

Service Requests



Public Contact Team CRM/UD-O Training

OFO-NCC

February 2022

References: KM Articles

- [0820 Routing Procedures](#)
- [What Can Be Accepted by Phone / What Must Be Submitted in Writing](#)
- [Standard Claims and Appeals Forms - Background Information, Procedural Guidance, Script and FAQs](#)
- [Standard Claims and Appeals Forms - Benefits Types Not Encompassed By ITF - Procedural Guidance.](#)
- [Dependency Issues - Procedural Changes and FAQs](#)
- [Potential Incident/Privacy Violation Guidelines](#)

Introduction

The Department of Veterans Affairs (VA) refers to development as the process of obtaining and documenting evidence to support a claim for benefits. Public Contact Representatives (PCRs) play a vital role in the development process, as claimants routinely contact VA to provide information necessary to support their pending claims and/or appeals. The information gathered from these interactions is critical to the claims process and may affect the administration of benefits.

PCRs Role in Development

As a Public Contact Representative (PCR), you are an active participant in the claims process. You are the first step in ensuring that a claim for benefits is complete and that all required documentation is submitted with each application.

Advocate

Your main role is that of an advocate for the claimant, especially in situations where the claimant may not have the necessary knowledge or information required to complete the process on their own. In this capacity, you act as an advocate for Veterans and other claimants by officially documenting necessary evidence or information received on VA Form 27-0820, *Report of General Information*.

Advise

The client relies on your knowledge of the claims process to submit a complete package that is ready for review. Those working claims within VA rely on information obtained from your conversations to process claims as quickly as possible. The advice you provide to our Veteran community can accelerate or adversely affect the outcome of the application for benefits.

Depending on the specific situation, you may need to advise the claimant to submit information in writing, submit information electronically, submit an additional form, or you may be able to document the information for them. There may be conversations where multiple actions are necessary.

Types of Development

Laws, regulations, and procedures impact what types of claim or benefits development must be submitted in writing or must be documented when provided via communication with the client (often on a VA Form 27-0820 (series)). During client conversations, a claimant may contact VA to specifically provide you with

information, you may inadvertently hear some information that you recognize should be documented, or you may see notes in the system indicating that a processor is waiting on a critical piece of information to complete the claim.

VA Form 27-0820, Report of General Information

Generally, PCRs should complete VA form 27-0820 (series) when an inquirer provides information that requires:

- An action by the VSC regarding a claim or an award or, OR
- Documentation of the information for VA official records, such as evidence.

Types of VA Form 27-0820s

Typically, PCRs utilize one of the following four forms in the VA Form 27-0820 series to document evidence or information for an inquirer:

- VA Form 27-0820, *Report of General Information*
- VA Form 27-0820a, *Report of Death*
- VA Form 27-0820d, *Report of Non-Receipt of Payment*
- VA Form 27-0820f, *Report of Month of Death*

A majority of VA Form 27-0820s you will send will be on VA Form 27-0820, *Report of General Information*. All other forms in the VA Form 27-0820 series are designated for a specific function.

Common 27-0820s

The below table provides common 27-0820s, associated guidance, and when applicable the corresponding quick write available in CRM/UD-O.

Intent to File for Benefits (ITF)

Review KM article, [Standard Claims and Appeals Forms - Background Information, Procedural Guidance, Script and FAQs](#)

ITF is an action within CRM/UD-O or on VA Form 21-0966 and **must not be reported on VA Form 27-0820**.

Not all VA benefits are encompassed by ITF. In these circumstances comply with the guidance within KM article, [Standard Claims and Appeals Forms - Benefits Types Not Encompassed By ITF - Procedural Guidance](#).

Standardized Work

The quick write tool in CRM/UD-O provides standardized language for common service requests. PCRs are encouraged to use this resource, as standardized language reduces spelling and grammatical errors, and provides clear and consistent information to the VSC.

Quick writes are editable, and provide space for PCRs to include information such as EPs, DOCs, etc. A list of Quick writes is provided with this lesson.

Example:

Quick Write:

The Veteran called to reschedule the ___ C&P appointment at _____ for the _____ claim cest'd _____. The Veteran missed the exam because _____. The Veteran will make the rescheduled exam.

Would be edited to read:

The Veteran called to reschedule the PTSD C&P appointment at the St. Louis VAMC for the EP 020 claim cest'd 8/9/2017. The Veteran missed the exam because of inclement weather. The Veteran will make the rescheduled exam.

VA Form 27-0820s with Specific Requirements

Specific information within a VA Form 27-0820 may be required in certain scenarios. Utilize KM, and review the most recent guidance on the topic. Specific information may be obtained from a quick search of the subject matter within KM.

For example:

1. Access article, [Dependency Issues - Procedural Changes and FAQs](#)
2. Click segment, *Verification of Dependents on Award (21-0538/21-0537 VERIFICATION)*
3. Observe 27-0820 guidance specific to each scenario

Additional guidance articles with specific 27-0820 instructions include:

- [Potential Incident/Privacy Violation Guidelines](#)
- [Review of Traumatic Brain Injury \(TBI\) Claims](#)
- [Mustard Gas / Lewisite Readjudication](#)

Proper Documentation of VA Form 27-0820

Quality

PCRs provide a critical contribution to the claims process by documenting evidence and information provided by claimants.

