

Status of Claim Job Aid

- 1) Once the record is accessed, you will see how many claims are pending in the quick view pane.
- 2) Ensure appropriate ID Protocol is complete.
 - a. Select Identify Veteran and ID Proof Complete or ID Proof Complete, as appropriate.

The screenshot displays the Unified Service Desk interface for a Veteran Search. The top navigation bar includes 'Unified Service Desk' and various call management options. The main header identifies the subject as 'VETERAN, JOHN'. Below this, there are tabs for 'Document(s) exist in VBMS', 'Homeless', 'POW', and 'VBMS'. The left sidebar contains a detailed profile for 'VETERAN, John', including SSN (123123123), Branch of Service (ARMY), Station of Jurisdiction (328 - Chicago), Character of Discharge (HON), Rank, POA (2AX - JOEL B MITCHELL), DOB (1/1/1945), Gender (M), and DOD. It also shows OGC Database Link, Fiduciary Info, S/C Combined Rating, NSC Combined Degree, Award Type, Pay Status, Last Paid Date, Amount, Next Scheduled Pay Date, Next Amount, Pending Claims (0 open claim(s)), Pending Appeals (0 pending appeal(s)), Mailing Address (4676 LOGSDON DR TEST A11 APO AE 09021), Last Phone Call History (03/28/2018 8:26 AM Claim General Status Success), and a 'REFRESH' button.

The main content area is titled 'Veteran Search' and is divided into three sections:

- Section 1 - Search By Traits:** Includes input fields for *SSN (123123123), First, *Last (VETERAN), *Month (01), *Day (01), and *Year (1945). Buttons for 'Search', 'Reset', and 'Alternate Search' are present.
- Section 2 - Search By EDIPI:** Includes an input field for *EDIPI and 'Search' and 'Reset' buttons.
- Section 3 - Search Results:** Displays a message: 'A search in MVI did not find any records matching the search criteria. A search in CORPDB found 1 matching record(s)'. Below this is a table with columns: SSN, First Name, Last Name, Date of Birth, Br. of Svc, Rank, Gender, Address, EDIPI, and Sens. L. The table contains one record:

SSN	First Name	Last Name	Date of Birth	Br. of Svc	Rank	Gender	Address	EDIPI	Sens. L
<input checked="" type="checkbox"/> 123123123	<input checked="" type="checkbox"/> JOHN	<input checked="" type="checkbox"/> VETERAN	<input checked="" type="checkbox"/> 1/1/1945	<input checked="" type="checkbox"/> ARMY		M	4676 LOGSDON DR 09021		0

 Below the table are buttons for 'Identify Veteran and ID Proof Complete', 'ID Proof Complete', and 'ID Proof Failed'.

At the bottom left, there is a 'CALL SCRIPT' section with a dropdown menu set to 'New Interaction', a greeting 'Hello! Please provide the veterans SSN', and instructions: 'Search for the veteran in the Search tab and select the veteran.' and 'Proceed to Caller Id'.

- 3) Ensure the fields for Caller's First Name, Caller's Last Name, Relationship, and Phone Number or No Phone # Available are populated.
- 4) Select Save.
- 5) Categorize the conversation with Request Type: Claim; Request Sub Type: General Status. Select "Create Request."

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The screenshot displays the VBA system interface for a claimant named VETERAN, JOHN. The interface is divided into several sections:

- Left Panel (Profile):** Contains personal information such as Name (VETERAN, JOHN), SSN / File Number (123123123 / 123123123), Station of Jurisdiction (101), Rank (PO4), and various dates. It also includes a 'CALL SCRIPT' section with instructions for the user.
- Top Navigation:** Includes tabs for INT. HISTORY, QUEUES, and INTERACTION & REQUEST.
- Interaction Details (Red Boxed Area):** Shows a specific interaction with Megan Davis on 09/13/2021 at 8:49:10 AM. It lists interaction details like Caller First Name (JOHN), Caller Last Name (VETERAN), Relationship (Veteran/Self), and Security Pin (3332).
- Request Selection:** Two dropdown menus allow the user to select a 'Request Type' (e.g., Appeals Modernization, eBenefits) and a 'Request Sub Type' (e.g., ITF/Generate ITF, Income Adjustment).

6) Make sure to review **flashes** associated with the record. Remember, these appear as blue icons at the top of the screen. Flashes provide important information about a claim or claimant and may impact your actions during the interaction.

7) Open the Claim tab. Double click on the claim for which you want status.

The screenshot shows the 'Claims' tab in the VBA system. It features a table with the following columns: Date of Claim, Claim Status, Claim Description, EPC, Claimant First Name, Claimant Last Name, Payee Type Code, and Last Action Date. A search bar is located at the top right of the table area.

Date of Claim	Claim Status	Claim Description	EPC	Claimant First Name	Claimant Last Name	Payee Type Code	Last Action Date
6/7/2021	CAN	eBenefits 526EZ-Supple...	400			00	6/7/2021
5/11/2021	CLR	eBenefits 526EZ-Supple...	020			00	6/17/2021
5/7/2021	CLR	Supplemental Claim Rating	040			00	6/17/2021
3/5/2021	CLR	eBenefits 526EZ-Supple...	400			00	3/8/2021
2/19/2021	CLR	eBenefits 526EZ-Supple...	020			00	4/23/2021
6/3/2020	CAN	eBenefits 526EZ-Supple...	400			00	6/4/2020
6/3/2020	CLR	eBenefits 526EZ-Supple...	020			00	9/18/2020

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Claims Details: Provides general information regarding the claim to include the claimant's name, station working the claim, and current claim status.

