



VBA VSignals Service Recovery Program: Documenting and Storing Service Recovery Call Information



Duration: 30 minutes

Audience:

This lesson is intended for Service Recovery Practitioners (SRPs)

Purpose

The purpose of the training is to equip SRPs with the essential skills and knowledge for documenting key concepts during service recovery interactions.

Objective

Upon completing, participants will be able to:

- Document feedback from SR interactions in a Call List and the VSignals platform

Documenting the Call

During the SR call, all information will be captured and maintained on the call list or in the VSignals platform. If you choose to handwrite information received during the call, the information should be reviewed and placed in the call list or VSignals immediately following the conclusion of the call.

- **What should I capture?**
Capture key quotes when possible. When capturing long responses, summarize what was said to ensure notes are correct.
- **After the call, I noticed key themes or threads throughout the discussion that may be important to capture. What should I Do?**
Use the Note section to capture these observations. A notes section is located at the end of each row on the call list. In the VSignals, you can add a note by selecting the “Add Note” button at the top of the survey respondent’s profile.
- **What if I did not understand what was said?**
For clarification, such as acronyms and spelling, it is okay to ask a clarifying question. However, be mindful of not interrupting the flow of the conversation.
- **What if something is said that is not correct?**
Even if you think the survey respondent is ‘wrong,’ this is their perception of their experience and should be captured as it is described.

As illustrated below, the call list is designed to include the survey question at the top and the follow-up questions below. The low Likert response will be on the left and the high Likert response will be on the right.

1. When VA called me or met with me for an informal conference to discuss my claim, the VA decision maker that conducted my informal conference was helpful.	
Score 1a. Likerts 1,2,3: Please tell us why the decision-maker was not helpful.	1b. Likerts 4,5: Please tell us why the decision-maker was helpful.
2. VA's notification letter clearly explained the reasons and bases for my Higher-Level Review decision.	
Score 2a. Likerts 1,2,3: What can VA do to make our notification letters on Higher-Level Review decisions better or easier to read?	2b. Likerts 4,5: What, if any, improvements would you make to the VA notification letter?
3. I trust VA to fulfill our country's commitment to Veterans.	
Score 3a. Likerts 1,2,3: How can VA better demonstrate its promise to care for Veterans?	3b. Likerts 4,5: How did VA demonstrate its promise to care for Veterans?

Documenting the Call in the VSignals Platform

When documenting follow-up information from the survey respondents who provide a low Likert score in VSignals, only the low Likert follow-up questions will be provided. When documenting calls to survey respondents who provide a high Likert score, only the high Likert follow-up questions will be provided.

Please complete additional follow-up Service Recovery Questions.

What made the medical exam process difficult for you?

In-Survey Question: I believe the compensation medical exam process (e.g., scheduling, notice, travel) was easy.

How can VA improve the online platform and/or letters to provide more useful updates?

In-Survey Question: The online platform and/or letters gave me useful status updates throughout the disability compensation claims process.

Optional Question: Have the status updates been consistent from various sources (i.e. online, letters, VA reps)?

In-Survey Question: The online platform and/or letters gave me useful status updates throughout the disability compensation claims process.

What would be a reasonable amount of time to decide a claim? What is your understanding of VA's timeliness goal to complete disability claims?

Documenting the Call in the Call List

For BLs/POs using a call list, a basic knowledge of Excel is noted to be helpful. The electronic spreadsheet program known for storing, organizing, and manipulating data is used in the service recovery program for the creation or management of call lists and documenting caller feedback. Having a basic knowledge of Excel will increase the ease of navigating the Excel template when completing service recovery activities. SPMO will let you know if your BL/PO is using the Excel call lists or if it has transitioned to the VSignals platform.

