

CRM/UD-O Service Requests Job Aid

How to create a VA Form 27-0820 Service Request in CRM/UD Review

To demonstrate this segment: In the training environment, create a whole call roll-play scenario where a volunteer completes a VA Form 27-0820 while the class observes.

Navigate to the **Search** section, **Caller and Call Type** subsection.

The screenshot shows the 'Veteran Search' interface. It is divided into three sections:

- Section 1 - Search By Traits:** Fields for *SSN, First, *Last (Campbell), *Month (07), *Day (26), and *Year (1963). Buttons for Search, Reset, and Alternate Search.
- Section 2 - Search By EDIPI:** Field for *EDIPI with Search and Reset buttons.
- Section 3 - Search Results:** A table with columns: SSN, First Name, Last Name, Date of Birth, Br. of Svc, Rank, Gender, Address, EDIPI, Sens. Level, and Source. A single record is shown for DEBBIE CAMPBELLS, born 07/26/1963, rank F, EDIPI 1077010064, Sens. Level 0, and Source MVI. Below the table are buttons for 'Identify Veteran and ID Proof Complete', 'ID Proof Complete', and 'ID Proof Failed'.

Select the applicable **Call type** and **Subtype** based on the caller's request.

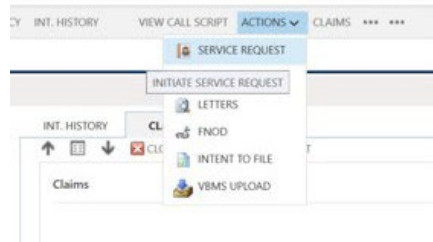
Two dropdown menus are shown side-by-side:

- Select Request Type:** A list of request types including Appeals, Appeals Modernization, BVA Appeal, Contract Examinations, Claim, Correspondence and Forms, Dependent Maintenance, eBenefits, Fiduciary, FNCO, FOIA/Privacy Act, General Benefits Information for VBA, Ghost Call/Disconnected Call, Media Inquiries, Mission Act, General Benefits Information for VHA, General Benefit Information For NCA, Non-Va Calls, Novel Coronavirus, Payments / Debts, RAMP, Potential Incident, and Sensitive File.
- Select Request Sub Type:** A list of subtypes including Create Request, Burial Plot and Transportation benefits, DIC (Dependency and Indemnity Compensation) / Death Pension / A.G.A. / Housebound, Document Verification, Exam, General Status, ITF/Generate ITF, ITF/ VA Form 23-0966, Income Adjustment, IVR, MOD Payments, Reconsideration Request, and Withdraw a Claim/Contention.

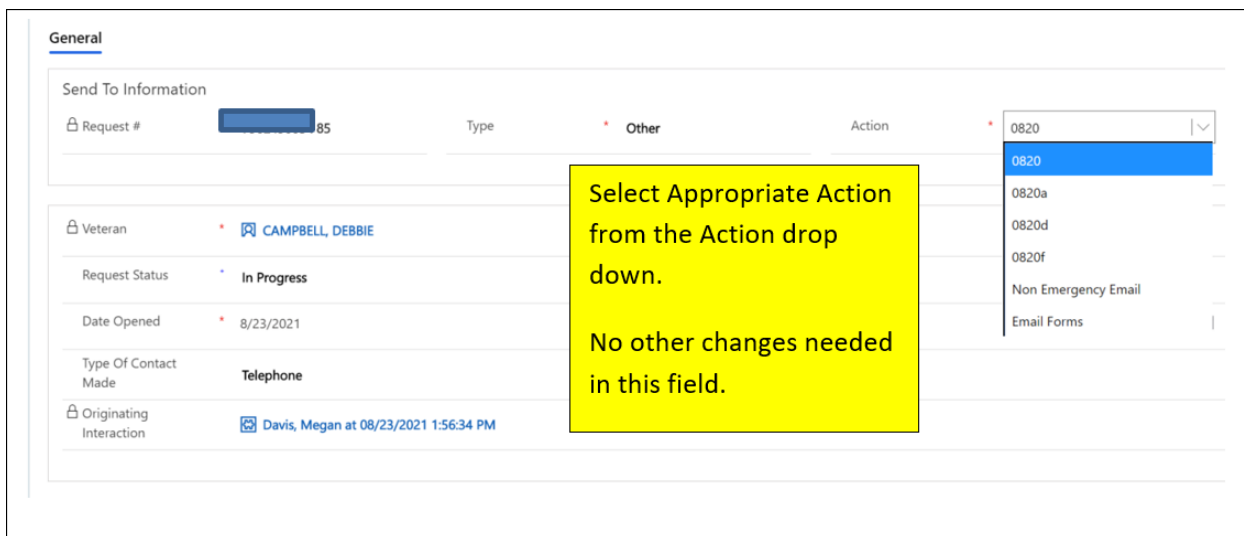
Select **Create Request**.

1. Navigate to the **Contact History** section and review past calls.
2. Select the **Actions** tab and select **Service Request**.

