

# Public Contact Team CRM/UD-O Training

**OFO-NCC** 

February 2022

- **Duration:** 4 hours
- **TMS:** TMS Survey will be completed at the end of Training for 35hr credit.
- Audience: This lesson trains Public Contact Representatives (PCRs) within the Public Contact Teams (PCTs) as they transition into Customer Relationship Management/Unified Desktop Optimized.
- **Purpose:** This lesson provides VA employees assisting the public an opportunity to refresh their knowledge on this topic. It fulfills the training requirement for experienced Public Contact Representatives.
- **Objectives:** Review the lesson objectives and assure students they will have opportunities to practice what they learn. Objectives should mirror SMART goals and be specific, measurable, achievable, realistic, and timely. All objectives must be covered in the lesson content.

Upon completing this lesson, trainees will gain basic understanding of the layout and functionality in CRM/UD-O, to include:

- Locating Information
- System Utilization

#### References: KM ARTICLE

- Identification (ID) Protocol
- Fiduciary Referral Procedures
- <u>Processing Requests for Documents in the eFolder -</u> <u>General Information and FAQs</u>
- Dependency Issues Procedural Changes and FAQs
- <u>Potential Incident/Privacy Violation Guidelines</u>
- <u>Agent Orange Exposure on C-123 Aircraft</u>

# Introduction

Public Contact Representatives (PCRs) in Regional Office Public Contact Teams (PCTs) have historically utilized a variety of programs to access information and tools to assist the public.

The PCT Customer Relationship Management/Unified Desktop-Optimized (CRM/UD-O), has been developed to improve efficiency and effectiveness of PCT activities by allowing PCRs to access information pulled from this variety of programs through one interactive system. CRM/UD-O allows PCRs to easily access information, update records, submit service requests, and assist PCT visitors without having to access several programs per interaction.

CRM/UD-O is a key part of the PCT Modernization Initiative that is underway to create an environment that provides the best support VA employees as they provide exceptional service to the Veteran Community.

## Accessing CRM/UD-O

1. Access the Windows icon at the bottom left of your computer screen.



2. Select the USD – UDO icon



3. The Unified Service Desk Box will appear. Select Change Credentials in the bottom right-hand corner.

#### **Unified Service Desk**



4. In the following screen match your system to the following:

Microsoft Dynam	ics 365	_ ×
Unified	Service Desk	
Login		
Deployment Type: Sign in as cu	On-premises Office 365	
<ul> <li>Display list o</li> <li>Show Advanced</li> </ul>	f available organizations ced	
Online Region	North America 2	~
User Name Password		
Login	Cancel	

Note: The only way to switch from one to the other is to log out, wait a moment, and log back in. Quickly select the <u>Change Credentials</u> link (see above) to change the Server to the other environment. Once established, all other fields will remain the same.

- 2. On the login screen, enter the following information to sign in:
  - Select Deployment Type Office 365
  - Check the box Sign in as current user
  - Check the box Display list of available organizations

- Check the box **Show Advanced**
- Select **North America 2** from the Online Region drop-down menu
- Click login.
- 3. Input your VA Email address on the sign in screen and click next
- 4. Click sign in as current user
- 5. Ensure you are in the Training environment



### Intake

We thoroughly reviewed the Intake process in an earlier lesson.

Activate your Queue tab in CRM/UD-O and double-click the line with the visitor's name to open the record for an interview.

INT. HISTORY QUEUES VETERAN PROFILE VET. HISTORY CLAIMS	
🔀 CLOSE 🛛 FLOAT 🕏 REFRESH	
[2] Show Chart 🖒 Refresh 🛱 Email a Link V 🗐 Run Report V 🛱 Excel Templates V 🕼 Export to Excel     [2]	💛 🛛 🖉 Import from Excel 🛛 🗸 🗟 Create view
Walk-Ins $\sim$	$ abla$ Search this view $oldsymbol{ ho}$
Queues I'm a member of V	
✓         Caller Last Nam ∨   Caller First Nam ∨   Entere ↑ ∨   Intake ID P ∨   Purpose of the Visit (Object) ∨	Has Sp $\downarrow$ $\checkmark$   Special Situations (Object) $\lor$

#### DEMONSTRATE

Accessing a Veteran's Record from the Queue in CRM/UD-O.

Click OK on the dialogue box directing you to retrieve the visitor from the waiting room.

The CRM/UD-O search is automatically conducted if the record had a Veteran's SSN.

If the SSN is not available, PCRs may conduct an alternate search; however, protected information may only be provided to verified individuals.

#### Veteran

If you are speaking with a Veteran, verify ID Protocol and then select "Identify Veteran and ID Proof Complete

VETERAN: MAYGER	ROZE ×												
VBMS													
Name: SSN / File Number: Branch Of Service: Station of Jurisdiction: Character of Discharge: Rank: POA: DOB: Gender:	MAYGER, ROZE AIR FORCE (AF) 317 - St. Petersburg HON 04/19/1945 F	¢	Veteral	INTERAC	TION & REQUEST	SEARCH							
DOD:			Section 1 -	Search B	y Traits								
OGC Database Link: Fidicuany Info:	OPEN LINK		*SSN	First		*Last	*N	lonth	*Dav	*Year			
Person/Org Name:													
S/C Combined Rating:	60			Roze	2	Mayger	04	1	19 /	1945			
NSC Combined Degree:	60												
Award Type:	CPL-Compensation/Pension Live		Search	Reset	Alternate Se	arch							
Pay Status:	Authorized		Scarch	Reset	Automate Se	arch							
Last Paid Date:	2/1/2018												
Amount:	\$1,026.00												
Next Scheduled Pay Date			Section 2 -	Search B	v EDIPI								
Next Amount:			00000002	000000	,								
Pending Claims:	4 open claim(s)												
Pending Appeals:	0 pending appeal(s)		*EDIPI										
Mailing Address:	53 PRAIRIEVIEW ALLEY LATHAM KS 67072												
Last Phone Call History:	04/26/2018 4:20 PM Update Information Address (CADD)												
Status:	Success REFRESH	]	Search	Reset									
			Section 3 -	Search Re	esults								
New Interaction			Your search in MV	I found 1 match	ning record(s).								
Hellol Please provide the ve	terang SSN	<u> </u>	SSN	First Name	Last Name	Date of Birth	Br. of Svc	Ran	Gender	Address	EDIPI	Sens. Level	Sc
Instantion					MAYGER	04/19/1945		-)	F			0	м
Instructions	ch tab and select the veteran				EIMATOER	201/15/1515		,				0	
Proceed to Caller Id	an and an an and a second a second second and an and a second a second a second a second a second a second a s		Identify Veter	an and ID Proc	of Complete	ID Proof Comp	ID Proof Fa	iled					

The Veteran's name and phone number will populate in details.

If there is no phone number of record, you will input a number in the Phone Number field and save.

**Note:** this will not change or update the phone number of record. To update a phone number of record comply with CADD/DD Procedures and Enhanced ID Protocol in KM article, <u>Identification (ID) Protocol</u>.



#### Non-Veteran Visitor

Non-Veteran visitors may include:

- Surviving Dependent
- Fiduciary
- Apportionee or Apportionee's parent/custodian/guardian etc.
- VSO
- Attorney
- Authorized Third Party (21-0845)

If you are speaking with a non-Veteran, verify if the individual is authorized to receive protected information, and verify ID Protocol. Then select "ID Proof Complete".