Shown below is a sample illustration of the call list and a description of each column:

1	2	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
1	Survey Export							7. I trust VA to fulfill out country's commitment to Veterans			
2		1	2	3					7a. Likerts 1,2,3 What would increase your trust in our ability to fulfill our commitment to veterans?	7b. Likerts 4,5 is there anything in particular that leads you to trust in our ability to fulfill our commitment to veterans?	
	Survey Type	Team Member	Date of Last Contact	Contact Status	Call Attempt	Call Duration (minutes)	Call Prep. Time (minutes)	Applying Overall Score	Score		Notes
3	APPLYING FOR BENEFITS			Answered, participated attempt				1	1		
4	APPLYING FOR BENEFITS			Answered, declined attempt 1				1	2		
5	APPLYING FOR BENEFITS			No Answer - Attempt 1				2	2		
6	APPLYING FOR BENEFITS			Answered on attempt 2, particip				2	1		
7	APPLYING FOR BENEFITS			Answered on attempt 2, declin				2	3		
8	APPLYING FOR BENEFITS			No Answer - Attempt 2				3	4		
9	APPLYING FOR BENEFITS			Email Sent				3	1		
10	APPLYING FOR BENEFITS			Requested Call Back from Email				3	3		
11	APPLYING FOR BENEFITS							3	4		
12	APPLYING FOR BENEFITS							4	4		
13	APPLYING FOR BENEFITS							4	2		
14	APPLYING FOR BENEFITS							4	4		
15	APPLYING FOR BENEFITS							4	4		
16	APPLYING FOR BENEFITS							4	3		
17	APPLYING FOR BENEFITS							4	4		
18	APPLYING FOR BENEFITS							4	4		
19	APPLYING FOR BENEFITS							4	4		
20	APPLYING FOR BENEFITS							4	5		
21	APPLYING FOR BENEFITS							4	5		
22	APPLYING FOR BENEFITS							4	4		
23	APPLYING FOR BENEFITS							4	4		
24	APPLYING FOR BENEFITS							4	4		
25	APPLYING FOR BENEFITS							4	4		
26	APPLYING FOR BENEFITS							4	4		
27	APPLYING FOR BENEFITS							4	5		
28	APPLYING FOR BENEFITS							4	4		
29	APPLYING FOR BENEFITS							4	4		
30	APPLYING FOR BENEFITS							4	4		

1- Team Member: Enter the name of the SRP conducting the call. Type in your name or select it from the drop-down menu.

2- Date of Last Contact: Enter the date of last contact with the survey respondent.

3- Call Status: Select the appropriate response from the drop-down menu to indicate the contact status. This will let other SRPs working in the call list know whether the call was denied, if an additional call attempt is required, or if the call is complete.

1	2	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
1	Survey Export							7. I trust VA to fulfill out country's commitment to Veterans			9
2				4	5	6	7	8	7a. Likerts 1,2,3 What would increase your trust in our ability to fulfill our commitment to veterans?	7b. Likerts 4,5 is there anything in particular that leads you to trust in our ability to fulfill our commitment to veterans?	
	Survey Type	Team Member	Date of Last Contact	Contact Status	Call Attempt	Call Duration (minutes)	Call Prep. Time (minutes)	Applying Overall Score	Score		Notes
3	APPLYING FOR BENEFITS			1st Attempt				1	1		
4	APPLYING FOR BENEFITS			2nd Attempt				1	2		
5	APPLYING FOR BENEFITS							2	2	9a	
6	APPLYING FOR BENEFITS							2	1		
7	APPLYING FOR BENEFITS							2	3		
8	APPLYING FOR BENEFITS							3	4		
9	APPLYING FOR BENEFITS							3	1		
10	APPLYING FOR BENEFITS							3	3		
11	APPLYING FOR BENEFITS							3	4		
12	APPLYING FOR BENEFITS							4	4		
13	APPLYING FOR BENEFITS							4	2		
14	APPLYING FOR BENEFITS							4	4		
15	APPLYING FOR BENEFITS							4	4		
16	APPLYING FOR BENEFITS							4	3		
17	APPLYING FOR BENEFITS							4	4		
18	APPLYING FOR BENEFITS							4	4		
19	APPLYING FOR BENEFITS							4	3		
20	APPLYING FOR BENEFITS							4	5		
21	APPLYING FOR BENEFITS							4	5		
22	APPLYING FOR BENEFITS							4	4		
23	APPLYING FOR BENEFITS							4	4		
24	APPLYING FOR BENEFITS							4	4		
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26	APPLYING FOR BENEFITS							4	4		
27	APPLYING FOR BENEFITS							4	5		
28	APPLYING FOR BENEFITS							4	4		
29	APPLYING FOR BENEFITS							4	4		
30	APPLYING FOR BENEFITS							4	4		

4- Call Attempt: Select the appropriate response from the drop-down menu to indicate if the call status is related to the first or second attempt. If the call is successful on the second attempt, remember to go back to the “contact status” column and update the information to show complete.