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3. Select the **Veteran** record from the Service Request- People List
4. The Service Request screen will open in a new window. Make sure the **Action** reflects intended service request



General

Send To Information

Request # [REDACTED] 85 Type * Other Action * 0820

Veteran * CAMPBELL, DEBBIE

Request Status * In Progress

Date Opened * 8/23/2021

Type Of Contact Made Telephone

Originating Interaction * Davis, Megan at 08/23/2021 1:56:34 PM

Select Appropriate Action from the Action drop down.
No other changes needed in this field.

5. In the **General** section:
 - Send To:** should show the Veteran/Beneficiary SOJ (refer to the Jurisdiction and Routing document in the Knowledge Management System as needed).
 - Send Email to Veteran:** Do NOT check
 - Email of Veteran:** No action/change
 - Letter Addressing:** Select Compensation or Pension
 - VBMS Upload Role:** Leave Blank
 - VBMS Doc Type:** Leave Blank

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6. In the Veteran Mailing Address Section:

Verify/complete **Mailing Address, Caller Information, Dependent Information,** and **Additional Information** as needed.

When completing a service-request, ensure the address and phone number on record is correct. Take action to update contact information when necessary in compliance with FOIA/PA regulations.

7. In the **Caller Information Field** select Copy Mailing Address *if caller is Veteran or has the same mailing Address of Veteran.*

Complete Caller Information field with Caller Address if address/phone number does not match the Veteran's address/phone number.

8. **Name of Reporting Individual** section, **verify Caller name if not the Veteran is in this section,** set **Read Script** to "Yes" to confirm Notice of Action has been provided to caller.

9. In the **Description of contents to be inserted in service request body** subsection, use **Quick Write** to populate the necessary information. Type in additional information as needed. Use "*" for wildcard search in Quick Write field.

PCRs may utilize Quick Writes (recommended when applicable) or type the body of the 0820 below.



Service Request Content Info

0820

Name of Reporting Individual	Read Script
Janet Moore	No

Description of contents to be inserted in service request body

Quick Write --

Click to activate Quick Write list

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Description of contents to be inserted in service request body

Quick Write	Description of contents to be inserted in service request body	Date
--	10 - Request for Application The claimant has stated he/she wants to file a claim for _____ benefits. I have explained to the claiman...	5/4/2015 9:36 AM
	11 - Appeal DRO Election The Veteran called to elect the DRO process for the NOD dated XX/XX/XXX. Please use the DRO process for this...	8/24/2011 4:29 PM
	12 - Appeal Traditional Election Veteran called to elect a traditional appeal. This is for the NOD dated XX/XX/XXXX. Please take appropriate actio...	7/23/2015 1:38 PM
	13 - Incarceration Veteran called to report that he has been incarcerated since (date) at the (Facility). His inmate number is (inmate...	11/15/2011 4:23 PM
	14 - Medical Records - VAMC Records The Veteran has received treatment for ___ at the ___ VAMC from ___ to ___. Please obtain records of this VAMC trea...	8/24/2011 4:21 PM
	15 - Medical Records - Private The Veteran has received treatment at ___ for this condition from ___ to ___. I have mailed the Veteran a 21-4142.	8/24/2011 4:24 PM
Date Opened	16 - Exam Reschedule The Veteran called to reschedule the ___ C&P appointment at _____ for the ___ claim cest'd _____. The Veteran mi...	8/24/2011 4:25 PM
Active	10 results	

b. Scroll down and select [Look Up More Records](#)

Quick Write	Description of contents to be inserted in service request body	Date
--	14 - Medical Records - VAMC Records The Veteran has received treatment for ___ at the ___ VAMC from ___ to ___. Please obtain records of this VAMC trea...	8/24/2011 4:21 PM
	15 - Medical Records - Private The Veteran has received treatment at ___ for this condition from ___ to ___. I have mailed the Veteran a 21-4142.	8/24/2011 4:24 PM
	16 - Exam Reschedule The Veteran called to reschedule the ___ C&P appointment at _____ for the ___ claim cest'd _____. The Veteran mi...	8/24/2011 4:25 PM
	17 - Transfer C-File The Veteran called to request that the Veteran's C-File be permanently transferred to the ___ Regional Office. The...	8/24/2011 4:34 PM
	18 - 5103 - 30 Days Additional Time The Veteran called in response to a (Date) 5103 letter for the Veteran's (EP DOC) claim. The Veteran is requesting...	8/24/2011 4:28 PM
	19 - 5103 - Additional Information The Veteran called in response to a (Date) 5103 letter for a (EP DOC) claim. The Veteran states:	8/24/2011 4:28 PM
Date Opened	Look Up More Records	
Active	10 results Look Up More Records	

c. Additional Quick Writes may be accessed by scrolling, or searching key words

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The screenshot shows a 'Look Up Record' window with the following elements:

