CRM/UD-O Overview

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

Introduction

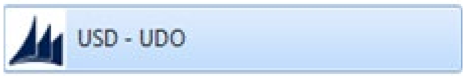
Public Contact Representatives (PCRs) in Regional Office Public Contact Teams (PCTs) have historically utilized a variety of programs to access information and tools to assist the public.

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.

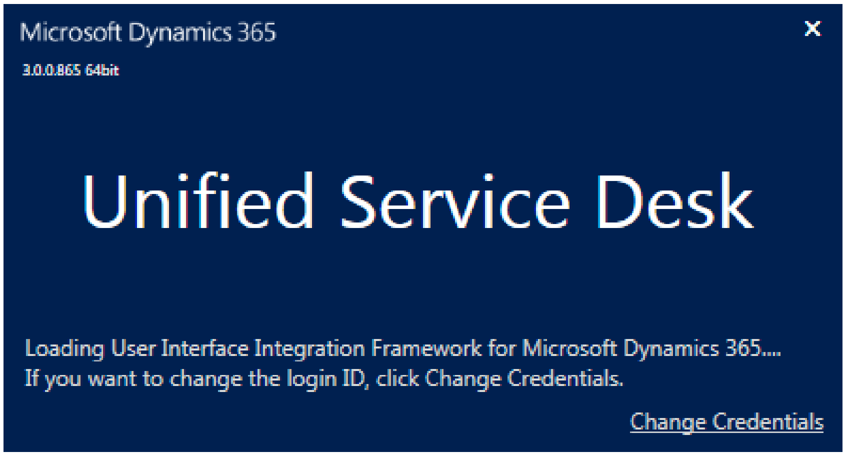
Accessing CRM/UD-O

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

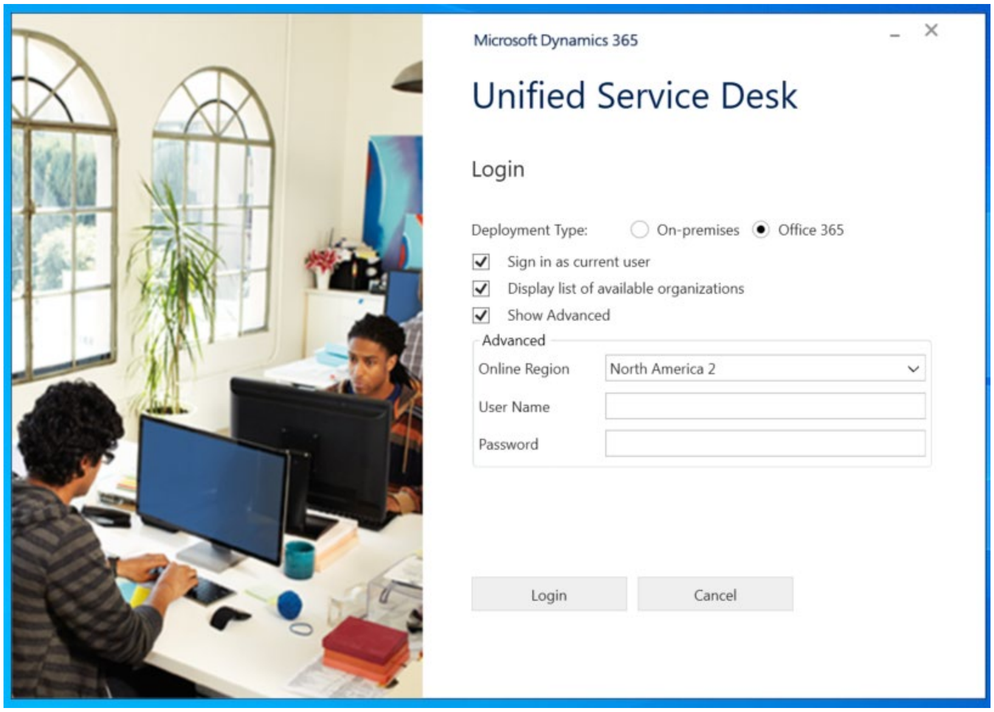
2. Select the *USD – UDO* icon


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:

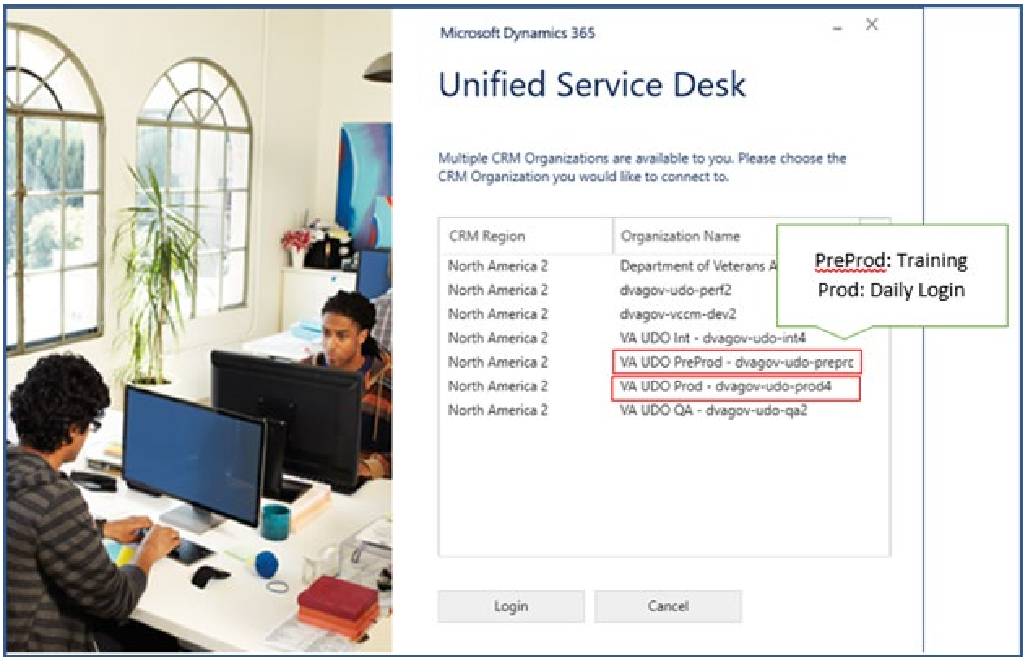


Note: The only way to switch from one to the other is to log out, wait a moment, and log back in. Quickly select the Change Credentials link (see above) to change the Server to the other environment. Once established, all other fields will remain the same.

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**.

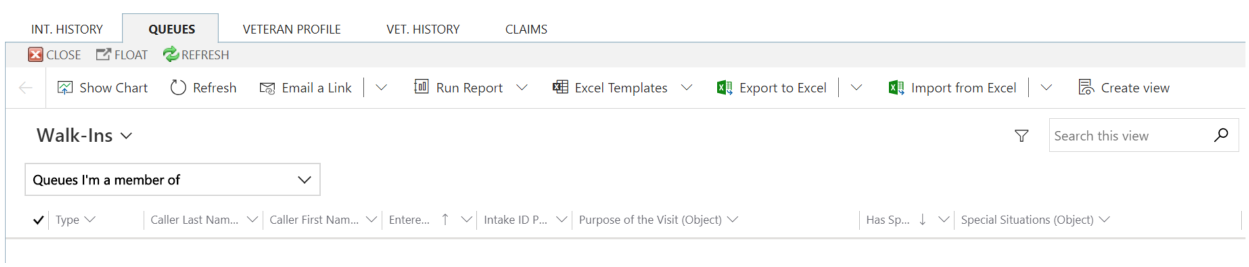
3. Input your VA Email address on the sign in screen and click next
4. Click sign in as current user
5. Ensure you are in the Training environment



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.



