

Request to Add Dependent Job Aid

- ❑ Veterans in receipt of compensation who would like to add the following types of dependents can be processed under the following Customer Relationship Management Unified Desktop Optimization (CRM/UD-O) procedures:
 - Spouse
 - Minor biological child
 - Minor stepchild
- ❑ Veteran is rated 30% or more
- ❑ Dependent is not currently on the award

After completing the search and ID proofing for the Veteran inquirer, review the **Veteran Profile** tab to verify the dependent is not already on the award:

The screenshot displays the Unified Service Desk interface for a Veteran named IRA VRMHAYES. The interface is divided into several sections:

- Header:** Unified Service Desk with navigation options like CLOSE AND NEW CALL, NEW CALL, EMERGENCY, INT. HISTORY, VIEW CALL SCRIPT, ACTIONS, CLAIMS, AWARDS, PAYMENT, and ADDL. TABS (highlighted with a red box).
- Left Panel (Veteran Profile):** Contains personal and service information for IRA VRMHAYES, including SSN, Branch of Service (MARINES (M)), Station of Jurisdiction (317 - St. Petersburg), Character of Discharge (HON), POA (074 - AMERICAN LEGION), DOB (1/12/1923), Gender (M), and DOD. It also shows OGC Database Link, Flashes, Fiduciary Info, and S/C Combined Rating (40, highlighted with a red box). Other details include NSC Combined Degree (70), Award Type (CPL-Compensation/Pension Live), Pay Status (Authorized), Last Paid Date (12/1/2016), Amount (\$827.36), Next Scheduled Pay Date, Pending Claims (2 open claim(s)), Pending Appeals (0 pending appeal(s)), Mailing Address (1940 SERGEANT DR 127 CORNER OF TREE BLAINBURG WV WV 84222), Last Phone Call History (12/09/2016 1:00 PM Dependent Maintenance Add Spouse), and Status (Success).
- Center Panel (Interaction & Request):** Shows an interaction with Buono, John at 12/9/2016 11:00:26. It includes a table for Interaction Details with columns for Caller First Name (IRA), Caller Last Name (VRMHAYES), and No Phone # Avail. Below this are sections for Additional Details and General.
- Right Panel (Dropdown Menu):** A menu is open, listing various options like APPEALS, NOTES, MIL. HIST, RATINGS, DENIALS, VIRTUAL VA, EXAMS & APPTS, LEGACY PAYMENTS, BIRLS, INTERACTION, VETERAN PROFILE (highlighted with a red box), and VET. HISTORY.
- Bottom Panel:** Contains a list of links for Appeals, Claim, Correspondence and Forms, Dependent Maintenance, eBenefits, Fiduciary, FNOD, FOIA/Privacy Act, General Benefits Information for VBA, Ghost Call/Disconnected Call, Media Inquiries, General Benefits Information for VHA, and General Benefit Information For NCA. It also includes a Documents Verification section with links for General Status, SOC / SSOC Questions, Verify NOD / Form 9 received, and Withdraw Issue.

Request to Add Dependent Job Aid

Dependents on the Veteran's award are located in the **Dependents** tab:

The screenshot shows the VETERAN PROFILE page for IRA VRMHAYES. The 'Dependents' tab is highlighted with a red box. Below the tabs, a table lists the dependents with columns for Ptcpr ID, First, Middle, Last, SSN, SSN Verified Status, Related to Vet., Relationship, Proof of Dependency, Gender, Curr Relate Status, and DOB.

Ptcpr ID	First	Middle	Last	SSN	SSN Verified Status	Related to Vet.	Relationship	Proof of Dependency	Gender	Curr Relate Status	DOB
600075245	DOTTY	RUTH	VRMHAYES	555224426	N	N	Spouse				1/1/1966
600119069	CHILD		ONE	769873495	N	N	Child				11/29/2015
600121495	ELANA	J	JOSEP	123126565	N	N	Child				7/14/2015
600132127	DAVID		VRMHAYES	666442322	N	N	Child				3/1/2016
600132228	JUSTIN		VRMHAYES	777311122	N	N	Child				3/6/2016
600139321	SAMSUNG		VRMHAYES	666331212	N	N	Child				3/13/2016
600143791	COOKIE		HAYES	123145155	N	N	Child				7/1/2015

If the dependent is not listed on the Veteran's award, click on the **Interaction & Request** tab to initiate an interaction. Select **Dependent Maintenance**, select dependent **Sub Type**, and select **Create Request**:

The screenshot shows the Interaction & Request page for IRA VRMHAYES. The 'Interaction & Request' tab is highlighted with a red box. The 'Select Request Type' dropdown menu is open, and 'Dependent Maintenance' is selected. The 'Select Request Sub Type' dropdown menu is also open, and 'Add Minor Children' is selected. A 'Create Request' button is visible at the bottom.