VETERAN: MAYGER	ROZE ×											
VBMS												
Name:	MAYGER ROZE	<	INT. HISTORY	INTERAC	TION & REQUEST	SEARCH						
SSN / File Number:												
Branch Of Service:	AIR FORCE (AF)											
Station of Jurisdiction:	317 - St. Petersburg											
Character of Discharge:	HON											
Rank:			Votoror	Coor	ch							
POA:			veterar	i Sear	CH							
DOB:	04/19/1945											
Gender:	F											
DOD:			Section 1 -	Search B	y Traits							
OGC Database Link:	OPEN LINK											
Fidicuary Info:			^SSN	First		^Last	· · · · · ·	Month	^Day	^Year		
Person/Org Name:									10 /	1045		
S/C Combined Rating:	60			Roze		Mayger		)4 /	19 /	1945		
NSC Combined Degree:	60											
Award Type:	CPL-Compensation/Pension	1 Live	Search	Reset	Alternate Se	arch						
Pay Status:	Authorized											
Last Paid Date:	2/1/2018											
Amount:	\$1,026.00		C	<	FRIDI							
Next Scheduled Pay Date:			Section 2 -	Search B	y EDIPI							
Next Amount:												
Pending Claims:	4 open claim(s)		*EDIDI									
Pending Appeals:	0 pending appeal(s)		COIFI									
Mailing Address:	67072	HAM KS										
Last Phone Call History:	04/26/2018 4:20 PM Update	e										
	Information Address (CADD	)	Search	Reset								
Status:	Success	EFRESH	oouron	nosor								
			Soction 3 - 9	Soarch Po	culto							
CALL SCRIPT			Section 5	Searchine	suits							
New Interaction		$\sim$	Your search in MVI	found 1 match	ing record(s).							
Hello! Please provide the ve	terans SSN		SSN	First Name	Last Name	Date of Birth	Br. of Svc	Ran	k Gender	Address EDI	PI Sens. Leve	al Sc
Instructions				ROZE 🗹	MAYGER	☑ 04/19/1945	AIR FORCE (	AF)	F		0	M
Search for the veteran in the Sear	ch tab and select the veteran.		Televelite Mart		£ C			F-31-1				
Proceed to Caller Id			Identify Vetera	n and ID Proc	or Complete	ID Proof Comp	ID Proof	Failed				

When the visitor is not the Veteran, you must fill in the Interaction Details. Complete the following in the Details Segment:

- Caller First Name
- Caller Last Name
- Phone Number
- Relationship
- You can select the field beside relationship to access the drop down, or
- You may navigate to Identify caller and the bottom, left of the screen to populate this field.
- Select Save

Unified Service Desk	CLOSE CALL	NEW CALL QUEUES EMER	GENCY INT. HISTORY VIEW CALL SCR			Ø	~
VETERAN: DITRAN	I, NICHOLAS						
Document(s) exist in V	BMS VBMS						
Name: SSN / File Number: Branch Of Service: Station of Jurisdiction: Character of Discharge: Rank: POA: DOB:	DITRANI, NICHOLAS ARMY: 101 HON 074 - AMERICAN LEGIC 4/1/1912	с ( ОN	INT. HISTORY QUEUES INT SAVE THIDE INTERACTION THE Davis, Megan at 09/08/202 Interaction - Information ~	RACTION & REQUEST	V REQUEST		
Gender: DOD:	M		Details				
OGC Database Link: Fiduciary Info: Person/Org Name S/C Combined Rating:	01/05/2021 OPEN LINK		Interaction Details Caller First Name NICHC	NAS			
NSC Combined Degree: Award Type:			Caller Last Name DITRA	NI			
Pay Status: Last Paid Date: Amount:			Relationship Vetera	n(Self)			
Next Scheduled Pay Date Next Amount:	e: O annan dalan(a)		No Phone # Avail.				
Pending Claims: Pending Appeals: Mailing Address:	0 pending appeal(s)		Appeals Modernization	*	Opt-in Letter	A	
Last Phone Call History:	37008 09/08/2021 8:12 AM G	eneral Benefits	Appeals BVA Appeal		General Inquiry Higher Level Review Update		
Status:	and Related Benefits Success	REFRESH	Contract Examinations Claim		NOD Update Supplemental Claim Update Withdraw Issue		1
			Dependent Maintenance eBenefits		Documents Verification		
CALL SCRIPT			Fiduciary		Claim Accuracy Request		
Next Steps		~	FNOD				
I have finished validating th I help you today? Instructions Usen to the callers request and 1) Pick the most appropriate req 2) Pick the most appropriate req 2) Cick on Create Request Unit The application will automatical request type and sub type select Initiate a New Request	he veteran details and cal quest type from the Request ta quest sub type from the reques n. by show you the most relevant ted.	ler details. How can b. it tab. data based on the	General Benefits Information f Ghost Call/Disconnected Call Hurricane Media Inquiries General Benefit Information Fo Giseneral Benefit Information Fo Mission Act Non VA Calls Novel Coronavirus	n VHA n NCA			
INT HISTORY	OUFUES	INTERACTION &	EQUECT				
INT. HISTORY	QUEUES IIDE INTERACTION	SHOW INTERACTION	DN DINITIATE A NEW REQUEST				
Interaction · In	information $\vee$						
Interaction	n Details						
Caller Firs	st Name	NICHOLAS	Caller Last Nam	DITRANI	Re	lationship	Veteran(Self)
No Phone	e # Avail.	0	Phone Number	(801) 222-5252			
White Ho	ouse Veteran		Opt-out of VBA Texts/Emails		Se	curity Pin	3332

# Categorization

A feature packaged within CRM/UD-O is the ability to categorize requests by topic. This feature provides data especially useful to identify our Veteran community's needs and frequency of specific needs. The data is often utilized to provide better service to Veterans and resources for PCRs. PCRs must categorize each request they receive.

Where we do have guidance that requires specific categorization in some scenarios, oftentimes we must categorize according to what is most closely related to the Veteran's request.

### **Guidance Requiring Specific Categorization**

The current guidance that requires specific categorization is as follows:

- <u>Fiduciary Referral Procedures</u>
- <u>Processing Requests for Documents in the eFolder General Information and FAQs</u>
- Dependency Issues Procedural Changes and FAQs
- <u>Potential Incident/Privacy Violation Guidelines</u>
- <u>Agent Orange Exposure on C-123 Aircraft</u>

### Practice

Proper categorization is more efficiently and accurately utilized when PCRs take a moment to learn the various *Request Type* and *Sub Type* options. With use, categorization will be completed effortlessly.

Take a moment to familiarize yourself with the Request Types and Request Sub Types. Notice how the Sub Type options change as various Request Types are selected.

#### **DEMONSTRATE** accessing various request types and sub types.

Select Request Type	Select Request Sub Type
Appeals Modernization Appeals BVA Appeal Contract Examinations Claim Correspondence and Forms Dependent Maintenance eBenefits Flduciary FNOD FNOD FNOD FNOD	Select Request Sub Type Create Request Opt-in Letter General Inquiry Higher Level Review Update NOD Update Supplemental Claim Update Withdraw Issue Documents Verification Explanation of Letter Claim Accuracy Request
Convintas y Rule General Benefits Information for VBA General Benefits Information for VHA General Benefits Information for VHA General Benefits Information For NCA Mission Act Norv VA Calls Novel Coronavirus Payments / Debts Potential Incident RAMP *	

### **Create Request**

Now that we are familiar with the selections,

- select the *Request Type* <u>Update Information</u> and
- Request Sub Type Address (CADD).
- select Create Request

### **Multiple Requests within One Interview**

Conversations often include multiple requests. For example, a Veteran may ask for the status of a claim, request to update his address, and then request a document within his eFolder. Each of these requests must be documented.