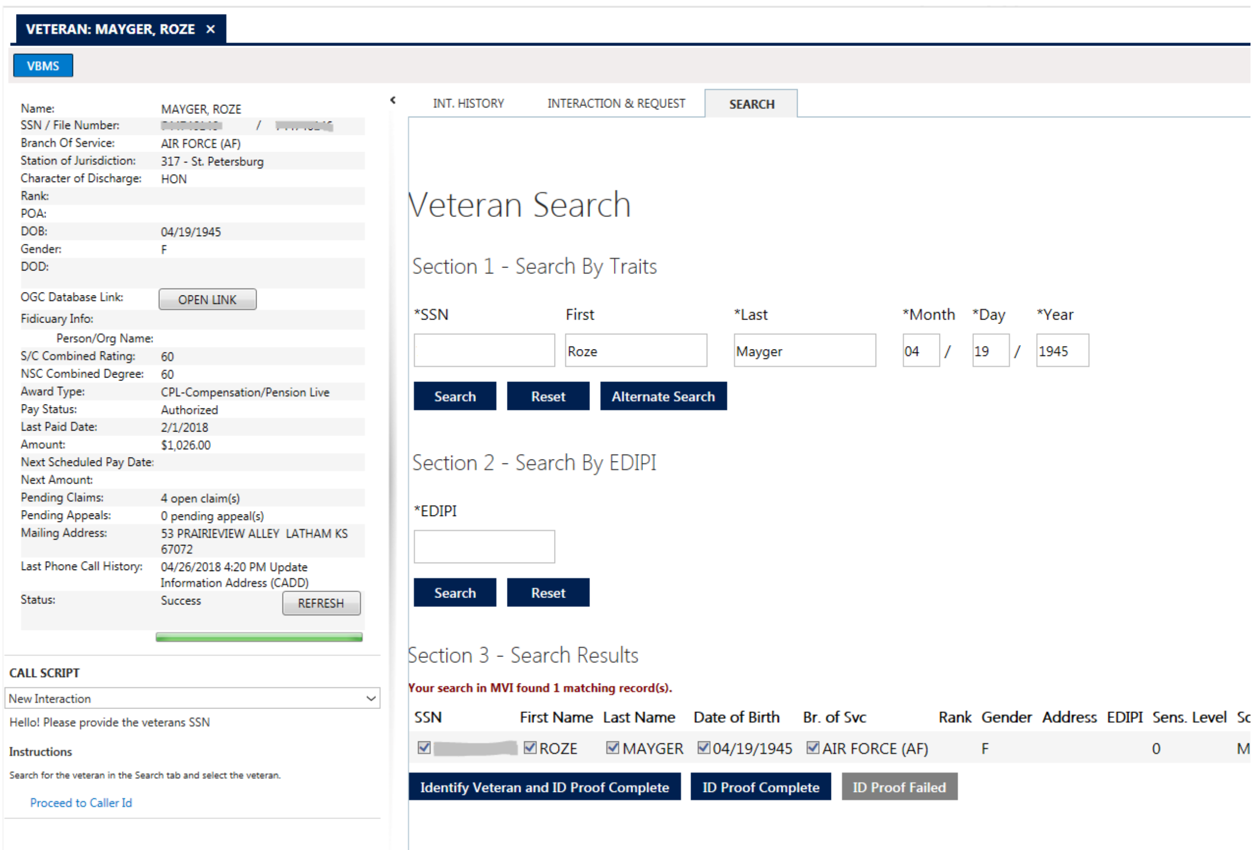
DEMONSTRATE
Accessing a Veteran's Record from the Queue in CRM/UD-O.

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

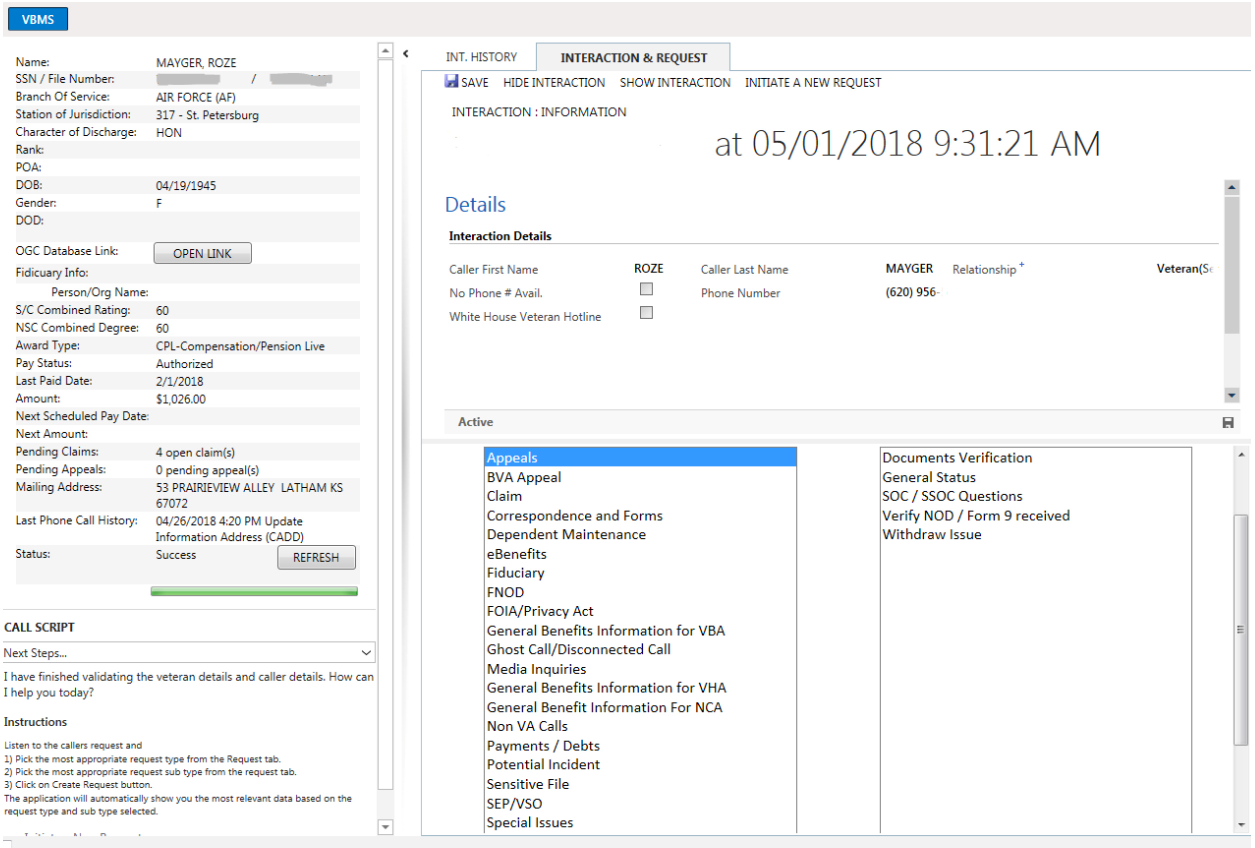
If you are speaking with a Veteran, verify ID Protocol and then select "Identify Veteran and ID Proof Complete



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, [Identification (ID) Protocol.]