5- Call Duration: Enter information regarding the call duration.

6- Call Preparation Time: Enter the amount of time for call preparation.

7- Applying Overall Score: Pre-populated column that provides information regarding the overall rating provided by the survey respondent; no actions are required by the SRP.

8- Score: Pre-populated column that indicates the rating the survey respondent assigned to the survey question (Box 9). A Likert score of one through five is provided; with a one being low and a five being high.

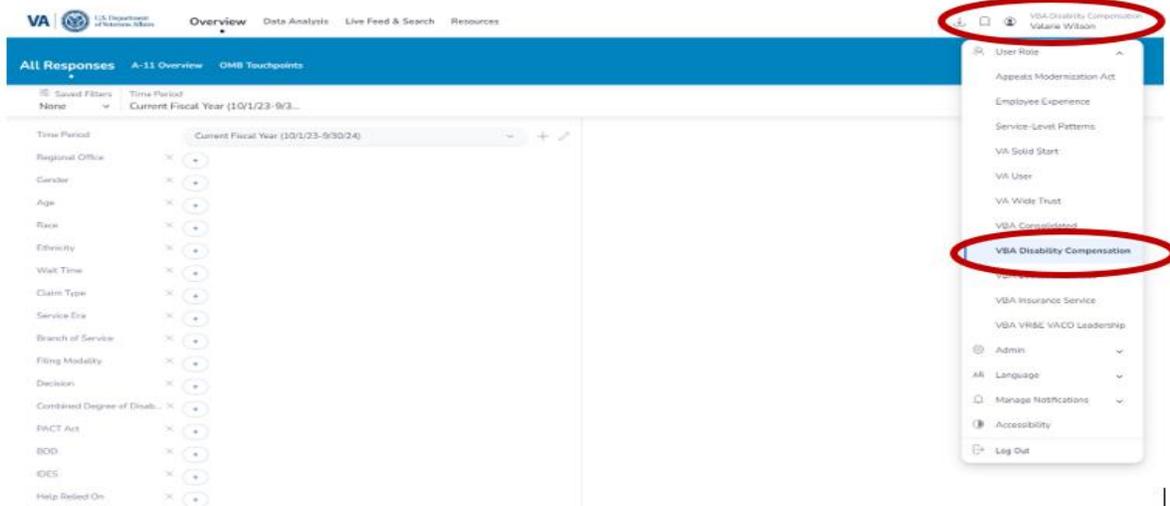
9- Survey question: The survey question provided to the survey respondent. When a low Likert score is provided in score column (8) the survey respondent would get the follow-up question in box 9a, and a high Likert score would get the follow-up question in box 9b. The response provided by the survey respondent is entered in the appropriate column below the question.

1	Survey Export							7. I trust VA to fulfill out country's commitment to Veterans			
2	Team Member	Date of Last Contact	Contact Status	Call Attempt	Call Duration (minutes)	Call Prep. Time (minutes)	Applying Overall Score	Score	7a. Likerts 1,2,3 What would increase your trust in our ability to fulfill our commitment to veterans?	7b. Likerts 4,5 Is there anything in particular that leads you to trust in our ability to fulfill our commitment to veterans?	Notes
3	APPLYING FOR BENEFITS			1st Attempt			1	1			
4	APPLYING FOR BENEFITS			2nd Attempt			1	2			
5	APPLYING FOR BENEFITS						2	2			
6	APPLYING FOR BENEFITS						2	1			
7	APPLYING FOR BENEFITS						2	3			
8	APPLYING FOR BENEFITS						3	4			
9	APPLYING FOR BENEFITS						3	1			
10	APPLYING FOR BENEFITS						3	3			
11	APPLYING FOR BENEFITS						3	4			
12	APPLYING FOR BENEFITS						4	4			
13	APPLYING FOR BENEFITS						4	2			
14	APPLYING FOR BENEFITS						4	4			
15	APPLYING FOR BENEFITS						4	4			
16	APPLYING FOR BENEFITS						4	3			
17	APPLYING FOR BENEFITS						4	4			
18	APPLYING FOR BENEFITS						4	4			
19	APPLYING FOR BENEFITS						4	3			
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24	APPLYING FOR BENEFITS						4	4			
25	APPLYING FOR BENEFITS						4	4			
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28	APPLYING FOR BENEFITS						4	4			
29	APPLYING FOR BENEFITS						4	4			
30	APPLYING FOR BENEFITS						4	4			