#### *How to Initiate Multiple Requests*

Select "Initiate a New Request" in the bottom left corner, to initiate additional requests.

	microsort cynamics ava		
Inified Service Desk	CLOSE CALL NEW CALL QUEUES	EMERGENCY INT. HISTORY VIEW CALL SCRIPT ACTIONS V *** ***	\$
VETERAN: DITRAN	, NICHOLAS		
Document(s) exist in VI	BMS VBMS		
Name:	DITRANL NICHOLAS	INT. HISTORY QUEUES CLAIMS VET. HISTORY	
SSN / File Number:		🔀 CLOSE 🗳 REFRESH 📑 FLOAT	
Branch Of Service:	ASM11:		
Station of Jurisdiction:	101	DITRANI NUCLICI AC	
Character of Discharge:	HON	DITRANI, NICHOLAS	
Rank		Contact - Vet History ~	
POA:	074 - AMERICAN LEGION		
DOB:	4/1/1912	Solicitation Phone Calls/Requests Service Requests ITE CADD Chat Loos	
Gender:	M	There easy requests server requests in CADD Char Edgs	
DOD:	01/05/2021		
OGC Database Link:	OPEN LINK	+ New Soli	titation
Fiduciary Info:			
Person/Org Name	¢	✓ Days Since Solic ✓ Solicitation Type ✓ Solicitation ↓ ✓ Relationship ✓ First Name ✓ Last Name ✓	PCR Name 🗸
S/C Combined Rating:			
NSC Combined Degree:			
Award Type:			
Pay Status:			
Last Paid Date:			
Amount:			
Next Scheduled Pay Date	r i i i i i i i i i i i i i i i i i i i		
Next Amount:			
Pending Claims:	0 open claim(s)		
Pending Appeals:	0 pending appeal(s)		
Mailing Address:	2540 SE MERIDIAN WAY MERIDIAN ID 37008		
Last Phone Call History:	09/08/2021 8:12 AM General Benefits Information for VBA Compensation and Related Benefits		
Status:	Success REFRESH		
ALL SCRIPT			
ext Steps	~		
ALL SCRIPT lext Steps have finished validating th help you today?	e veteran details and caller details. How fin		
ALL SCRIPT lext Steps have finished validating th help you today? sstructions	e veteran details and caller details. How on		
ALL SCRIPT iext Steps have finished validating th help you today? is structions sten to the callers request and Pick the most appropriate req Pick the most appropriate req	we veteran details and caller details. How on weiting the from the Report Line weight state wei such type from the results state.		

# **Quick View and Flashes**

Now that we have accessed a record, let's begin our exploration of the layout of CRM/UD-O. This system makes information within a record readily available with little to no searching.

In this segment we will review:

- Profile Quick View,
- Call Script, and
- Flashes

### **Profile Quick View**

Selected information extracted from a Veteran's electronic file is available in the quick view. This information assists PCRs in efficiently identifying Veterans and their representatives, and quickly answers common profile questions.

Name:	VRMHAYES IRA
SSN / File Number:	666551414 / 60006838
Branch Of Service:	MARINES (M)
Station of Jurisdiction:	317 - St. Petersburg
Character of Discharge:	HON
Rank:	
POA:	043 - SWORDS TO PLOWSHARES, VETERANS RIGHTS ORG, INC.
DOB:	1/12/1923
Gender:	M
DOD:	
OGC Database Link:	OPEN LINK
Fidicuary Info:	
Person/Org Name:	
S/C Combined Rating:	40
NSC Combined Degree:	70
Award Type:	CPL-Compensation/Pension Live
Pay Status:	Terminated
Last Paid Date:	6/1/2017
Amount:	\$830.12
Next Scheduled Pay Date:	
Next Amount:	
Pending Claims:	1 open claim(s)
Pending Appeals:	0 pending appeal(s)
Mailing Address:	1800 Jonathan Way # 3 Reston VA 20190
Last Phone Call History:	03/23/2018 10:10 AM Claim General Status
Status:	Success REFRESH

The quick view may be collapsed / expanded at any point during the conversation by selecting the arrow (<) in the top right corner.

### **Call Script**

The Call Script is at the bottom of the Profile Quick View. This provides information to assist you throughout your interaction.

CALL SCRIPT	
Next Steps 🗸	
I have finished validating the veteran details and caller details. How can I help you today?	
Instructions	
Listen to the callers request and 1) Pick the most appropriate request type from the Request tab. 2) Pick the most appropriate request sub type from the request tab. 3) Click on Create Request button. The application will automatically show you the most relevant data based on the request type and sub type selected.	
Initiate a New Request	
	-

### Flashes

Flashes appear as these blue buttons at the top of the screen and are visible throughout your interaction. May sure to review these flashes as they may contain critical information for your interaction.

For example, a "Potential Incident/ Fraud" flash impacts your ability to update contact and payment information.

VETERAN: VR	MHAYES, IRA ×						
Congressional	Disappearance of Veteran	Document(s) exist in VBMS	FBI Case	Formerly Homeless	Increase Referral Program	Office of Investigation, Central Office	Secret Service Case VBMS
		Trafar		tion V	N:+6:- 7	Taka	

# Information Within Tabs

We have already covered that call categorization accesses information pertaining to the request; however, this is not the only way to access information within a file. PCRs must categorize requests, but sometimes additional information must be reviewed to accurately respond to the request.

#### **Examples:**

- Status of Claim may require a review of Exams and Appointments, or
- Appeals status information may be found within the Claims tab (that pulls information from MAP-D)

Regardless of categorization, PCRs who have access to the information with in the tabs ribbon.

### **Tabs Ribbon**

Atop the CRM/UD-O screen, you will see a tabs ribbon. The tabs ribbon includes:

- Close and New Call
- New Call
- Emergency
- Int. History
- View Call Script
- Actions
- Claims
- Awards
- Payments
- Addl. Tabs
- Links
- Quick Actions

Unified Service Desk for Micro	soft Dynamics 365												
Unified Service Desk	CLOSE SESSION	NEW CALL	QUEUES	EMERGENCY	INT. HISTORY	VIEW CALL SCRIPT	ACTIONS 🗸	CLAIMS	AWARDS	PAYMENTS	ADDL. TABS 🗸	LINKS 🗸	QUICK ACTIONS 🗸

Depending on your screen resolution, you may not see all the tabs at the top of the ribbon, but rather in their place an ellipsis (three dots (...)). This represents multiple

tabs within a space too small to display. If this is the case, to access the tabs within click the ellipsis.

#### **Close Session**

Close Session completes and closes the interaction you are in. Close session will need to be selected at the completion of each interview.

#### New Call

The New Call button begins a new interaction.

#### Emergency

Emergencies include situations where someone threatens to harm themselves or someone else while speaking with you.

The Emergency tab provides quick access to information such as the Veteran National Suicide Prevention Hotline internal transfer and public number, and links to information such as suicidal guidance and bomb threat procedures.

#### **DEMONSTRATE & DISCUSS**

Lead class in discussion as to what emergencies may arise, and how your station supports PCRs in these situations.