Request to Add Dependent Job Aid

The Notice of Action (NOA) script must be read to the inquirer and populates before a dependent can be added:

VETERAN: IRA VRMHAYES

INT. HISTORY CLAIMS VETERAN PROFILE AWARDS PAYMENTS

CLOSE FLOAT

CONTACT: VETERAN PROFILE

VRMHAYES, IRA H.

Veteran Profile Interaction History Dependents Relationships Flashes POA Fiduciary

Dependents

Ptcpt ID	First	Middle	Last	SSN	Gender	Curr Relate Status	DOB
600075245	DOTTY	RUTH	VRMHAYES	555224426			1/1/1966
600119069	CHLD	ONE	VRMHAYES	769873495			11/29/2015
600121495	ELANA	J	JOSEP	123126565			7/14/2015
600132127	DAVID		VRMHAYES	666442322			3/1/2016
600132228	JUSTIN		VRMHAYES	777311122			3/6/2016
600139321	SAMSUNG		VRMHAYES	666331212			3/13/2016
600143791	COOKIE		HAYES	123145155	N	Child	7/1/2015

Message for the Caller

I am a VA employee who is authorized to receive or request evidentiary information or statements that may result in a change in your VA benefits. The primary purpose for gathering this information or statement is to make an eligibility determination. It is subject to verification through computer matching programs with other agencies.

OK

The **Dep. Main.** tab will open and display the **Dep. Maintenance** and **Dep. Main List.** **Dep. Main List** tab shows a list of actions associated with the Veteran:

Unified Service Desk CLOSE AND NEW CALL NEW CALL EMERGENCY INT. HISTORY VIEW CALL SCRIPT ACTIONS CLAIMS AWARDS PAYMENTS ADDL TABS

VETERAN: IRA VRMHAYES

INT. HISTORY VETERAN PROFILE **DEP. MAIN** AWARDS PAYMENTS CLAIMS

SUBMIT DEPENDENTS CANCEL CLOSE

DEP. MAINTENANCE DEP. MAIN LIST

SUBMIT DEPENDENTS CANCEL CLOSE

DEPENDENT MAINTENANCE: INFORMATION

VRMHAYES, IRA - Dependent Maintenance

General Information

Claim Date: 12/9/2016

Title: --

First Name: IRA Middle Name: HAMILTON Last Name: VRMHAYES

Suffix: JR

SSN: 666551414 DOB: 01/12/1923 VA File Number: 60002838

Day Time Phone: 8005551212 Night Time Phone: 855551212 Email: newemail@va.gov

Marital Information

Marital Status: Married Times Married: --

Last Name: VRMHAYES DOTTY 555224426 Y 8/27/2014 Marriage End... DOB: 1/1/1966

Activity Status: Open

Request to Add Dependent Job Aid

The **Marital Status** field is mandatory and must be filled in, even if a Spouse is not being added at point of call. Select the correct marital status from the popup menu:

VETERAN: IRA VRMHAYES x

INT. HISTORY VETERAN PROFILE DEP. MAIN. AWARDS PAYMENTS CLAIMS

SUBMIT DEPENDENTS CANCEL CLOSE

DEP. MAINTENANCE DEP. MAIN. LIST

SUBMIT DEPENDENTS CANCEL CLOSE

DEPENDENT MAINTENANCE : INFORMATION

VRMHAYES, IRA - Dependent Maintenance

General Information

Claim Date * 12/9/2016

Title --

First Name IRA Middle Name HAMILTON Last Name VRMHAYES

Suffix JR

SSN 666551414 DOB 01/12/1923 VA File Number 60002838

Day Time Phone 8005551212 Night Time Phone 8555551212 Email newemail@va.gov

Marital Information

Marital Status * Times Married --

Last Name Marriage End... DOB

VRMHAYES DOTTY 555224426 8/27/2014 1/1/1966

Activity Status **Open**

Open

Request to Add Dependent Job Aid

To add a new dependent, click on the plus (+) sign on the right side of the pane. Note – if the **Dependents** section is not visible, scroll down the tab or collapse the **General Information** and/or **Marital Information** sections until Dependents section is visible:

DEP. MAINTENANCE: INFORMATION
VRMHAYES, IRA - Dependent Maintenance

Dependents

SSN	First Name	Last Name	Dependent Relationsh...	DOB	Award In...	Maintenance...
123126565	ELANA	JOSEP	Dependent Child	7/14/2015	N	System
123145155	COOKIE	HAYES	Dependent Child	7/1/2015	Y	System
777311122	JUSTIN	VRMHAYES	Dependent Child	3/6/2016	Y	System
666331212	SAMSUNG	VRMHAYES	Dependent Child	3/13/2016	Y	System