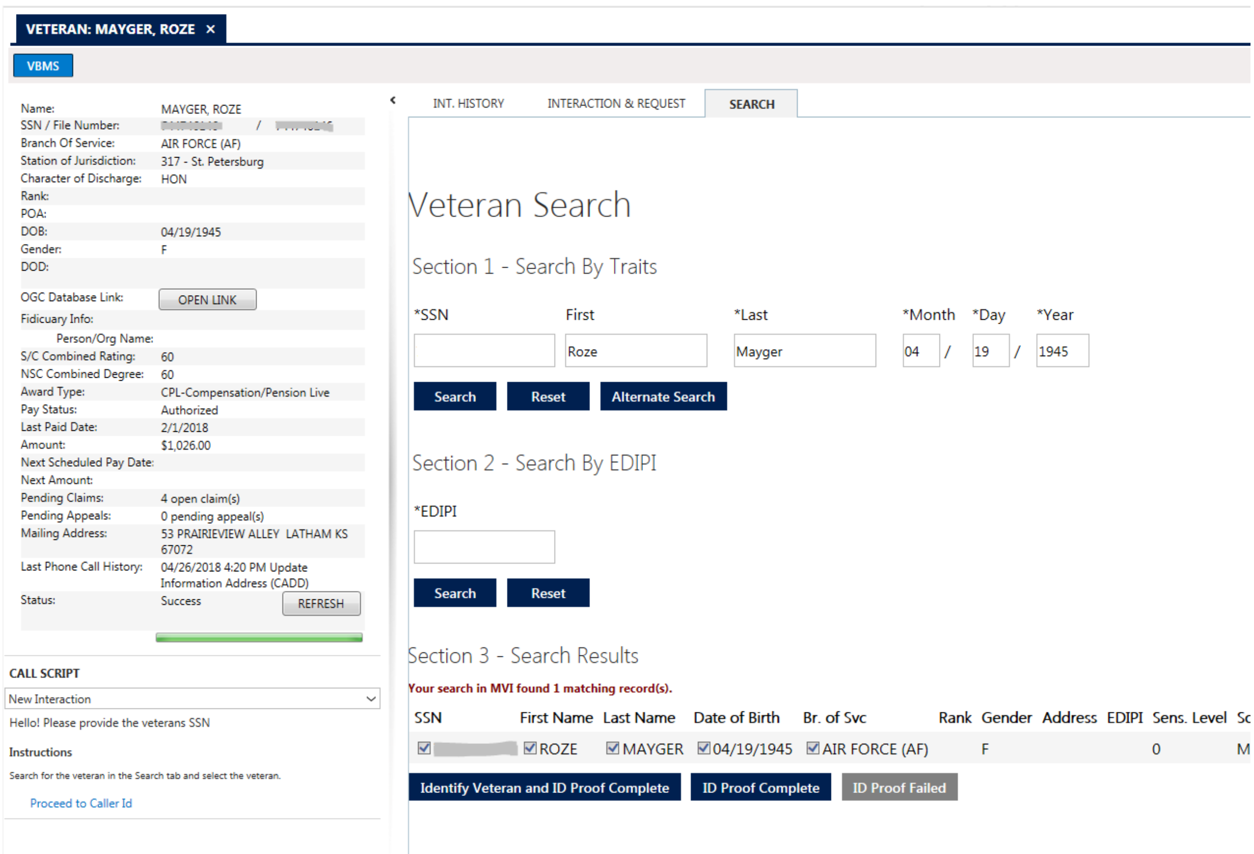


Non-Veteran Visitor

Non-Veteran visitors may include:

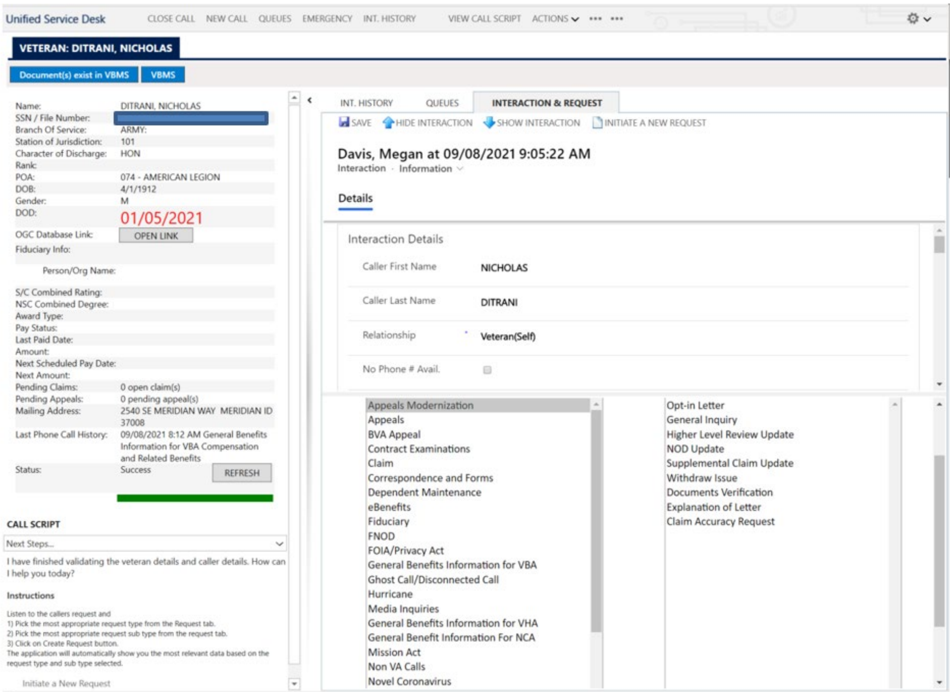
- Surviving Dependent
- Fiduciary
- Apportionee or Apportionee's parent/custodian/guardian etc.
- VSO
- Attorney
- Authorized Third Party (21-0845)

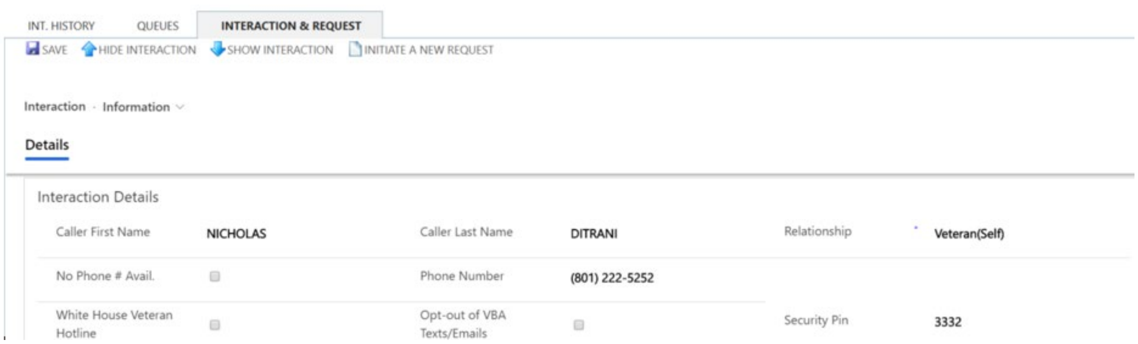
If you are speaking with a non-Veteran, verify if the individual is authorized to receive protected information, and verify ID Protocol. Then select "ID Proof Complete".



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**





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:

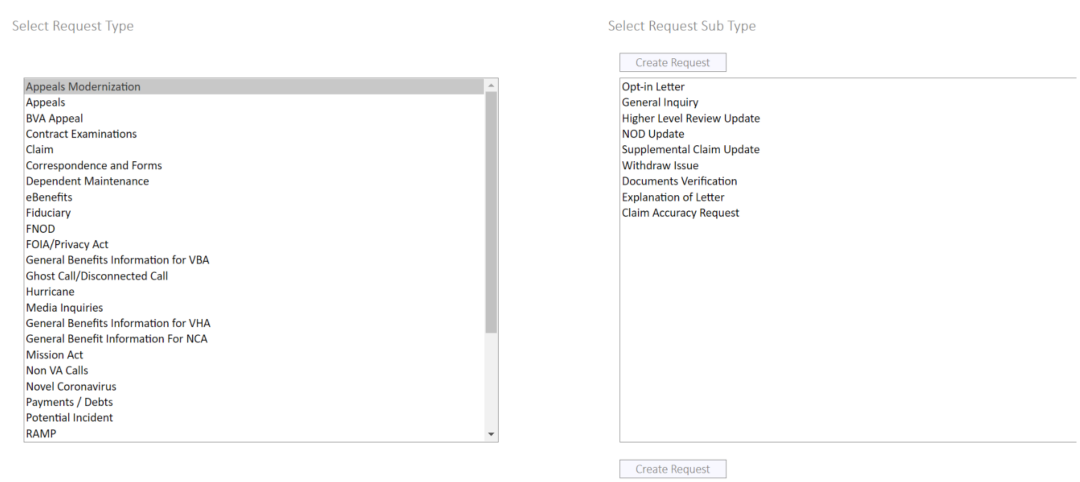
- Fiduciary Referral Procedures
- Processing Requests for Documents in the eFolder - General Information and FAQs
- Dependency Issues - Procedural Changes and FAQs
- Potential Incident/Privacy Violation Guidelines
- Agent Orange Exposure on C-123 Aircraft