CRM/UD-O provides an immediate means to contact support within your station by initiating a chat with the management team.

The emergency tab is always accessible in CRM/UD-O

#### Int. History

Int. History provides a brief history of records you have accessed.

#### View Call Script

This sometimes provides additional assistance to PCRs tailored to the last selected Request Type and Request Subtype.

Note: Not all categorizations have a script. We will revisit this when discussing the status of claims and appeals.

### Actions

Selecting Actions activates the actions PCRs may take upon an award, to include:

#### Service Requests:

- o **0820**
- o 0820a
- o 0820d
- o 0820f

- Non Emergency Email
- Email Forms

#### Initiate CADD

This option allows PCRs to change the contact and/or payment information for beneficiaries who pass identification protocol and enhanced identification protocol specific to his/her update request.

- PCRs can add or change the following within this selection:
  - mailing address
  - payment address (in rare circumstances payment is sent to a different address than mailing)
  - appeals record address (this must be updated with mailing address changes)
  - email address
  - phone number
  - direct deposit

#### Letters

PCRs create client requested letters for beneficiaries within CRM/UD-O with information within the beneficiary's record.

#### **FNOD**

The FNOD action is to only be utilized for the death of a Veteran. This selection allows PCRs to:

- Process a Veteran's First Notice of Death
- Process a Month of Death for a Surviving Spouse
- o Process 1 Presidential Memorial Certificate

#### Intent to File

PCRs can record a Veteran's or Survivor's intent to file within CRM/UD-O for the following benefits:

- Compensation
- o Pension
- Survivor's Pension and/or Dependency Indemnity Compensation (DIC)

#### **VBMS** Upload

Covered in 0820 Routing procedures.

#### **Dependency Maintenance**

Dependency Maintenance action is only activated if the request is appropriately categorized.

#### **Point of Interaction**

Covered in Point of Interaction procedures.

# Claims

Claims information is automatically accessed with the selection of the *Request Type* <u>Claim</u>. Claims information may also be accessed from the tabs ribbon. Depending on your resolution, you may see the Claims Tab at the top of your screen or the ellipsis which must be selected to display the claims tab.



aims							眼 See associated	record
							Search this view	
✓ Date of Claim ↓ $∨$	Claim Status $\lor$	Claim Description $\checkmark$	EPC 🗸	Claimant First Name $\vee$	Claimant Last Name $\vee$	Payee Type Code $\vee$	Last Action Date $\checkmark$	
2/10/2021	CAN	Phone Dependency Adjustmen	130	NICHOLAS	DITRANI	00	2/17/2021	
10/8/2020	CLR	Correspondence	400	DINA	DITRANI	10	10/9/2020	
3/10/2020	CAN	Phone Dependency Adjustmen	130	NICHOLAS	DITRANI	00	4/16/2020	
2/14/2020	CLR	Correspondence	400	NICHOLAS	DITRANI	00	2/14/2020	
2/3/2020	CLR	Request for Application	400	DINA	DITRANI	10	6/29/2020	
2/1/2020	CAN	Phone Dependency Adjustmen	131	NICHOLAS	DITRANI	00	2/3/2020	
1/12/2020	CAN	PMC-Dependency	130	NICHOLAS	DITRANI	00	2/3/2020	

#### **Customizing Lists**

Once the claims tab is activated, PCRs will see both pending and closed EPs. This page generally defaults to display items in order of date of claim with the most recent at the top; however, PCRs may customize viewings within CRM/UD-O.

List customization is available throughout CRM/UD-O (for example, within Appeals and Payments as well as Claims) to assist PCRs in ease of locating information.

You may review any list heading by alphabetical or numerical order by selecting the heading, or reverse order by selecting the heading twice.

**Example:** Click "Claim Status" this will rearrange the list alphabetically by claim status. Click "Claim Status" again. This moves the list in reverse-alphabetical order, pushing EPs that are not Cleared or Cancelled to the bottom, making it easier to

view pending items. You may also expand or contract any field by placing your cursor between the headings, clicking, and dragging to the desired width.

#### Accessing Details of a Claim

Double click on the claim in question to activate the sub tabs. You can also singleclick the hyperlink of the claim in the Claim Description column.

#### **Claims Details**

Provides general information regarding the selected claim to include the claimant's name, station working the claim, and current claim status

#### Life Cycle

Provides a brief history of the selected claim, and its current status.

#### Contentions

Provides the items listed on the claims. Whether or not this field is populated or not may lead to determining the current status.

#### **Tracked Items**

This tool is necessary when a claim is in the development phase. This section shows where VA is on obtaining information that has been solicited for the selected claim. Items that are considered pending tracked items (after thorough record review) must be discussed in cases where VA is awaiting the information.

#### Suspense

Suspense details provide information regarding the latest activity of a pending claim.

#### Evidence

Evidence tab provides a view of unsolicited evidence concerning 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.

#### **Claims Letters**

Development letters are letters that are 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.

#### **Script Buttons**

CRM/UD-O provides scripts to support the delivery of the status of claim. This will be covered more thoroughly in the Status of Claim segment of training.

## Awards

The Awards tab contains information pertaining to those with a VA award. Awards may be accessed from the tabs ribbon. Depending on your resolution, you may see

the Awards Tab at the top of your screen or the ellipsis which must be selected to display the Awards tab.



Within the Awards tab you will see a listing of beneficiaries on the award. Individuals who are in receipt or have received a recurring benefit from VBA may be seen on an awards tab.

This may include:

- Veteran
- Non-Veteran Beneficiary
  - Surviving Spouse
  - Surviving Child
  - Surviving Parent
- Apportionee

If the Veteran is the only beneficiary, this will be the only option available.

### **Only Veteran Beneficiary**

T. HISTO	RY QUEUES	INTERACTION &	REQUEST	AWARDS				
	RenofitTuneName V	Award Tune Code V	Peciniant ∨	Pauce Tune Code XX	Pavee Tune Name V	Votoran V	Status Reason	Bonofit Tuno 🗸
•	Compensation	CPL		00	Veteran		9/1/2021	Compensation.

#### **Multiple Beneficiaries**

INT. HISTO	DRY	QUEUES	INTERACTION & REQUEST	SEARCH	AWARD	s			
CLOSE	🤣 R	EFRESH 🛃 FLOAT							
									聘 See assoc
									Search this view
	$\bigcirc$	BenefitTypeName	<ul> <li>Award Type Code ~</li> </ul>	Recipient $\sim$		Payee Type Code $\sim$	Payee Type Name $\sim$	Veteran ~	Status Reason D $\downarrow$ $\checkmark$
		Primary Benefici	ary CPL	OJEDA JOSE	EPH E	00		OJEDA JOSEPH E	11/1/2013
		Primary Benefici	ary CPDS	OJEDA CELIA	A	10		OJEDA JOSEPH E	

Double click on the beneficiary in review to access awards information. This activates access to the following sub tabs:

- Award Details
- Fiduciary
- Award/Payment Adjustment

- Award Lines
- Income Summary
- Diaries
- Clothing Allowance

### **Payments**

rease Referral Proc	Iram	Office	of Investigatio	Deace Referra		0.66	of Investigatio
	AIMS DL. TA	AWARDS BS 🗸	PAYMENTS	ACTIONS ✓	CLAIMS	AWARDS	PAYMENTS

	n - 00			•									
												民 See	e associated reco
$\checkmark$ Pay Date $\checkmark$	$\mid$ Scheduled $\vee$	Authorized $\lor$	$\rm Amount \checkmark$	Recipient $\backsim$	Program Ty ~	Accoun V	Account Ty ~	Bank Name $\checkmark$	Routi 🗸	Payment Ty $\lor$	Payee Type $\checkmark$	Return Pay	✓ Payment ID ✓
9/7/2021	9/1/2021		\$352.84	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		804301118
9/1/2021	8/20/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		799176127
7/30/2021	7/20/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		792219895
7/1/2021	6/18/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		785775760
6/1/2021	5/19/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		779352415
4/30/2021	4/20/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		772955849
4/1/2021	3/22/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		766522725
3/1/2021	2/17/2021		\$7.90	JOSEPARRA	Compensa	292216	Savings	JPMORGAN CHASE	02100	Compensa	Veteran		760107904

The payments tab displays both scheduled (to be paid) and paid amounts sent to a beneficiary. The payee code defaults to Veteran – 00; and can be changed by selecting the drop-down arrow.