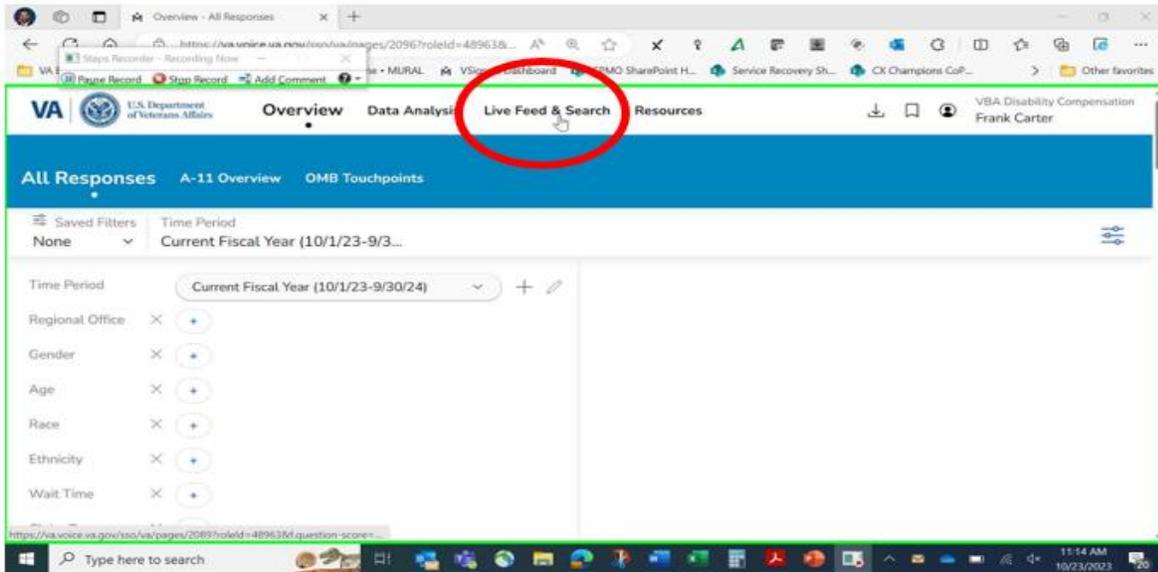
10-Notes: A notes section is located at the end of each row of the call list. Place additional information regarding the call in this section. Information placed here is not only helpful to you but also to other SRPs and SRAs who may also be reviewing the call list or working behind you.