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.*



Create Request

Now that we are familiar with the selections,

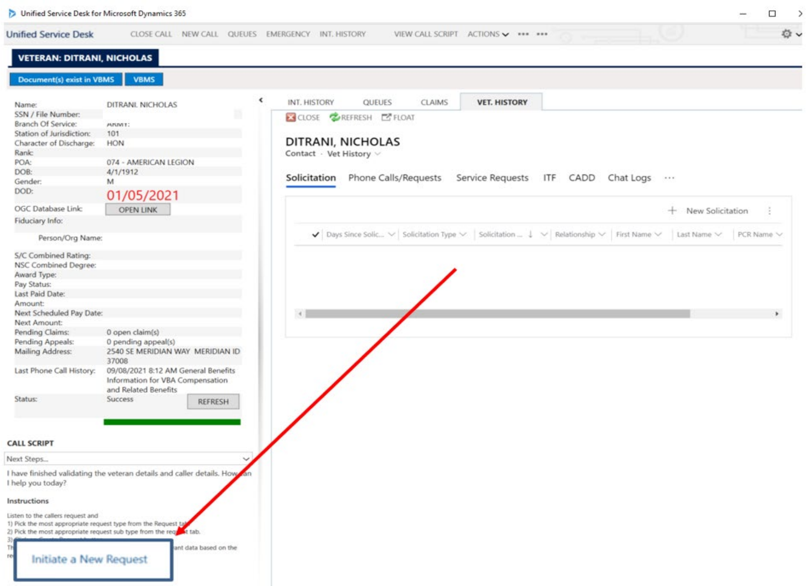
- select the *Request Type* Update Information and
- *Request Sub Type* Address (CADD).
- select Create Request

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.



Quick View and Flashes

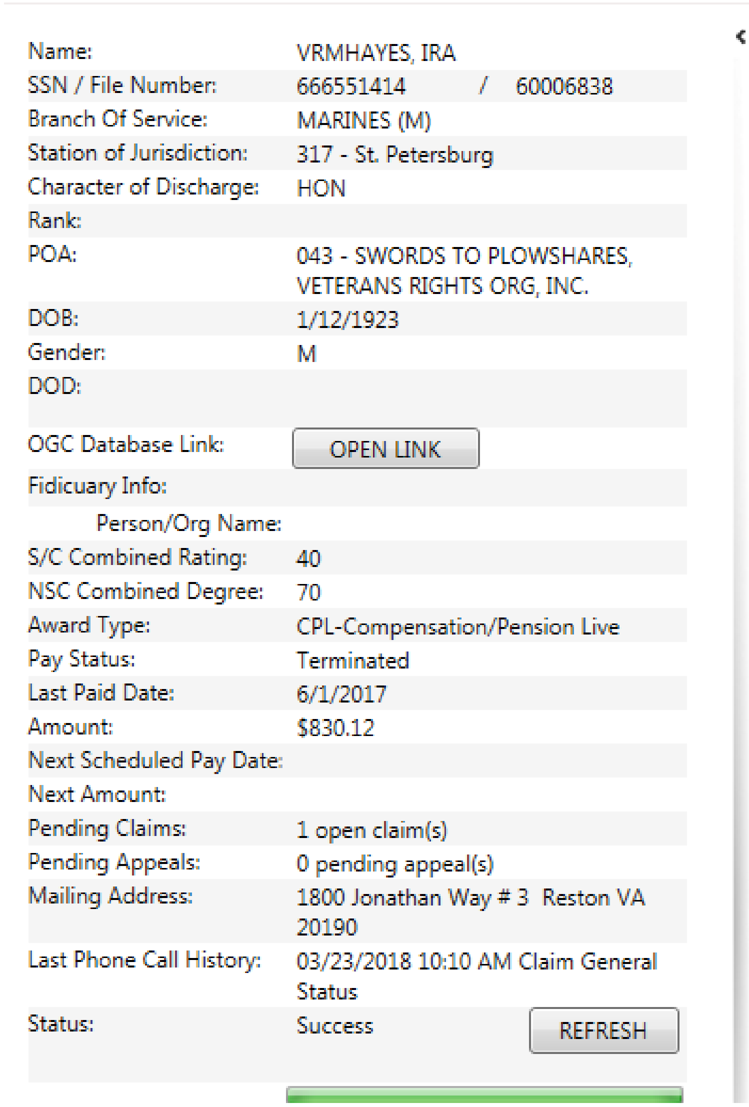
Now that we have accessed a record, let's begin our exploration of the layout of CRM/UD-O. This system makes information within a record readily available with little to no searching.

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.

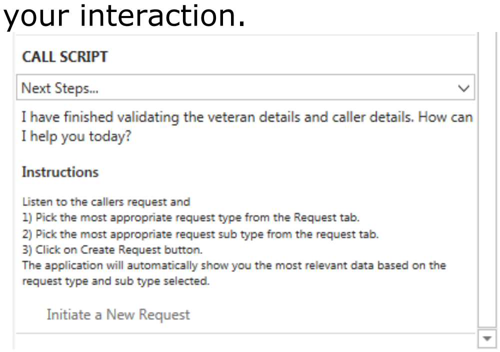


Name:	VRMHAYES, IRA
SSN / File Number:	666551414 / 60006838
Branch Of Service:	MARINES (M)
Station of Jurisdiction:	317 - St. Petersburg
Character of Discharge:	HON
Rank:	
POA:	043 - SWORDS TO PLOWSHARES, VETERANS RIGHTS ORG, INC.
DOB:	1/12/1923
Gender:	M
DOD:	
OGC Database Link:	OPEN LINK
Fiducuary 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?

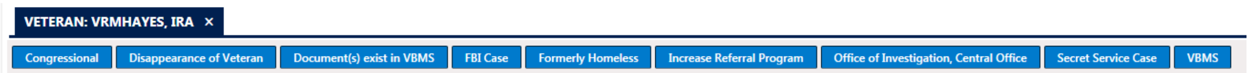
Instructions

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.



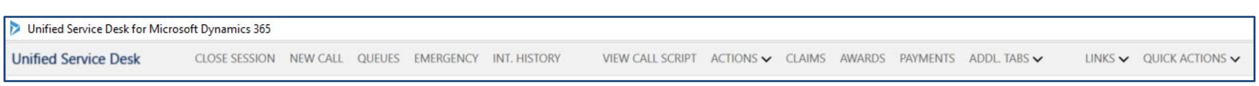
Information Within Tabs

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



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:

- 0820
- 0820a
- 0820d
- 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
- 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
- Pension
- Survivor's Pension and/or Dependency Indemnity Compensation (DIC)

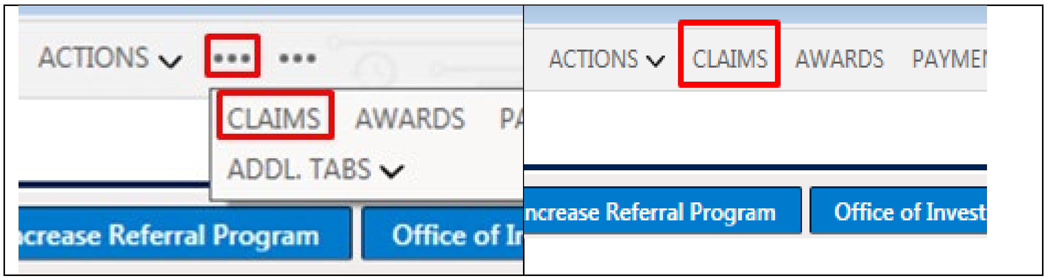
VBMS Upload
Covered in 0820 Routing procedures.