VA Form 27-0820 is an official document, and when submitted to the SOJ, becomes a part of the Veteran's official record, so it is important that the message included on the form is professional and clearly communicated. Ensuring the quality of this correspondence item will help to protect the integrity of the VA and enable PCRs to act as advocates for the Veteran community.

Specify the Claim/Appeal

When supplying claims specific information, it is imperative information is provided with clear communication. This information helps the VSC clearly determine the claim or appeal referenced.

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VA Form 27-0820s specific to a **claim** must include:

- End Product Code (EP, EPC, or EP Code)
- Date of Claim (DOC or cest date)
- Specific contentions (if applicable)

VA Form 27-0820s specific to an **appeal** must include:

- Notice of Disagreement (NOD) Date
- Specific contentions (if applicable)

27-0820 Workshop

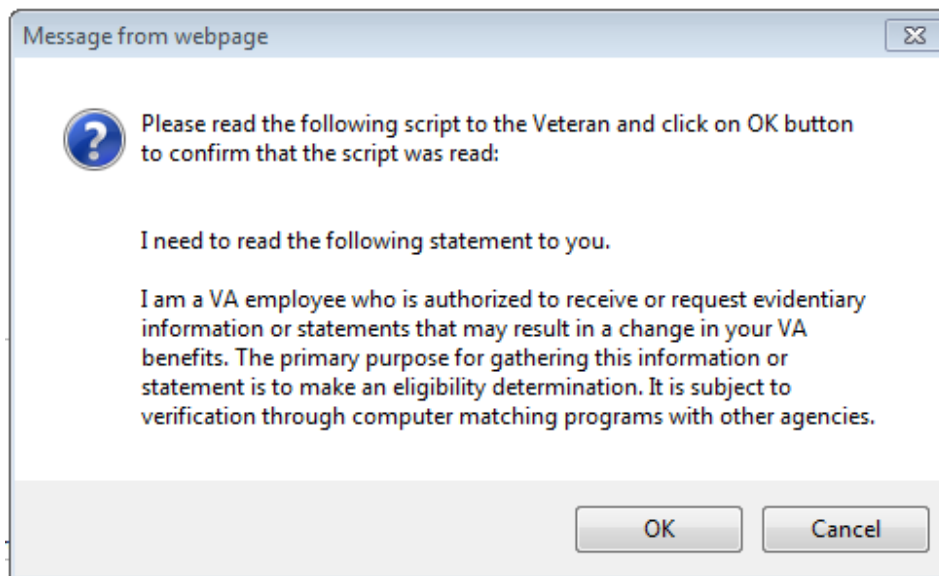
Materials:

- *Service Requests Job Aid*
- *Quick Writes Handout*
-

Practice creating 27-0820 forms with quick writes in the test environment of CRM/UD-O.

Notice of Action (NOA) Statement

The Notice of Action (NOA) statement is required when completing most VA Form 27-0820 series, with the exclusion of VA Form 27-0820a and VA Form 27-0820s that are created to refer a Potential Incident for review.



Reading the NOA statement in its entirety to an individual, allows the Veteran Service Center (VSC) to take immediate adverse action, when necessary, on an award without the requirement of due process. This helps to reduce or eliminate any potential overpayment that could be the result of the requested change.

Example:

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A pension recipient may report income adjustments, which in turn could reduce VA benefits. With the NOA statement, the pension recipient is aware the information provided and documented by the PCR has the potential to result in a reduction of benefits, and allows the VSC to take immediate action.

The statement pops up in CRM/UD-O when submitting a VA Form 27-0820 series. For VA Form 27-0820ds, this statement is extended to include additional language specific to reporting non-receipt of payment.

27-0820 Routing Procedures

Guidance outlined in KM article, [0820 Routing Procedures](#) directs where completed 27-0820 (series) are routed.

The varying types of development documented on 27-0820 (series) have a variety of routing options. [0820 Routing Procedures](#) provides PCRs with the routing method that delivers the most efficient processing for the various types of claims or benefit development gathered.

All emails containing Personally Identifiable Information (PII) must be encrypted.

[0820 Routing Procedures](#). Review the attachments at the bottom of the article.

Attachments:

- [VBMS Upload Instructions.docx](#)
- [CM_Upload_Tool.docx](#)

Please note specific guidance may impact routing such as:

- [Potential Incident/Privacy Violation Guidelines](#)
- [Review of Traumatic Brain Injury \(TBI\) Claims](#)

Non-Emergency Email

Non-Emergency Emails are much less common, especially in PCT; however, should a coordinator be required that is not available, this may be the best course of action to formally communicate with this individual.

Emailing Forms

Sending blank forms to clients via email can be done easily in UDO. PCR should ensure return information is provided to the claimant.

- Navigate to **Service Request** tab
- Change Actions to **Email Forms**