Documenting Calls in VSignals

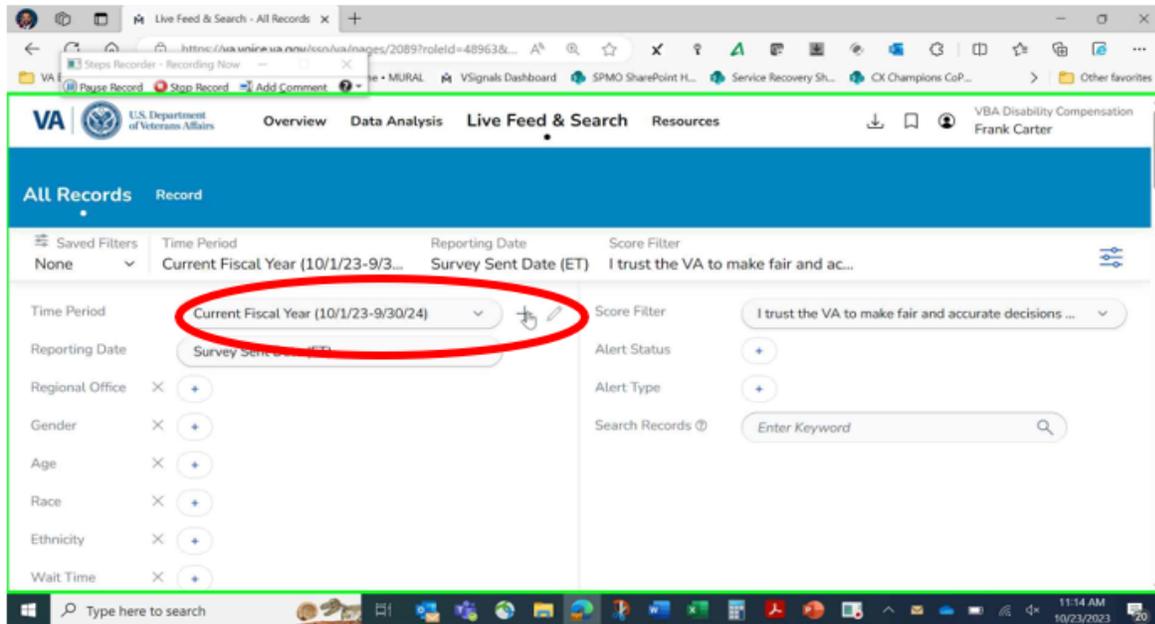
Step 1: After logging into the VSignals platform, select your dashboard from the dropdown menu under your name.



Step 2: Select the “Live Feed & Search” page at the top of the screen.

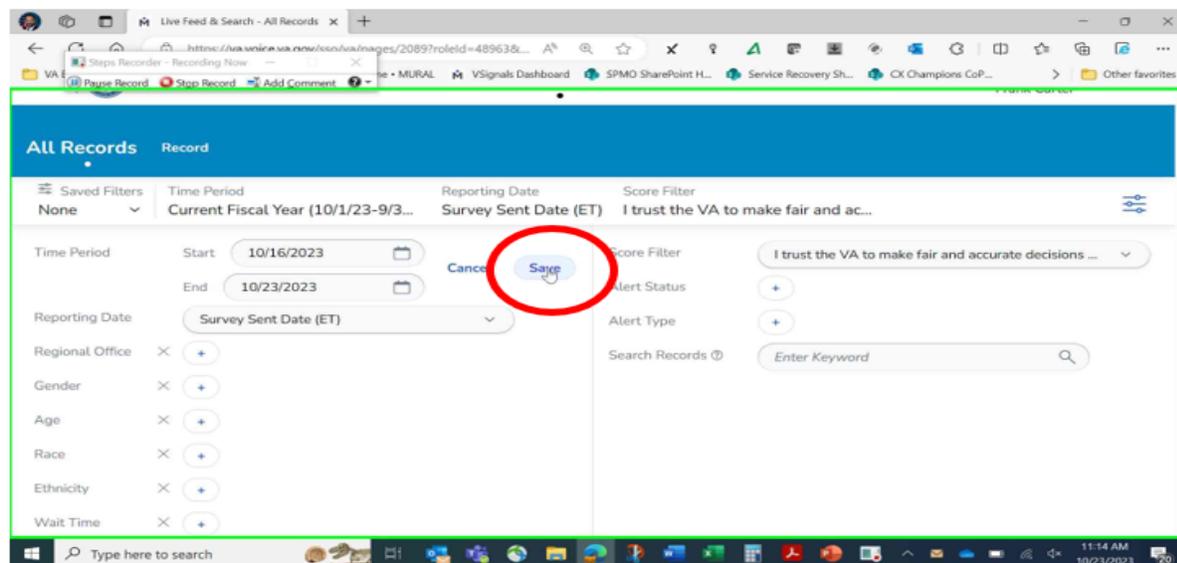


Step 3: Once you select “Live Feed & Search”, click in the “Time Period” area and (1) select an option from the dropdown or (2) click the plus icon on the right to enter a custom date range.