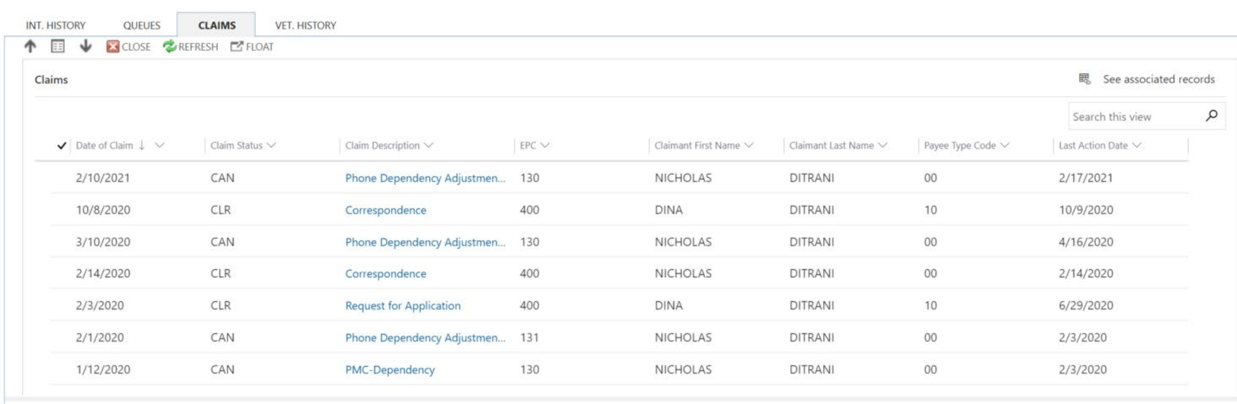
Dependency Maintenance
Dependency Maintenance action is only activated if the request is appropriately categorized.

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.




INT. HISTORY QUEUES CLAIMS VET. HISTORY

CLOSE REFRESH FLOAT

Claims

See associated records

Search this view

Date of Claim	Claim Status	Claim Description	EPC	Claimant First Name	Claimant Last Name	Payee Type Code	Last Action Date
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 single-click 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

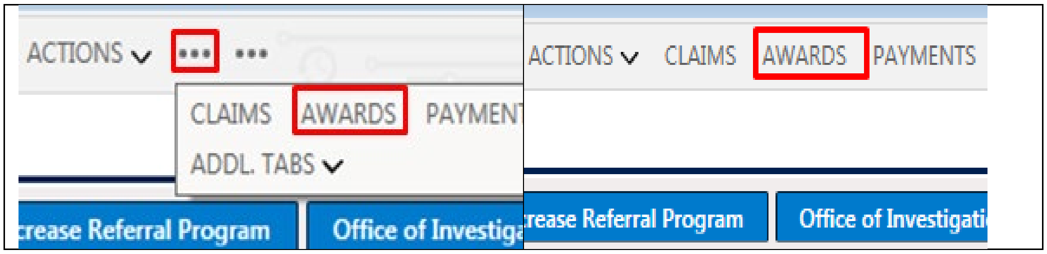
Development letters are letters that are sent to either claimants or third parties in attempt to obtain evidence to support a claim. Sometimes these letters can be accessed via this tab; however, PCRs should also utilize VBMS if tracked items suggest a pending development letter that cannot be accessed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



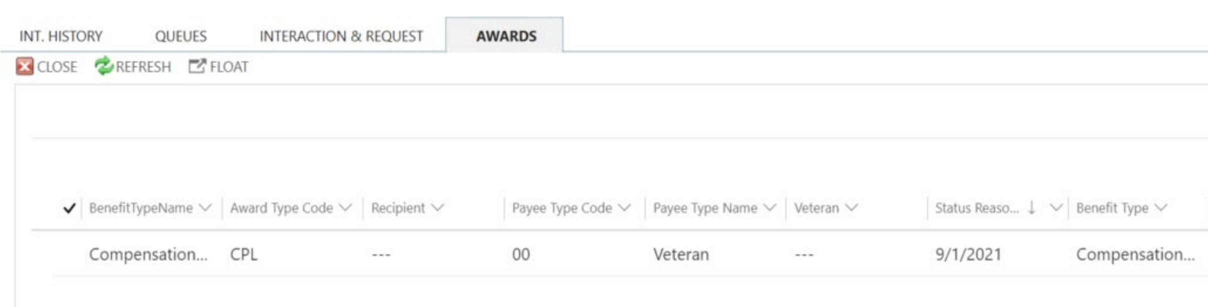
Within the Awards tab you will see a listing of beneficiaries on the award. Individuals who are in receipt or have received a recurring benefit from VBA may be seen on an awards tab.

This may include:

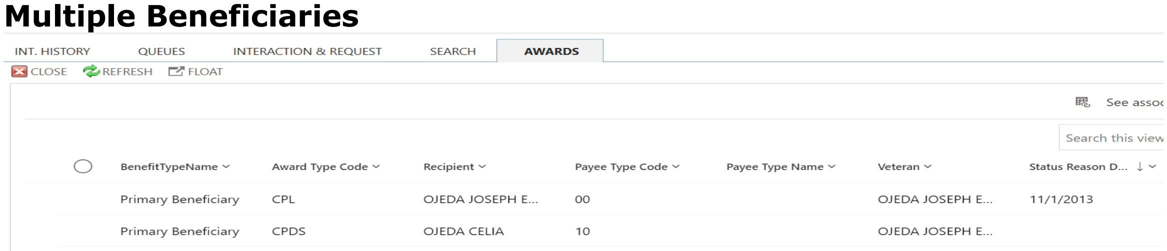
- Veteran
- Non-Veteran Beneficiary
    - Surviving Spouse
    - Surviving Child
    - Surviving Parent
- Apportionee

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

Only Veteran Beneficiary



Multiple Beneficiaries

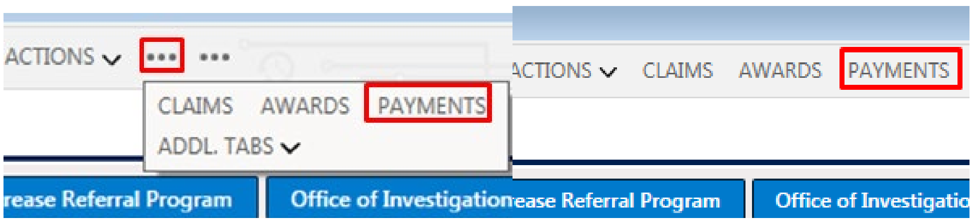


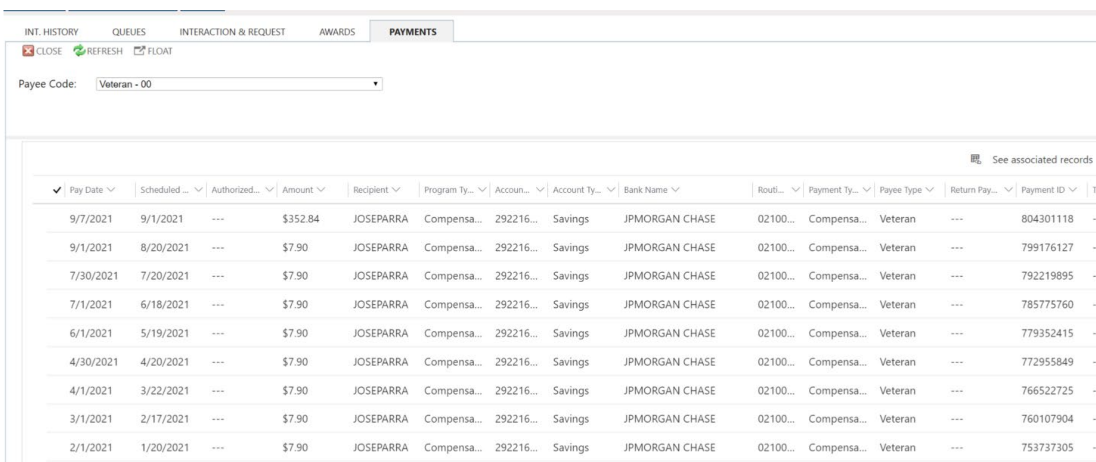
Double click on the beneficiary in review to access awards information. This activates access to the following sub tabs:

- Award Details
- Fiduciary
- Award/Payment Adjustment

- Award Lines
- Income Summary
- Diaries
- Clothing Allowance

Payments





Pay Date	Scheduled ...	Authorized...	Amount	Recipient	Program Ty...	Accoun...	Account Ty...	Bank Name	Routi...	Payment Ty...	Payee Type	Return Pay...	Payment ID	Tra
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	--
2/1/2021	1/20/2021	---	$7.90	JOSEPARRA	Compensa...	292216...	Savings	JPMORGAN CHASE	02100...	Compensa...	Veteran	---	753737305	--

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.

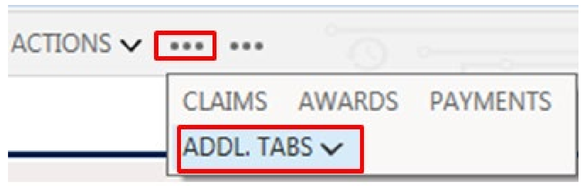
Practice
Review the information within the Payments Tab.
Select a payment and review the information within a payment's summary.
Note the information available in the following sub tabs:
- Payment Information
- Payment Details
- Payment Adjustments
- Award Adjustments

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

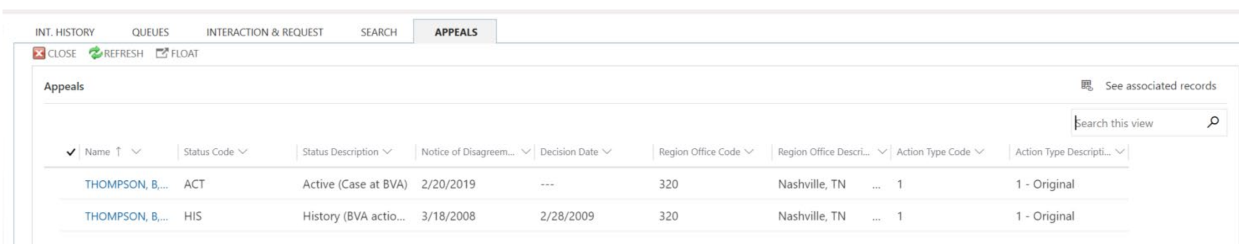
- Notes
- Military History
- Ratings
- Denials
- Exams & Appointments
- Legacy Payments
- BIRLS
- VBMS eFolder
- Interaction
- Veteran Profile
- Veteran History



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.



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 reverse-alphabetical 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)

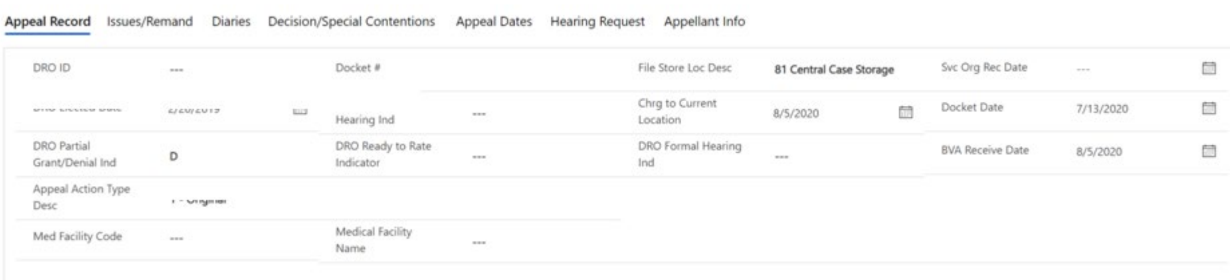
REM	Remand (case has been Remanded to VBA)

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



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.

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

Issues

Refresh | Run Report | Excel Templates

Sequence Number	Level 2	Issue Code Description	Issue Description	Program Description	Disposition Description	Disposition Date	Level 1 Description	Level 3 Description
7	Ankle, limite...	Increased rating	---	Compensation	---	---	Extraschedular	---
6	Ankle, limite...	Service connection	---	Compensation	---	---	All Others	---
5	---	Effective date	---	Compensation	---	---	Service connection ...	---
4	---	Effective date	---	Compensation	---	---	Service connection ...	---

1 - 4 of 7 Page 1

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.

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

Refresh | Run Report | Excel Templates

Req Activity Description	Response Notes Description	Diary Description	Assigned To	Assigned ...	Days to Complete	Due Date	Closed Date	Status	BVA/RO
cert	---	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	---	SENT TO AUTHORIZ...	SOC	5/28/2020	7	6/4/2020	5/28/2020	Closed	RO

1 - 4 of 12 Page 1

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.

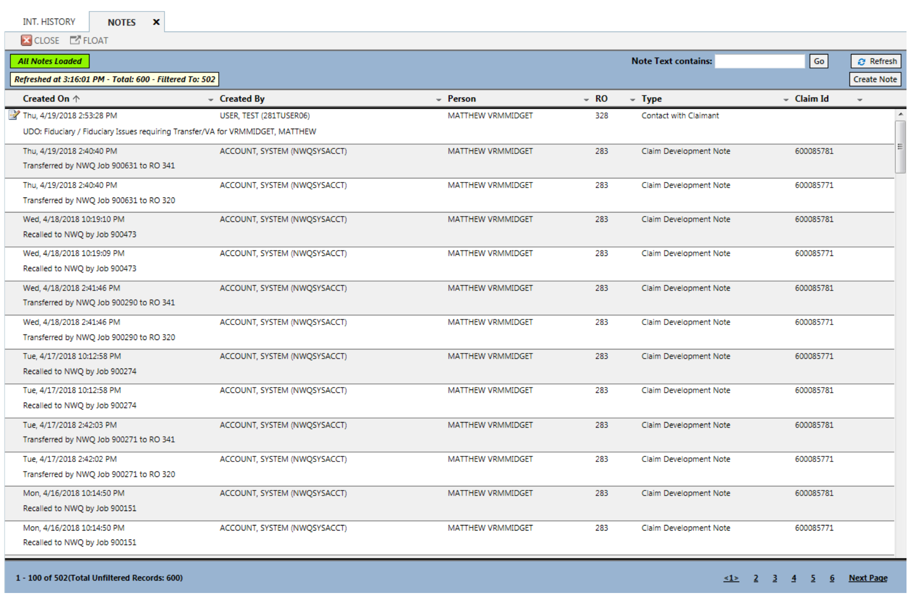
Hearing Request
Hearing request information, if available is located within this tab.

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.



Created On	Created By	Person	RO	Type	Claim Id
Thu, 4/19/2018 2:53:28 PM UDO: Fiduciary / Fiduciary Issues requiring Transfer/VA for VRMMIDGET, MATTHEW	USER, TEST (281TUSER06)	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.

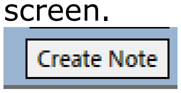
Searching Notes

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".