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Summary of Actions

Veteran Address

Activity Status: **Open**

A **New Dependent** window will open. Fill all mandatory fields (*asterisk) and select **Save & Close**:

Unified Service Desk

Dependent: New Dependent - Microsoft Dynamics CRM - Internet Explorer

SAVE SAVE & CLOSE

DEPENDENT : IN Save and close this Dependent

New Dependent

Dependent Mainten: VRMHAYES, IRA - Dependent Maintenance

General

Dependent Relation: Dependent Child Maintenance Type * Add

Dependent General Information

SSN 123224567 DOB * 12/4/2016

First Name * John Middle Name N Last Name * VRMHayes

Dependent Child

Age 18-23 & In Schoc No Previously Married No

Relationship * Biological Seriously Disabled No

Child Place of Birth

City * Somewhere State * VA Country * USA

Child Current Address

Lives with Vet Yes Child Primary Phone --

Status Active

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The new dependent will be listed in the **Dependents** list as Add. Select the next page if the added dependent is not located on the first page:

Unified Service Desk

VETERAN: IRA VRMHAYES

INT. HISTORY VETERAN PROFILE DEP. MAIN. AWARDS PAYMENTS CLAIMS

SUBMIT DEPENDENTS CANCEL CLOSE

DEP. MAINTENANCE DEP. MAIN. LIST

SUBMIT DEPENDENTS CANCEL CLOSE

DEPENDENT MAINTENANCE : INFORMATION

VRMHAYES, IRA - Dependent Maintenance

Dependents

SSN	First Name	Last Name	Dependent Relationsh...	DOB	Award In...	Maintenance...
123224567	John	VRMHAYES	Dependent Child	12/4/2016		Add
666331212	SAMSUNG	VRMHAYES	Dependent Child	3/13/2016	Y	System
777311122	JUSTIN	VRMHAYES	Dependent Child	3/6/2016	Y	System
666442322	DAVID	VRMHAYES	Dependent Child	3/1/2016	Y	System

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Page 1

Summary of Actions

Veteran Address

Activity Status: Open

Unified Service Desk

VETERAN: RICHARD TYBB

INT. HISTORY DEP. MAIN.

SUBMIT DEPENDENTS CANCEL CLOSE

DEP. MAINTENANCE DEP. MAIN. LIST

SUBMIT DEPENDENTS CANCEL CLOSE

DEPENDENT MAINTENANCE : INFORMATION

Dependent Maintenance

General Information

Marital Information

Dependents

SSN	First Name	Last Name	Dependent Relationsh...	DOB	Award In...	Maintenance...
987654321	Mamma	Tybb	Spouse	1/1/1975		Add