In this list of payments, you may view information such as: Pay Date

- Schedule Date
- Recipient
- Program Type
- Account Number
- Account Type
- Bank Name
- Routing Number
- Payment Type
- Return Payment
- Payment ID

• Payee Type

Double click on a payment to view that payment's summary.

#### **Payment Information**

Provides general information about the payment to include:

- Pay Date
- Amount
- Account Type
- Recipient
- Bank
- Program Type

#### **Payment Details**

Payment Details provides additional information about the payment to include:

- Gross Award/Payment Amount
- Award Effective Date
- Net Award/Payment Amount

#### **Payment Adjustments**

This tab displays any adjustments to the payment, such as a deduction to a payment due to a debt.

#### Award Adjustments

This tab displays award adjustments impacting the benefit.

### **Practice**

Review the information within the Payments Tab. Select a payment and review the information within a payment's summary. Note the information available in the following sub tabs:

- Payment Information
- Payment Details
- Payment Adjustments
- Award Adjustments

# **Additional Tabs**

Additional Tabs button also may either be visible on your top ribbon or accessible via the ellipsis after actions with Claims, Awards, and Payments. Claims, Awards, and Payments are CRM/UD-Os most frequently accessed tabs, which separates them from the rest; however, CRM/UD-O houses much more information than can fit across the ribbons tab.

Additional Tabs includes:

• Appeals

- Notes
- Military History
- Ratings
- Denials
- Exams & Appointments
- Legacy Payments
- BIRLS
- VBMS eFolder
- Interaction
- Veteran Profile
- Veteran History

	CLAIMS	AWARDS	PAYMENTS
--	--------	--------	----------

# Appeals

Appeals information may be accessed by categorizing the request type as Appeals. Appeals information is also accessible via the Appeals tab within Additional Tabs.

The Appeals tab displays current and historical appeals.

CLOSE 🗇 REFRESH 🗹 F	LOAT								
Appeals								ട See associated	record
								Search this view	ļ
$\checkmark$ Name † $\checkmark$	Status Code $\vee$	Status Description $\backsim$	Notice of Disagreem $\vee$	Decision Date $\sim$	Region Office Code $\smallsetminus$	Region Office Descri $ \lor  $ Action Type Code $ \lor $	Action Type	Descripti 🗸	
THOMPSON, B,	ACT	Active (Case at BVA)	2/20/2019		320	Nashville, TN 1	1 - Origina	al	
THOMPSON, B,	HIS	History (BVA actio	3/18/2008	2/28/2009	320	Nashville, TN 1	1 - Origina	al	

#### **Customizing Lists**

In the Claims segment, we reviewed Customizing Lists. This is especially useful in instances when locating an appeal and several active and historical appeals are of record.

Clicking on "Status Code" once, places the appeals in alphabetical order, making it easier to identify Active, Advanced, and CAVC status appeals.

Clicking "Status Code" again reorganizes the list of appeals in a reversealphabetical order, making it easier to identify appeals in Remand status.

Status Codes and Status Descriptions include:

ACT	Active (case at BVA)
ADV	Advanced (NOD Appeal Filed and/or on Docket—Case in
	RO)
CAV	CAVC (U.S. Court of Appeals for Veteran's Claims)
HIS	History (BVA action is complete and appeal is closed)

#### **REM** Remand (case has been Remanded to VBA)

#### Accessing Details of an Appeal

Double click on an appeal to further review it. This activates the appeal's information:

- Appeal Record
- Issues/Remand
- Diaries
- Decision/Special Contentions
- Appeal Dates
- Hearing Requests
- Appellant Info

#### Appeal Record

The appeal record subtab provides important information regarding the appeal such as:

- If a DRO has been elected, a date will be beside DRO Elected Date
- If the appeal is with the Court of Appeals for Veterans Claims (CAVC), Appeal Action Type and/or File Store Location Description may read COVA or CAVC.
- If a local review resulted in a denial or partial grant, the DRO Partial Grant/Denial Indicator will have either a P or D beside it
- If BVA has received the appeal, a BVA Received Date will have a date beside it
- If there is a Docket number, the number will be present by docket number

DRO ID			Docket #	File Store Loc Desc	81 Central Case	Storage	Svc Org Rec Date		
THE LIGHT PAR	2/20/2017	500	Hearing Ind	 Chrg to Current Location	8/5/2020		Docket Date	7/13/2020	Ē
DRO Partial Grant/Denial Ind	D		DRO Ready to Rate Indicator	 DRO Formal Hearing Ind			BVA Receive Date	8/5/2020	E
Appeal Action Type Desc	і - отупны								
Med Facility Code	5 <b>11</b> 1		Medical Facility Name						

Appeal Record	Issues/Remand	Diaries	Decision/Special Contentions	Appeal Dates	Hearing Request	Appellant Info

#### **Issues/Remand**

The Issues/Remand tab provides PCRs with the appealed issues. This tab is especially useful in occasions where more than one appeal is pending and the appellant refers to the appeal by a contention or issue within the appeal. For example, "What's the status of my PTSD appeal?"

Scroll down slightly to see the Remand segment which may have content pertaining to appeals in remand status. The "Reason Description" may provide clarification as to why an appeal was remanded.

sppeal Record Issues/Re	mand Diaries	Decision/Special Conte	entions Appeal Dat	es Hearing Request	Appellant Info				
Issues									
						🖒 Re	fresh 🔳 Run Report 🗸	$lag{u}$ Excel Templates $\sim$	6 1
✓ Sequence Number ↓	✓ Level 2 ✓	Issue Code Description $\vee$	Issue Description $\vee$	Program Description $\backsim$	Disposition Description $\vee$	Disposition Date $\checkmark$	Level 1 Description $\smallsetminus$	Level 3 Description $\smallsetminus$	
	7 Ankle, limite.	Increased rating		Compensation			Extraschedular		
	6 Ankle, limite.	Service connection		Compensation		200	All Others		
	5	Effective date		Compensation			Service connection		
	4	Effective date	1000	Compensation	1.777	0.000	Service connection	2007	
1 - 4 of 7								i← ← Page 1	$\rightarrow$

#### Diaries

Diaries display a listing of items to be completed within an appeal. Diaries include a combination of items for the appellant and individuals working on the case. Oftentimes diaries provide pertinent information in determining the appeal's status.