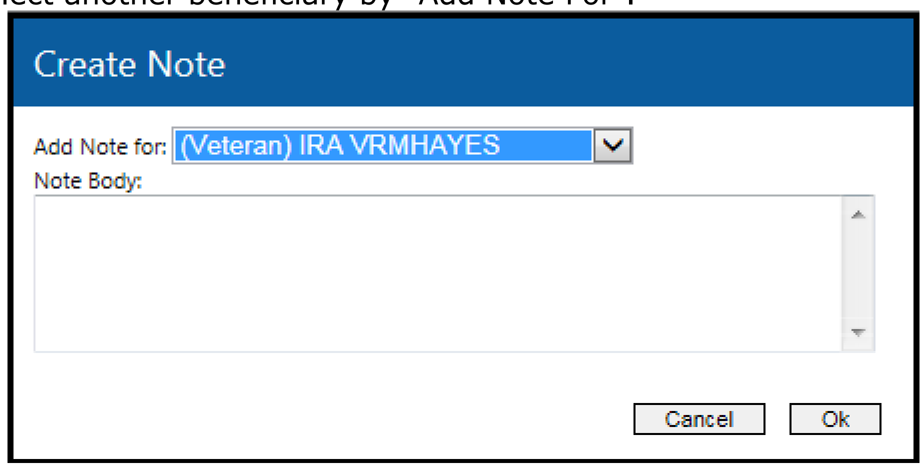
Example: A PCR checking notes to see if there are any notes pertaining to a VA Form 21-0845, can search "0845" and all notes with 0845 will display.

Create a Note

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

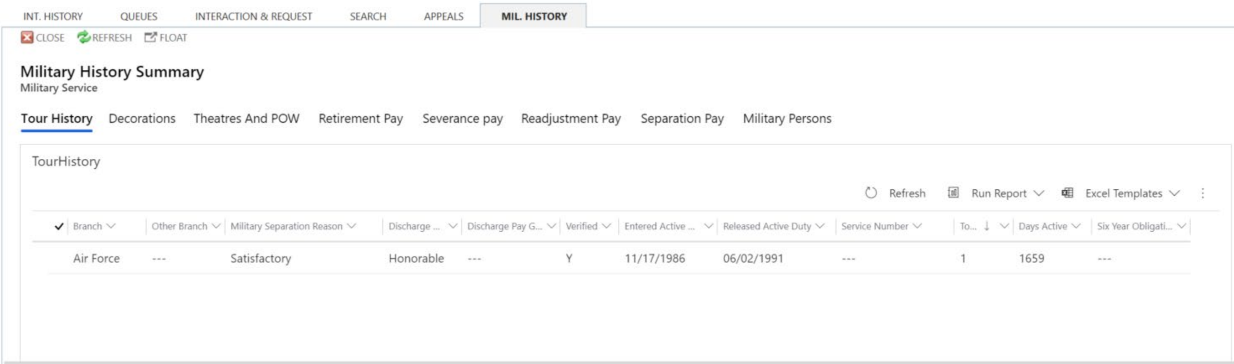


The "Create Note" box will pop up. The note will default to be for the Veteran; however, should the note be for another beneficiary, you may select the arrow down to select another beneficiary by "Add Note For".



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.



INT. HISTORY | QUEUES | INTERACTION & REQUEST | SEARCH | APPEALS | MIL. HISTORY

CLOSE | REFRESH | FLOAT

Military History Summary
Military Service

Tour History | Decorations | Theatres And POW | Retirement Pay | Severance pay | Readjustment Pay | Separation Pay | Military Persons

TourHistory

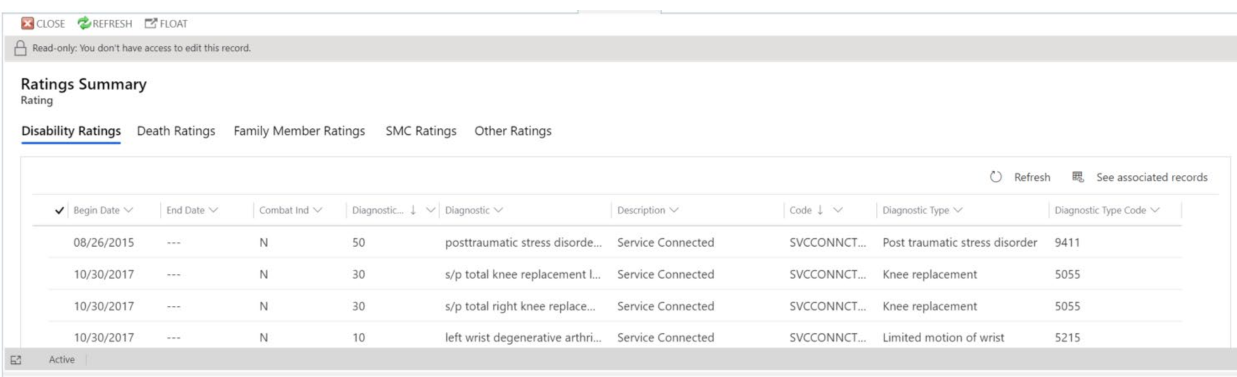
Refresh | Run Report | Excel Templates

Branch	Other Branch	Military Separation Reason	Discharge ...	Discharge Pay G...	Verified	Entered Active ...	Released Active Duty	Service Number	To...	Days Active	Six Year Obligati...
Air Force	---	Satisfactory	Honorable	---	Y	11/17/1986	06/02/1991	---	1	1659	---

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



CLOSE | REFRESH | FLOAT

Read-only: You don't have access to edit this record.

Ratings Summary
Rating

Disability Ratings | Death Ratings | Family Member Ratings | SMC Ratings | Other Ratings

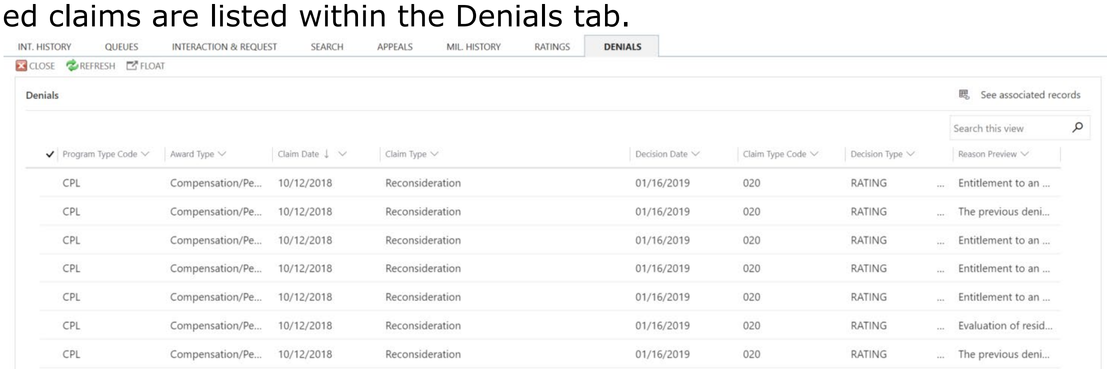
Refresh | See associated records

Begin Date	End Date	Combat Ind	Diagnostic...	Diagnostic	Description	Code	Diagnostic Type	Diagnostic Type Code
08/26/2015	---	N	50	posttraumatic stress disorde...	Service Connected	SVCCONNCT...	Post traumatic stress disorder	9411
10/30/2017	---	N	30	s/p total knee replacement l...	Service Connected	SVCCONNCT...	Knee replacement	5055
10/30/2017	---	N	30	s/p total right knee replace...	Service Connected	SVCCONNCT...	Knee replacement	5055
10/30/2017	---	N	10	left wrist degenerative arthri...	Service Connected	SVCCONNCT...	Limited motion of wrist	5215

Active

Denials

Denied claims are listed within the Denials tab.