5 - 5 of 5

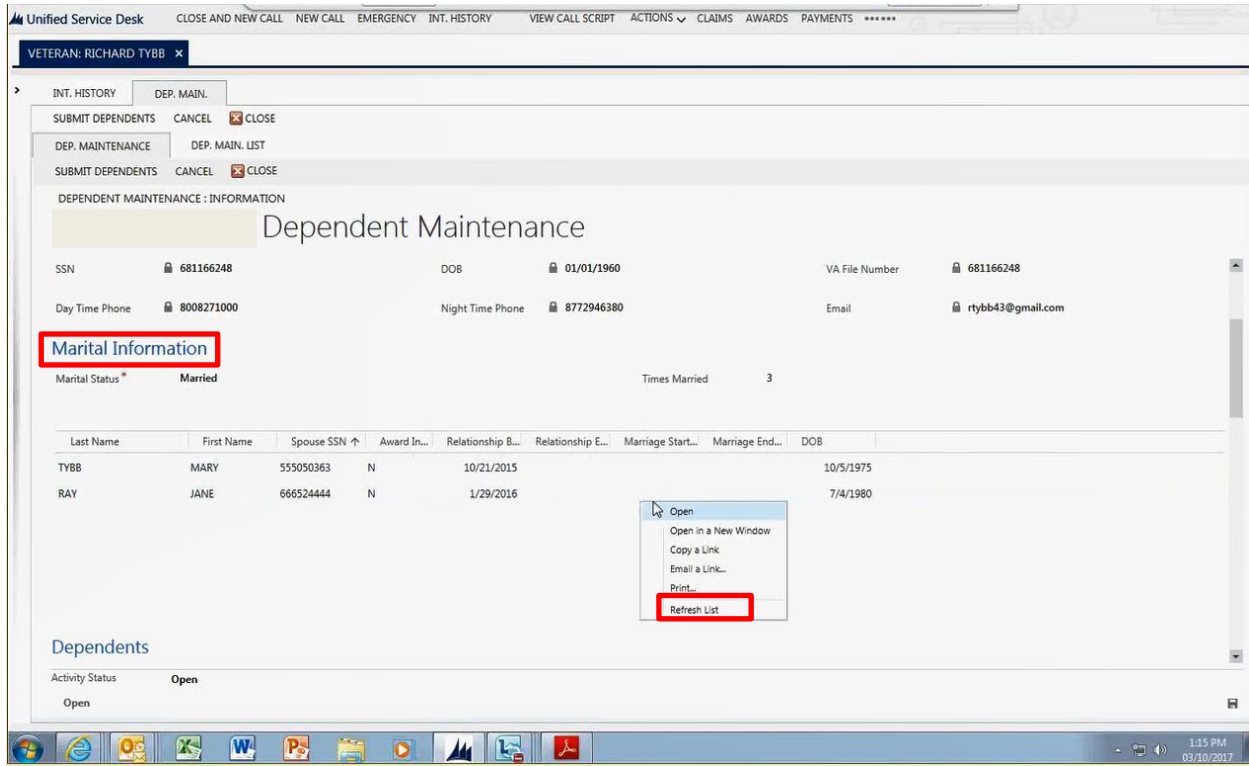
Page 2

Summary of Actions

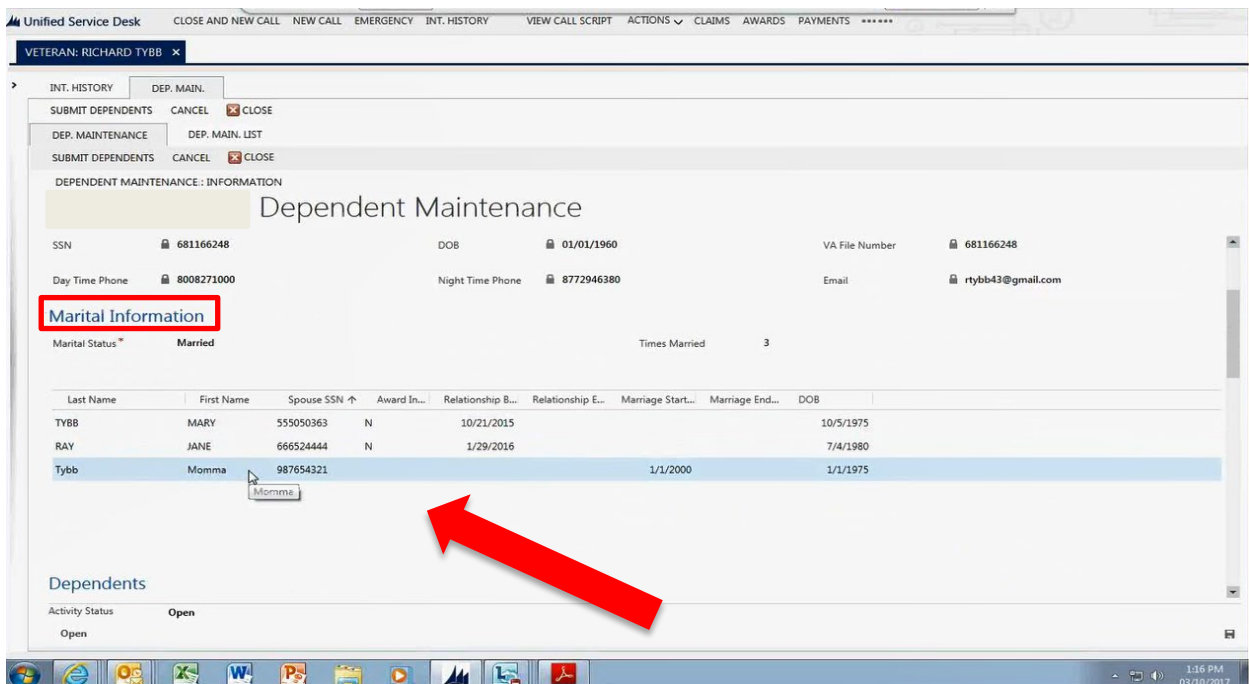
Activity Status: Open

Request to Add Dependent Job Aid

To add marital history for the newly added spouse, Right-click to select Refresh List or press F5 on keyboard in the **Marital Information** tab:

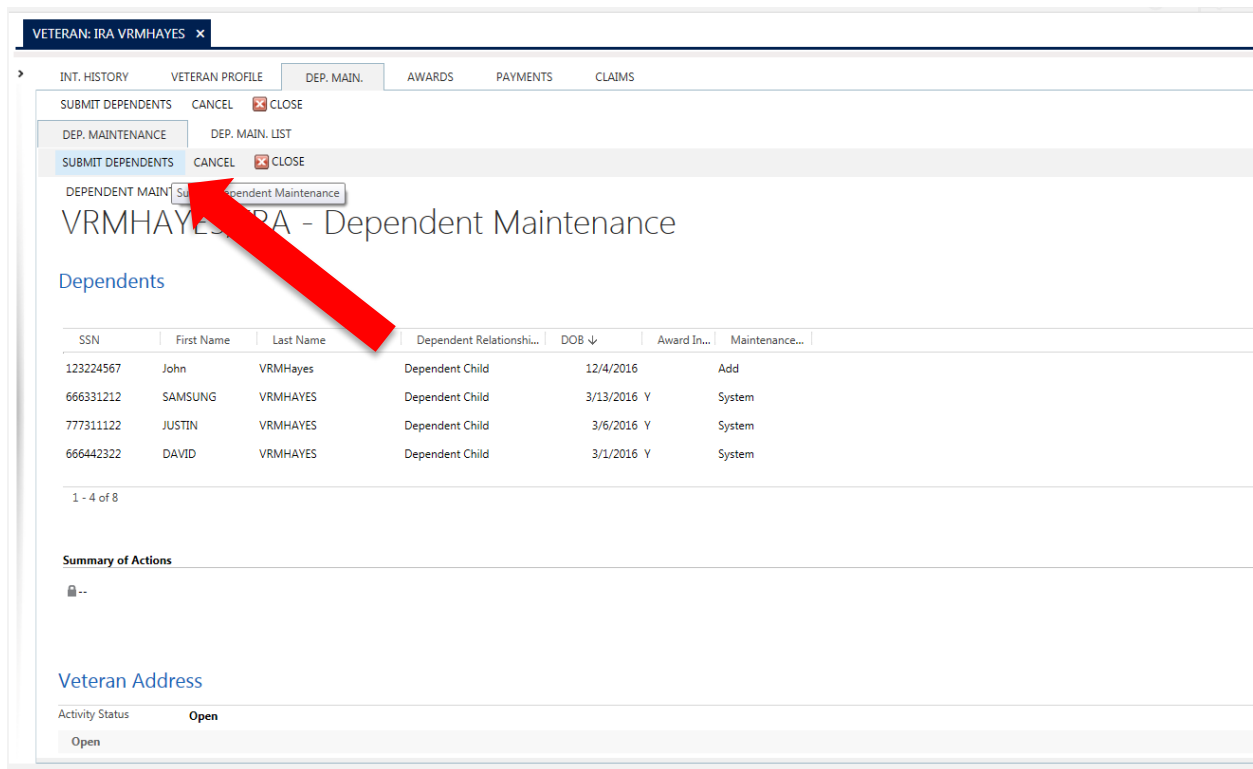


Double-click the spouse in the **Marital Information** tab to add previous marital history. Fill all mandatory fields and select **Save & Close** (as previously shown):



Request to Add Dependent Job Aid

After adding dependents, select the **Submit Dependents** tab:



VETERAN: IRA VRMHAYES x

INT. HISTORY VETERAN PROFILE DEP. MAIN. AWARDS PAYMENTS CLAIMS

SUBMIT DEPENDENTS CANCEL CLOSE

DEP. MAINTENANCE DEP. MAIN. LIST

SUBMIT DEPENDENTS CANCEL CLOSE

DEPENDENT MAIN | Submit Dependent Maintenance

VRMHAYES, IRA - Dependent Maintenance

Dependents

SSN	First Name	Last Name	Dependent Relationshi...	DOB ↓	Award In...	Maintenance...
123224567	John	VRMHAYES	Dependent Child	12/4/2016		Add
666331212	SAMSUNG	VRMHAYES	Dependent Child	3/13/2016	Y	System
777311122	JUSTIN	VRMHAYES	Dependent Child	3/6/2016	Y	System
666442322	DAVID	VRMHAYES	Dependent Child	3/1/2016	Y	System