- Header: 'Look Up Record' with a close button (X).
- Instruction: 'Enter your search criteria.'
- Search Fields:
 - 'Look for' dropdown menu set to 'Quick Write'.
 - 'Look in' dropdown menu set to 'Quick Write Lookup View'.
 - 'Search' text input field containing 'Search for records' and a magnifying glass icon.
- Checkbox: 'Show Only My Records' (unchecked).
- Table of Results:

Name ↑	Quick Write Text
IRIS-Property Tax Exemption Letter -...	Widow is requesting a property tax exemption let
IRIS-Status of Evidence	Veteran called to check status of evidence sent or
IRIS-Status of Hardship Request	Veteran called regarding the hardship status of hi
IRIS-Tracer Follow up	Tracer was submitted on (Date of Tracer) for (Dat
Letter - FNOD Letter - Non-Survivor/...	On behalf of the Department of Veterans Affairs,
Letter - FNOD Letter - Survivors Blan...	On behalf of the Department of Veterans Affairs,
Letter - Form Enclosed Blank Letter	Please find the requested form(s) enclosed. Pleas
- Page Navigation: '1 - 50 of 57 (1 selected)' and 'Page 1' with navigation arrows.
- Buttons: 'New', 'Add', 'Cancel', and 'Remove Value'.

- d. Double click selection, or select and hit the "Add" button.

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Look Up Record ×

Enter your search criteria.

Look for Show Only My Records

Look in

Search

Name ↑	Quick Write Text
Privacy Act Request	In response to the request received in our office, y
✓ Reconsideration request	Veteran called to request reconsideration of EP _
Removal of dependent	Veteran called in to remove the following depend
Remove Spouse - Death	The Veteran called to report the death of depend
Remove Spouse - Divorce	The Veteran called to report a divorce from the V
Resume Suspended Award	Please resume the Veteran's (Compensation/Pens
Suspended Payment	In response to the request received in our office, y

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- e. Fill in the blanks as appropriate to the situation, and according to the information in the file.

Description of contents to be inserted in service request body

Quick Write --

Veteran called to request reconsideration of EP ___ cest'd ___ and decided on _____. The Veteran will submit additional evidence to support this claim.

- i. Locate information within other tabs as necessary

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of Claim	Claim Status	Claim Description	EPC	Claimant First Name	Claimant Last Name	Payee Type Code
6/18/2018	CLR	PMC-Initial S/C Death	140	JANET		10
1/31/2018	CLR	631L Return of Dependency Verification Form	810	REGINALD		00
12/13/2017	CAN	Dependency Verification - 0538	130	REGINALD		00

11. Once the body of the 27-0820 is complete select Save

Unified Service Desk

VETERAN: [Name] [Close]

Document(s) exist in VBMS | VBMS

INT. HISTORY CLAIMS VBMS EFOLDER NOTES AWARDS VETERAN PROFILE **SERVICE REQUEST**

SAVE CANCEL CLOSE VBMS UPLOAD CREATE ANOTHER SERVICE REQUEST SEND EMAIL PREVIEW 0820 FLOAT

SERVICE REQUEST : INFORMATION

Action: 0820 Status: In Progress Veteran: [Name]

Copy Mailing Address

First Name	Last Name	Relation To Veteran	Spouse
Address 1	Address 2	Address 3	USA
City	State	Zip Code	Country
Phone	Email	Contact Prefix	

Service Request Content Info

0820

Name of Reporting Individual: [Name] Read Script: No

Description of contents to be inserted in service request body

Quick Write

Spouse of Deceased Veteran called to request reconsideration of EP 140 cest'd 06/18/2018 and decided on 08/23/18. The spouse [Name] has submitted the Death Certificate of her deceased husband as evidence to support this claim. She has made multiple attempts in faxing this information. She explains the death certificate for MD is such that it may not have transcribed properly in previous fax attempts. I confirmed she has the correct fax number. She made attempts to fax this May 1, and twice over the summer between June and August. Due to the recent notification letter, she attempted another fax yesterday 9/6/2018, and plans to reduce the size and fax again today. As back up she is also mailing a copy of this death certificate. Please reconsider Mrs. Moore's reconsideration of her DIC claim.

12. To review the 27-0820 for accuracy, select Preview 0820

INT. HISTORY CLAIMS VBMS EFOLDER NOTES AWARDS VETERAN PROFILE **SERVICE REQUEST**

SAVE CANCEL CLOSE VBMS UPLOAD CREATE ANOTHER SERVICE REQUEST SEND EMAIL **PREVIEW 0820** FLOAT

If edits on the service request screen are necessary, update, save again, and preview again.

13. To access the NOA statement, select Send Email

INT. HISTORY CLAIMS VBMS EFOLDER NOTES AWARDS VETERAN PROFILE **SERVICE REQUEST**

SAVE CANCEL CLOSE VBMS UPLOAD CREATE ANOTHER SERVICE REQUEST **SEND EMAIL** PREVIEW 0820 FLOAT

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14. To determine how the 27-0820 is to be routed, review [0820 Routing Procedures](#).

15. View notes and edit if necessary.