This list may be customized as well. Select "Status" twice to move all pending diaries to the top. Place your cursor on the line between "Req Activity Description" and "Response Notes Description", hold down a left click of the mouse and drag right to see the full description.

Look at the bottom right. If there is a blue arrow by the page number, there are more diaries.

						Ŭ F	lefresh 💷 Rur	n Report 🗸 🕴	狙 Excel Templates ~
Req Activity Description $\smallsetminus$	Response Notes Description $\backsim$	Diary Description $\vee$	Assigned To $ \smallsetminus $	Assigned $\downarrow$ $\checkmark$	Days to Complete $\checkmark$	Due Date $\searrow$	Closed Date $\lor$	Status 🗸	bva/ro $\sim$
cert	222	SENT TO AUTHORIZ	CERT	7/16/2020	7	7/23/2020	7/16/2020	Closed	RO
		READY TO RATE	DRO	7/16/2020	30	8/15/2020	7/16/2020	Closed	RO
		FORM 9 RECEIVED	VSR	7/13/2020	30	8/12/2020	7/16/2020	Closed	RO
SOC and deferred	2007	SENT TO AUTHORIZ	SOC	5/28/2020	7	6/4/2020	5/28/2020	Closed	RO

Appeal Record Issues/Remand Diaries Decision/Special Contentions Appeal Dates Hearing Request Appellant Info

#### **Appeals Dates**

Appeals dates provide a history of the appeal concerning some elements such as:

- Date of the notification letter of the original claim
- Date of Notice of Disagreement
- Date of SOC
- Date VA Form 9 was received
- Date the appeal was certified to BVA, etc.

Appeals dates can be arranged in date order by selecting the "date" field in both CRM/UD and CRM/UD-O.

Look at the bottom right. If there is a blue arrow by the page number, there are more dates available.

You may organize these by date order by selecting the date, and clicking again to bring the most recent to the top.

#### **Hearing Request**

Hearing request information, if available is located within this tab.

#### **Appellant Info**

The appellant's personal information is located in this tab.

#### **Script Buttons**

CRM/UD-O provides scripts to support the delivery of the status of an appeal. This will be covered more thoroughly in the Status of Appeal segment of training.

### Notes

System notes are located within the Notes tab. In CRM/UD-O PCRs can enter, edit, and review notes.

All Notes Loaded				Note Text contains:	Go	🔗 Ref
efreshed at 3:16:01 PM - Total: 600 - Filtered To	o: 502					Create N
Created On 个	<ul> <li>Created By</li> </ul>	- Person	→ RO	– Туре	<ul> <li>Claim Id</li> </ul>	~
Thu, 4/19/2018 2:53:28 PM UDO: Fiduciary / Fiduciary Issues requiring Transf	USER, TEST (281TUSER06) fer/VA for VRMMIDGET, MATTHEW	MATTHEW VRMMIDGET	328	Contact with Claimant		
Thu, 4/19/2018 2:40:40 PM Transferred by NWQ Job 900631 to RO 341	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Thu, 4/19/2018 2:40:40 PM Transferred by NWQ Job 900631 to RO 320	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	
Wed, 4/18/2018 10:19:10 PM Recalled to NWQ by Job 900473	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Wed, 4/18/2018 10:19:09 PM Recalled to NWQ by Job 900473	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	
Wed, 4/18/2018 2:41:46 PM Transferred by NWQ Job 900290 to RO 341	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Wed, 4/18/2018 2:41:46 PM Transferred by NWQ Job 900290 to RO 320	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	
Tue, 4/17/2018 10:12:58 PM Recalled to NWQ by Job 900274	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	
Tue, 4/17/2018 10:12:58 PM Recalled to NWQ by Job 900274	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Tue, 4/17/2018 2:42:03 PM Transferred by NWQ Job 900271 to RO 341	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Tue, 4/17/2018 2:42:02 PM Transferred by NWQ Job 900271 to RO 320	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	
Mon, 4/16/2018 10:14:50 PM Recalled to NWQ by Job 900151	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085781	
Mon, 4/16/2018 10:14:50 PM Recalled to NWQ by Job 900151	ACCOUNT, SYSTEM (NWQSYSACCT)	MATTHEW VRMMIDGET	283	Claim Development Note	600085771	

#### **Automated Notes**

The system has many functions that will automatically place a note for you. For example, when updating contact or payment information a note should be placed automatically by the system.

#### **Editing Notes**

note if necessary. Notes may only be edited by the person who creates the note, and notes cannot be edited the day after they are entered.

#### Searching Notes

Notes are easily searchable in CRM/UD-O. Notes are automatically organized in reverse date order with the most recent notes at the top. Enter text in the space by "Note Text Contains" and select "Go".

Note Text contains:	Go

Example: A PCR checking notes to see if there are any notes pertaining to a VA Form 21-0845, can search "0845" and all notes with 0845 will display.

#### Create a Note

To create a note, select the "Create Note" button in the top, right corner of the screen.



The "Create Note" box will pop up. The note will default to be for the Veteran; however, should the note be for another beneficiary, you may select the arrow down to select another beneficiary by "Add Note For".

Create Note	
Add Note for: (Veteran) IRA VRMHAYES	
	*
	Ŧ
	Cancel Ok

# **Military History**

A Veterans Branch of Service and Character of Discharge are provided in the Veteran's quick view in the left pane; however, this only provides information of the most recent tour of record. The Military History tab allows you to access more information for Veterans who have served multiple tours and/or multiple branches of service.

itary History	Summary										
ary Service r History Decc	orations Theat	res And POW Retireme	ent Pay Severa	ince pay Readi	ustment Pay	Separation I	Pay Military Person	s			
						,	.,,,				
come automotion in											
ourHistory									-	-	
ourHistory								🖒 Refresh	I Run R	eport 🗸 🖷	Excel Templates $ arsigma$
v Branch ∨	Other Branch $\checkmark$	Military Separation Reason $\sim$	Discharge V	Discharge Pay G \	<ul> <li>✓ Verified ✓</li> </ul>	Entered Active	$\sim$ Released Active Duty $\sim$	© Refresh Service Number ∨	1 Run R	eport 🏏 🖷	Excel Templates V
vurHistory ✓ Branch ✓ Air Force	Other Branch V	Military Separation Reason $\checkmark$ Satisfactory	Discharge V Honorable	Discharge Pay G \	< │ Verified 〜 Y	Entered Active >	Released Active Duty  06/02/1991	© Refresh Service Number ∨	1 III Run R	eport V 🕊 V Days Active V 1659	Excel Templates V
urHistory ✓ Branch ✓ Air Force	Other Branch V	Military Separation Reason $\checkmark$ Satisfactory	Discharge V Honorable	Discharge Pay G \	<   Verified ∨ Y	Entered Active >	<ul> <li>Released Active Duty </li> <li>06/02/1991</li> </ul>	© Refresh Service Number ∨	I Run R To↓ 1	eport V 🕊 V Days Active V 1659	Excel Templates V

# Ratings

A Veteran's service-connected and/or nonservice-connected rating information is available within the Ratings tab.