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Summary of Actions

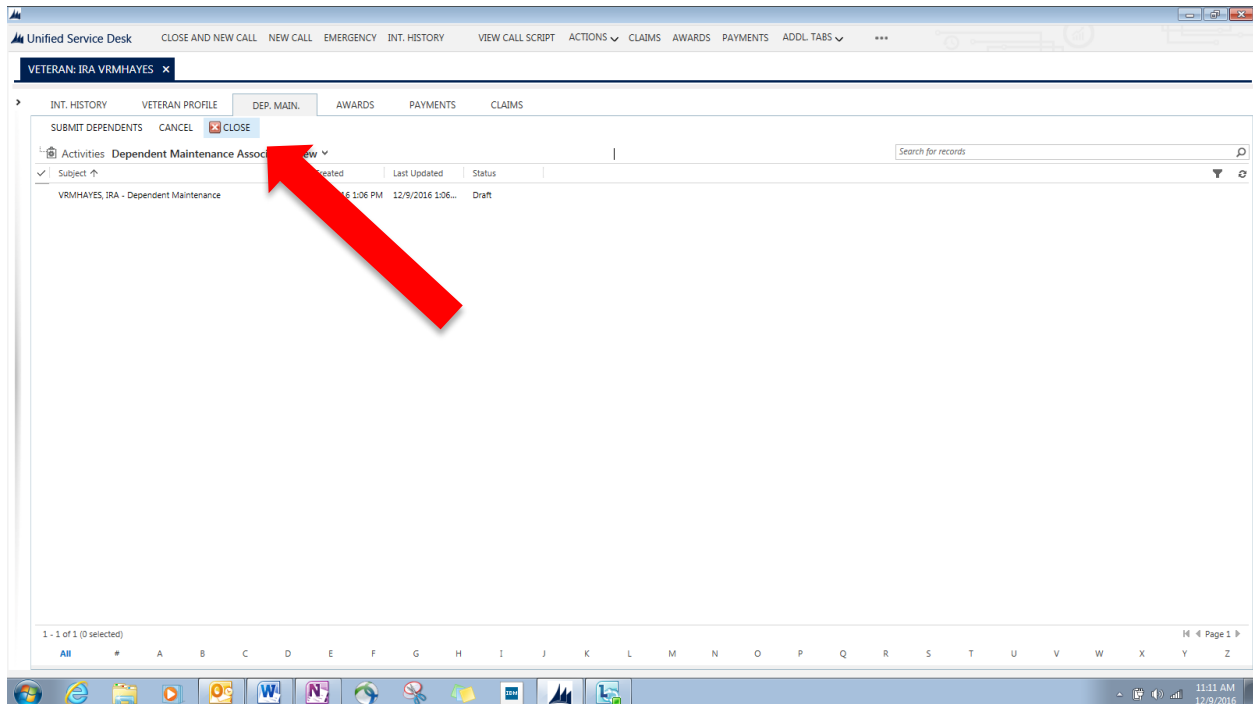
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Veteran Address

Activity Status **Open**

Open

Once all dependents are added, close the **Dep. Main** tab:



Unified Service Desk CLOSE AND NEW CALL NEW CALL EMERGENCY INT. HISTORY VIEW CALL SCRIPT ACTIONS ↓ CLAIMS AWARDS PAYMENTS ADDL TABS ↓ ...

VETERAN: IRA VRMHAYES x

INT. HISTORY VETERAN PROFILE DEP. MAIN. AWARDS PAYMENTS CLAIMS

SUBMIT DEPENDENTS CANCEL CLOSE

Activities: Dependent Maintenance Assoc. New

Subject ↑

Subject	Created	Last Updated	Status
VRMHAYES, IRA - Dependent Maintenance	12/9/2016 1:06 PM	12/9/2016 1:06...	Draft

1 - 1 of 1 (0 selected)

