preview screen will not save, they must be updated on the main screen and not in preview mode.*
10. Review the VBMS eFolder to validate the VA Form 20-0999 is uploaded and is accurate.
- a. *If a VA Form 20-0999 is resubmitted, the claims processor is responsible for eFolder management. Automation **will not** manage, replace, or delete previously uploaded VA Form 20-0999s.*

Important Reminders



Ensure users search by Benefit Claim ID (BCID) number when creating the initial VA Form 20-0999 and not claim number to avoid unwarranted error messages when searching.



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Other Resources



[M21-5, Chapter 5 - Higher-Level Review Procedures \(va.gov\)](#)



Questions

Discuss any questions on this Job Aid locally with peers, experts, quality staff, and/or management. Management may route any questions requiring OAR assistance to OARADMIN.VBAWAS@va.gov.