The ratings tab has the following subtabs:

- Disability Ratings
- Death Ratings
- Family Member Ratings
- SMC Ratings
- Other Ratings

igs Summary								
ility Ratings De	eath Ratings	Family Member Ra	tings SMC Ratir	ngs Other Ratings				
							🖒 Refres	h 🕫 See associated rea
✔ Begin Date ∨	End Date $\checkmark$	Combat Ind $\backsim$	Diagnostic $\downarrow$ $\vee$	Diagnostic $\checkmark$	Description $\lor$	Code $\downarrow$ $\checkmark$	Diagnostic Type $\checkmark$	Diagnostic Type Code $\vee$
08/26/2015		Ν	50	posttraumatic stress disorde	Service Connected	SVCCONNCT	Post traumatic stress disorder	9411
		11 C	20	s/n total knee replacement l	Service Connected	SVCCONNCT	Knee replacement	5055
10/30/2017		N	30	s/p total knee replacement i	Service Connected	57000141401	kilee replacement	5055
10/30/2017 10/30/2017		N	30	s/p total right knee replace	Service Connected	SVCCONNCT	Knee replacement	5055

# **Denials**

#### Denied claims are listed within the Denials tab.

INT. HIS	TORY QUEUES	INTERACTION & REQUE	ST SEARCH	APPEALS	MIL HISTORY	RATINGS	DENIALS					
CLOS	e 🕏 refresh 🖾 floa	AT.										
Denia	ls										B See associated rec	ords
											Search this view	Q
	$\prime$ Program Type Code $\sim$	Award Type $\checkmark$	Claim Date $\downarrow$ $\checkmark$	Claim Type $\smallsetminus$			Decisio	in Date $\smallsetminus$	Claim Type Code $\vee$	Decision Type $\vee$	Reason Preview $\smallsetminus$	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 Entitlement to an	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 The previous deni	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 Entitlement to an	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 Entitlement to an	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 Entitlement to an	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 Evaluation of resid	
	CPL	Compensation/Pe	10/12/2018	Reconsidera	ition		01/16	/2019	020	RATING	 The previous deni	

# **Exams and Appointments**

Oftentimes we see a pending DBQ or exam when providing the status of a claim or occasionally an appeal. CRM/UD-O allows you to access Examination and Appointment information with ease and efficiency.

#### **Exam and Appointment Summary**

Exam and Appointment

xams	5							
~	Ref # 🗸	Exam 🗸	Exam Description $\smallsetminus$	Date of $\downarrow ~ \lor$	Exam Place $\checkmark$	Status 🗸	Patient $\smallsetminus$	Request 25 🗸
	302232		DBQ MALE RE	6/30/2016	CLINIC	COMPLET		614
	413732		DBQ KIDNEY	12/21/2015	CLINIC	COMPLET		598
	410906		DBQ HAND A	11/12/2015	CLINIC	COMPLET		598
	410905		DBQ MALE RE	11/12/2015	CLINIC	COMPLET	0.777	598
	410908		DBQ REVIEW	11/12/2015	CLINIC	COMPLET		598
	410907		DBQ WRIST C	11/12/2015	CLINIC	COMPLET		598

# **Legacy Payments**

Legacy Payments tab displays payments that have been sent.

Upon selecting the Legacy Payments tab, you will see a list of payees on the award. Double click the payee in review. This activates the Legacy Payments Summary Subtabs:

- Payment Details
  - o Payee
  - Last Activity Date
  - File Number
- Payment Data
  - Type of Payment
  - o Amount
  - Pay Date
  - Paid By
    - C Corporate/ Vetsnet
    - B BDN
  - Where the payment was issued
  - The payment method, etc.

# Returned Payment Data Displaying any returned payments

Payments History							喝 See associated	record
							Search this view	
✓ Payee ✓	Last Activity Date $\backsim$	Prior Fich	ie Date † $\sim$	Last Fiche Date	~	Name $\sim$		
00	00/01/2021	05/01/	2009	05/01/2010		Legacy Paym	ent Summary	
CLOSE PAYMENT SCRIPT SCRIPT	PIS FOR C&P EDUCATION CUTOFF DATES							
CLOSE PAYMENT SCRIPT SCRIP	PTS FOR C&P EDUCATION CUTOFF DATES							
CLOSE PAYMENT SCRIPT SCRI Read-only. You don't have access to e regacy Payment Summia- gacy Payment History	PTS FOR C&P EDUCATION CUTOFF DATES dR this record.							
ICLOSE PAYMENT SCRIPT SCRI lead-only: You don't have access to e gacy Payment Summ. acy Payment History yment Details	PTS FOR C&P EDUCATION CUTOFF DATES dt this meand.							
CLOSE PAYMENT SCRIPT SCRIP lead-only: Vou don't have access to e gacy Payment Astrony yment Details File Number	PTS FOR C&P EDUCATION CUTOFF DATES dit this record. ary	Payce	00		Prior Fiche Date	05/01/2009		

### **BIRLS**

This tab accesses the BIRLS record with subtabs:

- Identification Data
- Military Service
- Alternate Names
- Insurance Policy
- Service Diagnostics
- Folder Locations
- Flashes
- Disclosures
- Misc 1
- Misc 2

## **VBMS eFolder**

Access documents within the VBMS eFolder.

INT. HISTORY CLAIMS	VBMS EFOLDER X	AWARDS	VETERAN PROFILE	SERVICE REQUEST NOTES S	SERVICE REQUEST - SELECT PERSON		
SLOSE 💱 REFRESH 🗠 FLOAT	er Associated View Y				Search for records		
Subject	Docu	ment Type		Document Version Ref Id	Receipt Date $\psi$	mime type	T
	Awar	d Print		(A3FFD408-D591-4612-8810-3C501966439	9F) 8/23/2018	application/pdf	
	Notif	ication Letter (e.g. VA	20-8993, VA 21-0290, PCGL)	{4E932A2A-75E7-4B03-95D7-1F297B6F95F	<sup>5</sup> 9} 8/23/2018	application/pdf	
	VA 2	1-0820 Report of Gene	eral Information	{15F2E973-60B8-4700-A2FB-2A27562BCD	E5} 7/30/2018	application/pdf	
	VA 2	1-0820 Report of Gene	eral Information	{293D1345-0AD3-41B6-B836-BE48838B2E	55} 7/30/2018	application/pdf	
	VA 2	1-0820 Report of Gene	eral Information	{C747B521-8763-4456-82A0-8000C14E1B0	08} 7/30/2018	application/pdf	
	MAP	-D Development Lette	r	{8B7DCD2F-B445-423F-80D1-A05B4061EF	4B} 7/20/2018	application/pdf	
534EZ	VA 2	1-534EZ Application fo	or Dependency and Indemnity	{A880487C-8AA8-471D-82C6-8A8F377C65	574} 6/26/2018	application/pdf	
	VA 2	1-534 Application for I	Dependency and Indemnity Co.	(B2DF547F-8A7F-4139-B098-C730BC10C8)	D8} 6/18/2018	application/pdf	
	Certi	ficate of Release or Dis	scharge From Active Duty (e.g	{3DB27198-852E-4EE8-9CE9-98495102EC0	F] 6/18/2018	application/pdf	
	Certi	ficate of Release or Dis	scharge From Active Duty (e.g	(BAF72E3F-65EE-49E3-A879-6EE28DE41C1	6/18/2018	application/pdf	
	VA 2	7-0820f Report of Mor	nth of Death	(40E1D63F-6810-4531-8E5A-014E80BBAC5	51) 5/22/2018	application/pdf	
27-0820a	VA 2	7-0820f Report of Mor	nth of Death	{2DD5715C-2F72-4CB6-B673-86EB9E0ED2	9D} 3/14/2018	application/pdf	
	VA 2	1-0538 Status of Depe	ndents Questionnaire	{EFF6E448-E745-4EF0-93E7-42B6E3670EB5	i) 12/13/2017	application/pdf	
	VA 2	1-0538 Status of Depe	ndents Questionnaire	{2A7E3965-8FF8-440D-B816-2322D7FB3B3	3A) 11/30/2017	application/pdf	
0820 TO SAH	VA 2	1-0820 Report of Gene	eral Information	{1967F5C1-01FF-4610-8AE9-3F01118E226	E} 6/5/2014	application/pdf	
RD 5/30/14 Award Letter	Notif	ication Letter (e.g. VA	20-8993, VA 21-0290, PCGL)	(4AB3F898-3DE0-4B48-A110-09D5581A0F	18) 6/4/2014	application/pdf	
	Awar	d Print		(255532DA-0F2B-4829-94D8-D44807C6D)	731) 6/4/2014	application/pdf	

# Interaction

Selecting this tab navigates back to conversation request categorizing. A new interaction within the Veteran's file can also be established here.