INT. HISTORY | QUEUES | INTERACTION & REQUEST | SEARCH | APPEALS | MIL. HISTORY | RATINGS | DENIALS

CLOSE | REFRESH | FLOAT

Denials

See associated records

Search this view

Program Type Code	Award Type	Claim Date	Claim Type	Decision Date	Claim Type Code	Decision Type	Reason Preview
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	Entitlement to an ...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	The previous deni...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	Entitlement to an ...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	Entitlement to an ...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	Entitlement to an ...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	01/16/2019	020	RATING ...	Evaluation of resid...
CPL	Compensation/Pe...	10/12/2018	Reconsideration	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

Exams Appointments

Exams

Ref #	Exam	Exam Description	Date of...	Exam Place	Status	Patient	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...	---	598
410908	---	DBQ REVIEW ...	11/12/2015	CLINIC	COMPLET...	---	598
410907	---	DBQ WRIST C...	11/12/2015	CLINIC	COMPLET...	---	598

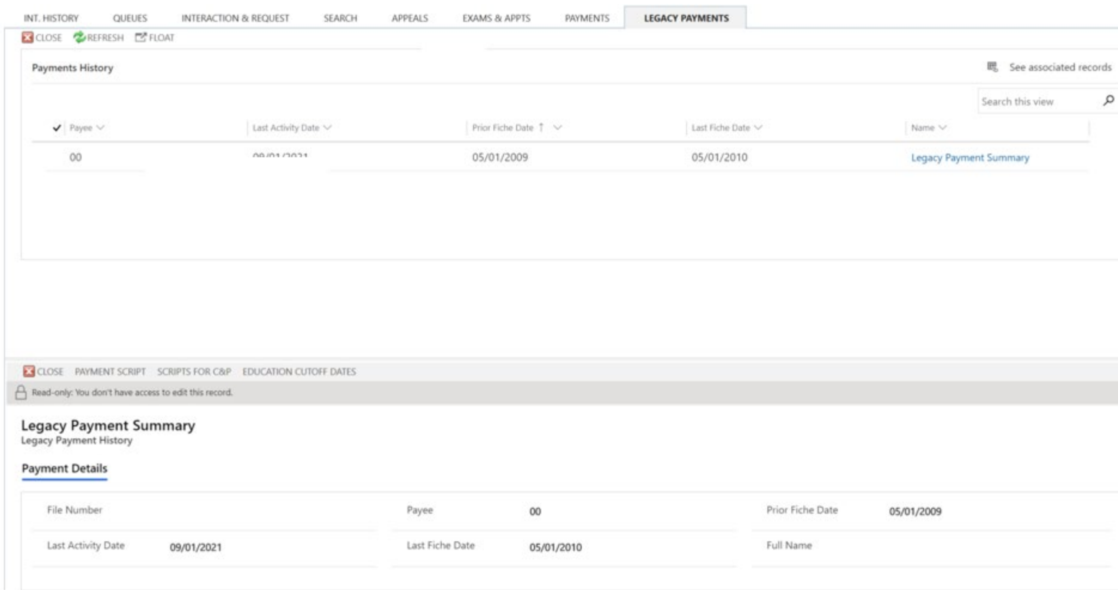
Legacy Payments

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
    - Payee
    - Last Activity Date
    - File Number
- Payment Data
    - Type of Payment
    - 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



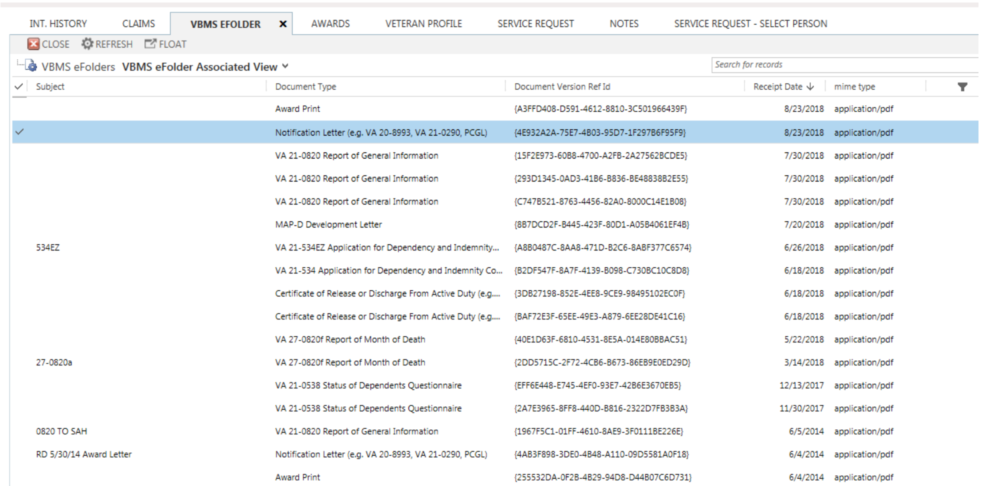
BIRLS

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

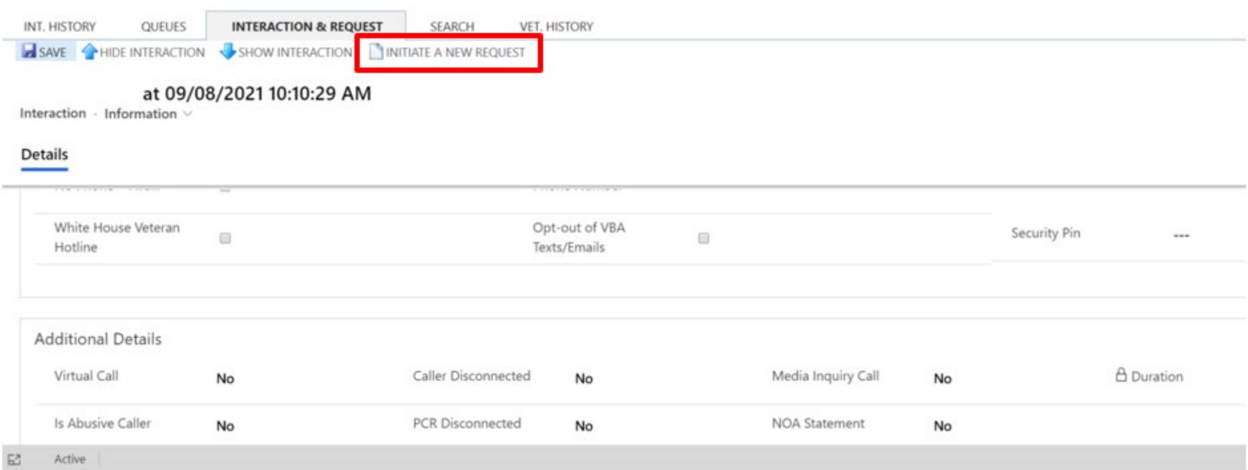
VBMS eFolder

Access documents within the VBMS eFolder.

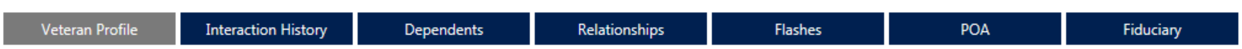


Interaction

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



Veteran Profile

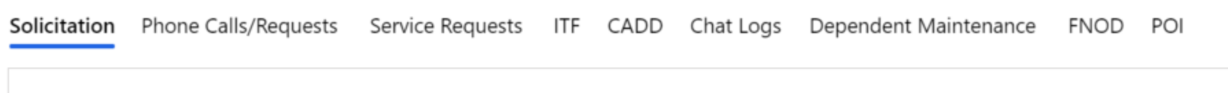


The Veteran Profile subtabs include:

- Veteran Profile
- Interaction History
- Dependents
- Relationships
- Flashes
- 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



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	Hayes	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 **NOT** 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.