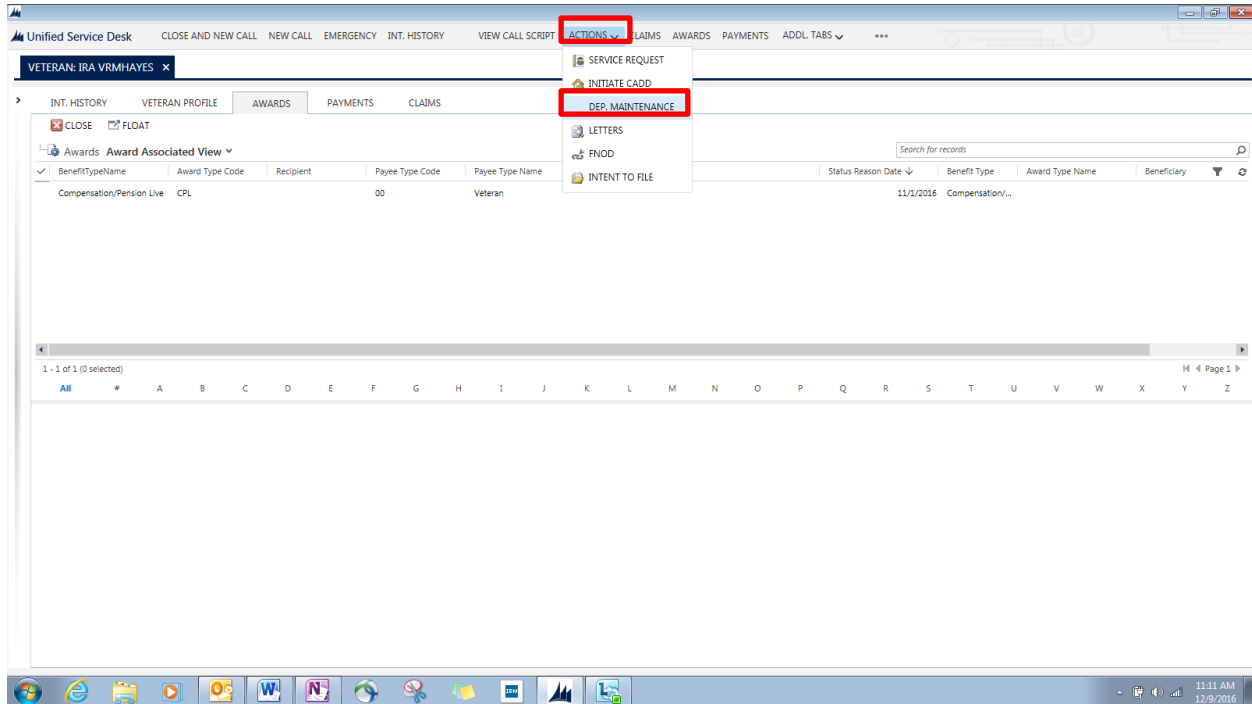
Page 1

AB * A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

11:11 AM 12/9/2016

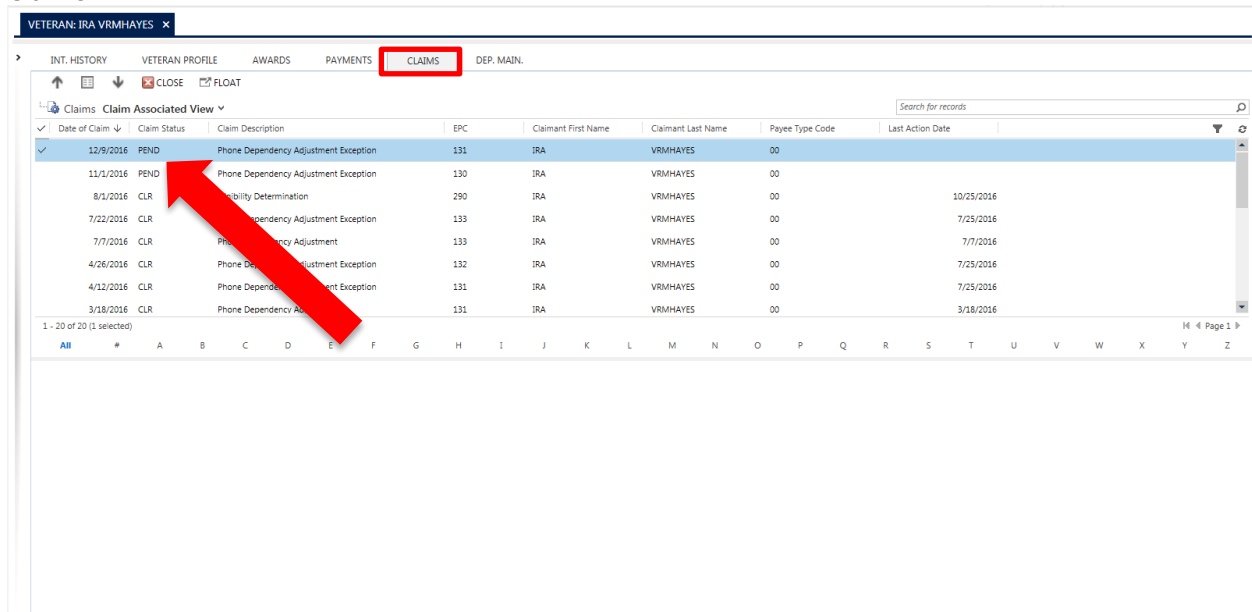
Request to Add Dependent Job Aid

If additional dependency interactions are required, return to the **Dep Main.** tab, and select **Actions** and **Dep. Maintenance**:



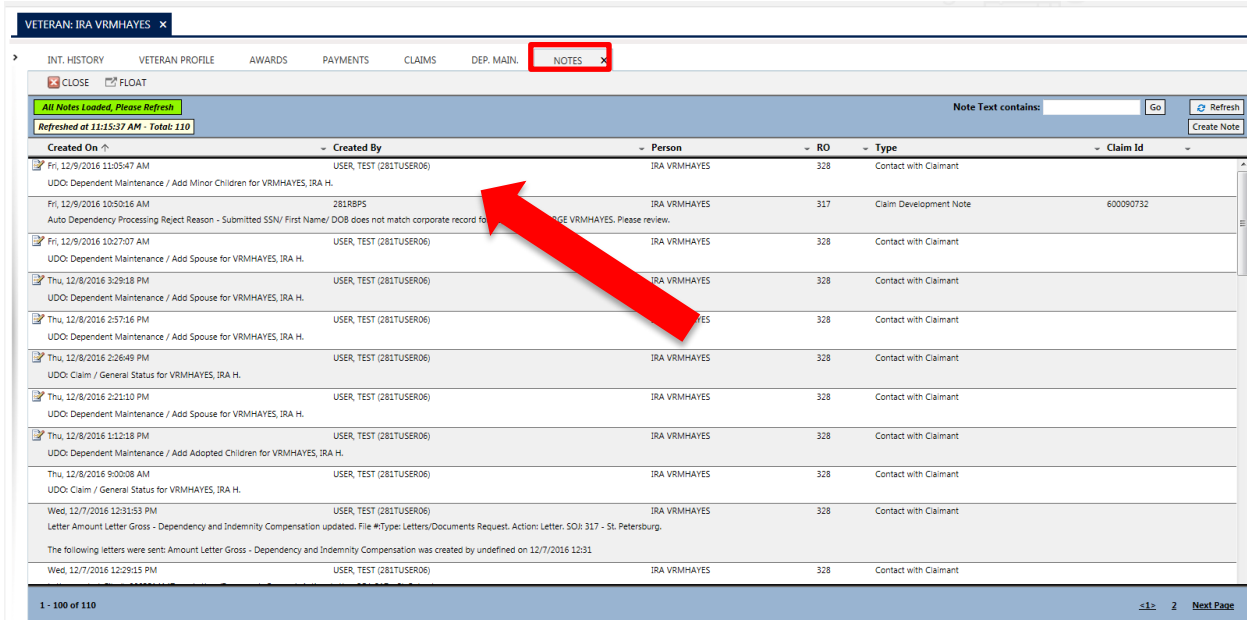
To confirm the dependent(s) were added successfully, check the **Claims** tab for a pending claim and/or **Notes** showing the action was entered:

Claims:



Request to Add Dependent Job Aid

Notes:



VETERAN: IRA VRMHAYES

INT. HISTORY VETERAN PROFILE AWARDS PAYMENTS CLAIMS DEP. MAIN **NOTES**

All Notes Loaded, Please Refresh
Refreshed at 11:25:37 AM - Total: 110

Note Text contains: Go Refresh Create Note

Created On	Created By	Person	RO	Type	Claim Id
Fri, 12/9/2016 11:05:47 AM UDO: Dependent Maintenance / Add Minor Children for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Fri, 12/9/2016 10:50:16 AM Auto Dependency Processing Reject Reason - Submitted SSN/ First Name/ DOB does not match corporate record for IRA VRMHAYES, Please review.	281RBP5	IRA VRMHAYES	317	Claim Development Note	600090732
Fri, 12/9/2016 10:27:07 AM UDO: Dependent Maintenance / Add Spouse for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Thu, 12/8/2016 3:29:18 PM UDO: Dependent Maintenance / Add Spouse for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Thu, 12/8/2016 2:57:16 PM UDO: Dependent Maintenance / Add Spouse for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	YES	328	Contact with Claimant	
Thu, 12/8/2016 2:26:49 PM UDO: Claim / General Status for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Thu, 12/8/2016 2:21:10 PM UDO: Dependent Maintenance / Add Spouse for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Thu, 12/8/2016 1:12:18 PM UDO: Dependent Maintenance / Add Adopted Children for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Thu, 12/8/2016 9:00:08 AM UDO: Claim / General Status for VRMHAYES, IRA H.	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Wed, 12/7/2016 12:31:53 PM Letter Amount Letter Gross - Dependency and Indemnity Compensation updated. File #Type: Letters/Documents Request. Action: Letter. SOI: 317 - St. Petersburg. The following letters were sent: Amount Letter Gross - Dependency and Indemnity Compensation was created by undefined on 12/7/2016 12:31	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	
Wed, 12/7/2016 12:29:13 PM	USER, TEST (281TUSER06)	IRA VRMHAYES	328	Contact with Claimant	

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Reminder: If a note did not populate in CRM/UD-O, a required note must be entered indicating a dependent was added (i.e. Added Spouse for Joe Veteran)

Request to Add Dependent Job Aid

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