INT. HISTORY QUEUES	INTERACTION & REQUEST	SEARCH VET.	HISTORY				
at 09/	08/2021 10:10:29 AM						
nteraction $\cdot$ Information $\vee$							
Details							
White House Veteran Hotline		Op Tex	ot-out of VBA xts/Emails			Securit	y Pin
Additional Details							
Virtual Call	No	Caller Disconnected	No		Media Inquiry Call	No	
Is Abusive Caller	No	PCR Disconnected	No		NOA Statement	No	
Active							
		Vete	eran l	Prof	ile		
Veteran Profile	Interaction History	Dependents	Relationship	os	Flashes	POA	Fiduciary
he Veteran I	Profile subtal	hs include:					
Vetera	n Profile	bs meldde.					
<ul> <li>Interac</li> </ul>	tion History						
Depen	dents						
Relatio	nships						
Flashes	S.						

- POA
- Fiduciary

Much of the information available within the Veteran Profile tab is also visible in the Profile Quick View. The Dependents and Relationships tabs are especially useful when verifying dependents of record.

# **Veteran History**

Solicitation Phone Calls/Requests Service Requests ITF CADD Chat Logs Dependent Maintenance FNOD POI

The Veteran History tab provides information on previous actions taken within the award.

The Veteran History subtabs include:

- Solicitation
- Phone Calls/ Requests
- Service Requests
- ITF
- CADD
- Chat Logs
- Dependent Maintenance
- FNOD
- POI

# Links

#### VA Link

- VRM Links
  - Provides quick access to some of the resources PCRs frequently utilize.
- Available Call Scripts by Issue Type
  - Provides access to some of the scripts available within CRM/UD-O.

# **Quick Actions**

Quick actions may be necessary to flag certain types of calls. The Quick Action options are

- Abusive Caller
- PCR Disconnected Call
- Caller Disconnected
- Virtual Call

#### C&P Script

Quick link to Cutoff Dates to Change C&P Payment Method in Knowledge Management (KM). This is also accessible on Payment Details and Legacy Payments tabs.

#### **Pension Calculator**

Currently not activated.

#### Education

Links to the Cutoff Dates to Change Education Recurring Payment Method. This is also accessible on Payment Details and Legacy Payments tabs.

#### Announcements

Activates the announcements seen when originally logging into CRM/UD-O.

#### Dashboard

This tab displays any dashboards you may have access to.

## **Other Programs**

All we have discussed in this lesson pertains to CRM/UD-O; however, there are other programs that will be used by PCRs as well.

Briefly describe the following, and when PCRs will utilize these resources in addition to CRM:

- IRIS
- Contracted Exams Information
- And references such as KM, CPKM, etc.

# **Practice UDO Scavenger Hunt**

Using examples file numbers go through these questions as a guide to get you more comfortable in navigating through UDO. Please answer the following questions using the information available in UDO.

- 1. What is the name of the Veteran?
- 2. Is there a C# and SSN? If so, what is the C#?
- 3. Does the Veteran have a POA?
- 4. What Flashes are on the file?
- 5. What ROJ has jurisdiction on the Veteran's file?
- 6. Does the Veteran have a Fiduciary?
- 7. Does the Veteran have any claims pending? If so, what is the EP code?
- 8. Does the Veteran have any appeals? What is the date of the NOD?

- 9. Is Veteran getting benefits Direct Deposit or Paper Check?
- 10.Is the Veteran in receipt of Retired Pay, Severance/Separation? If so, what is the amount?
- 11.Is the Veteran receiving an award from VA?
- 12. What is the Veteran's current disability rate?
- 13. What is the Veteran's payment amount?
- 14. Does the Veteran have any dependents?
- 15.Is the Veteran in receipt of any SMC?
- 16.Is the Veteran P&T? IU?
- **17.** Does the Veteran have any debts?

Group	SSN	First Name	Last Name	BOS	DOB
1	796330163	Jesse	George	AF	01/31/1950
2	796249005	Debbie	Campbell	Army	07/26/1963
3	742341006	Teddy	Lemp	AF	09/14/1967
4	796126772	Jim	Holt	AF	07/12/1924
5	796147571	Carl	Jensen	Army	03/27/1987
6	796083300	Edgar	Powell	AF	07/05/1947
7	796131729	Jeffery	Haves	Army	09/25/1937
8	796131729	Jeffery	Hayes	Army	09/25/1937
9	742341004	, Mark	, Nait	Army	07/08/1973
10	742341005	Larry	Gaffner	Navy	03/19/1947
11	796047764	Albert	Powell	Navy	09/22/1948
12	742341003	Brett	Pippin	Marine	03/04/1975

#### **Customer Service Tips**

- Use everyday language when talking with clients. Remember, they are not VA employees and may not know what a DD214, 21-526, Triage, Rating Board, or authorization means. Bottom line do not use *jargon* to include VA *jargon* in talking with the caller. Give information to the caller at a level they can understand without talking down to the caller.
- First and foremost, give our clients the courtesy and respect they deserve. Be professional and use professional terms (not jargon) when talking. Leaving callers on hold for long periods of time, during phone interactions, is not courteous. Not asking permission to step away from the interview or place a caller on hold is unprofessional. Using *street slang* is also not professional. Give the client the care and understanding they deserve. *You* would expect the same if you contacted your local bank, health insurance company, or favorite restaurant.
- Before you end the interview, make sure you answered all the *directly asked* and *implied* questions that the client may have. For example, if the caller calls to report the death of a Veteran, not only do you take a report of death action, you also anticipate implied questions he/she may not have thought to ask such as burial benefits, widow benefits, headstone marker, flag, PMC, burial in a National/State cemetery, etc.
- Finally, to have a proper closing, you must ask, *Is there anything else I can help you with today*? This closing is required even if the interaction is very short. Always end your interviews or calls with goodbye, bye, or bye, bye. Do not end your contacts with *street slang* such as *later* or *uh huh*. Also, remember to use an appropriate empathetic closing on recent deaths. This would be the one instance you would <u>NOT</u> end the interaction with "have a nice day".

#### Helpful Hints and Tips

- When conducting interviews with clients, write down the Veteran's claim or SSN, and/or name. You will want to keep track of your work, and this helps you eliminate the need for asking the client the same information more than once.
- We don't expect you to know everything, but we do want you to be organized. We are providing ways for you to find the answer, whether electronically or by paper. The electronic online method has the most current up-to-date information. Some people have very good organizational skills, while others are still working on those skills.