Claim Details | LifeCycles | Contentions | Tracked Items | Suspense | Evidence | Claims Letters

Claim Description	eBenefits S26EZ-Supplemental (020)						
Claimant First Name	Claimant Last Name	Claim Status	CLR	Last Action Date	3/29/2017		
Date of Claim	12/2/2016	Participant ID	33705496	Claim Station	499	EPC	020
Claim Type Code	020SUPP	Person/Org Indicator	P	Program Type Code	CPL		
PCLR/PCAN Explanation	---						

Id Proof

Status

Status Message ---

Refresh Run Report Excel Templates

Status: 1 Action Location Change Date

Life Cycle: Provides a brief history of the claim, and its current status.

Claim Details | LifeCycles | Contentions | Tracked Items | Suspense | Evidence | Claims Letters

LifeCycles

Claim ID 57064445

Refresh Run Report

Status	Change Date	PCAN/PCLR Reason	Explanation	Claim Station	Action Station	Action Person
Open	12/2/2016	---	---	499	281	ACCOUNT, SYSTEM
Open	12/2/2016	---	---	499	335	ACCOUNT, SYSTEM
Open	12/5/2016	---	---	499	499	ACCOUNT, SYSTEM
Open	12/5/2016	---	---	499	320	ACCOUNT, SYSTEM
Ready for Decision	12/6/2016	---	---	499	320	YARBROUGH, MARIO
Ready for Decision	12/7/2016	---	---	499	499	ACCOUNT, SYSTEM
Ready for Decision	2/15/2017	---	---	499	334	ACCOUNT, SYSTEM
Open	2/17/2017	---	---	499	334	PELLA, TRAVIS

Contentions: Provides the disabilities listed on the claim.

Claim Details | LifeCycles | Contentions | Tracked Items | Suspense | Evidence | Claims Letters

Contentions

Claim ID 57064445

Refresh

Contention	Classification	Diagnostic Code	Special Issues
posttraumatic stress disorder (related to: PTSD - Combat)	Mental Disorders	9411	---
major depression (related to: PTSD - Combat)	Mental Disorders	9435	---

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Tracked Items: Provides a list of items VA is gathering to support the claim. More will be discussed on this subtab later in this lesson.

eBenefits 526EZ-Supplemental (020)
Claim

Claim Details LifeCycles Contentions Tracked Items Suspense Evidence Claims Letters

Claim ID 57064445						
Development Action / Letter	Request Date	Received Date	Suspense Date	Closed Date	Receipt	
DBQ PSYCH PTSD Initial	2/17/2017	3/20/2017	3/19/2017	---	---	
DBQ Medical Opinion 1	2/17/2017	3/20/2017	3/19/2017	---	---	

Suspense: Provides information regarding the latest activity on the claim.

Claim Details LifeCycles Contentions Tracked Items Suspense Evidence Claims Letters

Claim ID 57064445		
Suspense Date	Suspense Reason	Action Completed On
12/12/2016	Pending Initial Development - Std 5103 Notice Not Required	12/2/2016
1/1/2017	Initial Review Pending	12/2/2016
1/5/2017	Ready for Decision	12/6/2016
3/19/2017	VA/Contract Exam Requested, Awaiting Results	2/17/2017
3/29/2017	Closed	3/29/2017
4/2/2017	Pending Authorization	3/28/2017
4/23/2017	Secondary Ready for Decision	3/24/2017
4/23/2017	Secondary Ready for Decision	3/24/2017

Evidence: Provides a view of unsolicited evidence for all claims. When confirming if we have received evidence this tab may be utilized; however, PCRs should also consider alternative search methods (VBMS) if the evidence of concern is not available in this subtab.

Claim Details LifeCycles Contentions Tracked Items Suspense Evidence Claims Letters

Claim ID 57064445		
Evidence Name	Date Received	Journal Date
VA Form 20-0995 Supplemental Claim Application	5/7/2021	5/18/2021
VA 21-0820 Report of General Information	12/8/2020	12/8/2020
VA 21-4142a General Release for Medical Provider Information	3/2/2020	3/5/2020
VA 21-4142 Authorization for Release of Information	3/2/2020	3/5/2020
VA 21-4138 Statement In Support of Claim	2/24/2020	2/27/2020
VA 21-4138 Statement In Support of Claim	2/19/2020	2/25/2020
VA 21-526EZ, Fully Developed Claim (Compensation)	12/13/2019	12/31/2019
VA 27-0820 Report of General Information	11/2/2017	11/6/2017
VA 27-0820 Report of General Information	10/24/2017	10/26/2017

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Claims Letters: Provides letters sent to either claimants or third parties in attempt to obtain evidence to support a claim. Sometimes these letters can be accessed via this tab; however, PCRs should also utilize VBMS if tracked items suggest a pending development letter that cannot be accessed via this tab.

Claim Details LifeCycles Contentions Tracked Items Suspense Evidence Claims Letters

Claim ID				Refresh
Type of Letter	Type Code	Participant Id	Date Issued	
---	CLMNRQST	33705496	---	

8) Ensure any required claim development actions are completed.