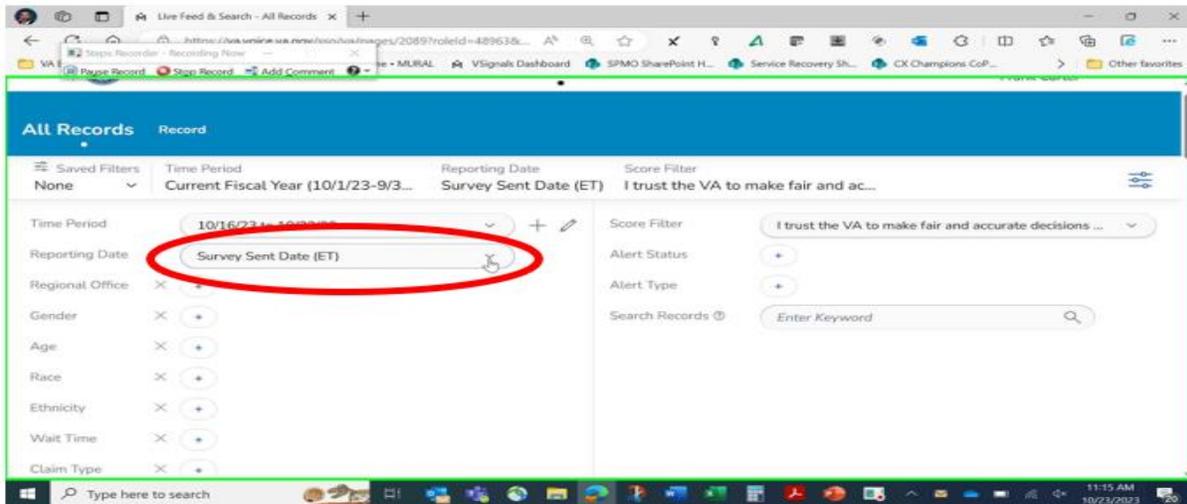


Note: The default “Time Period” option circled above may be different across surveys.

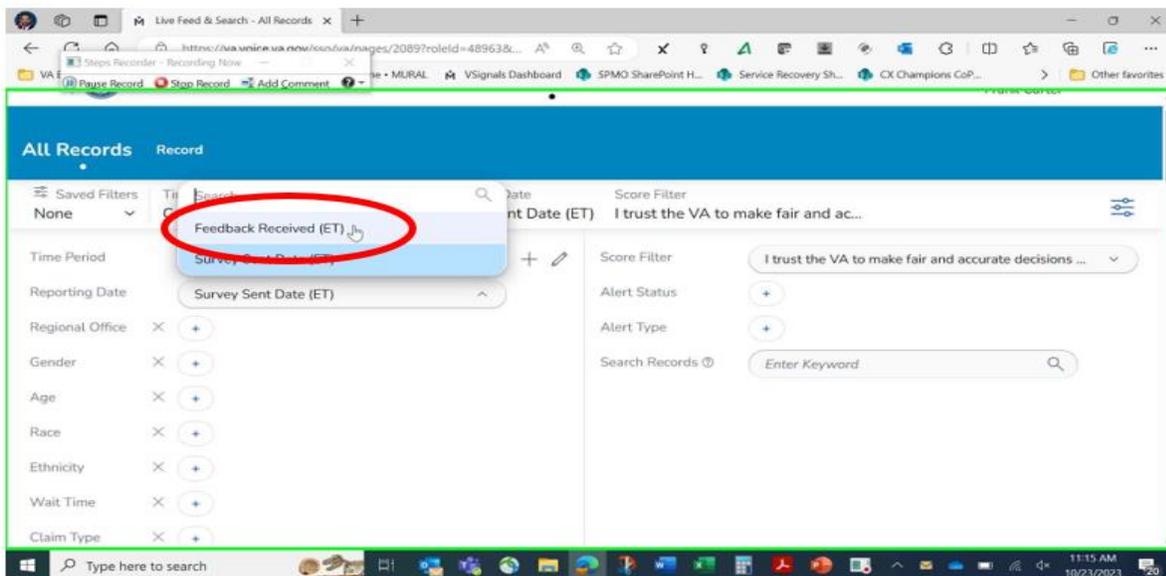
Step 4: Once a start date and end date are entered, select the “save” button located on the right. *Note the save button only appears when entering a custom date range.*



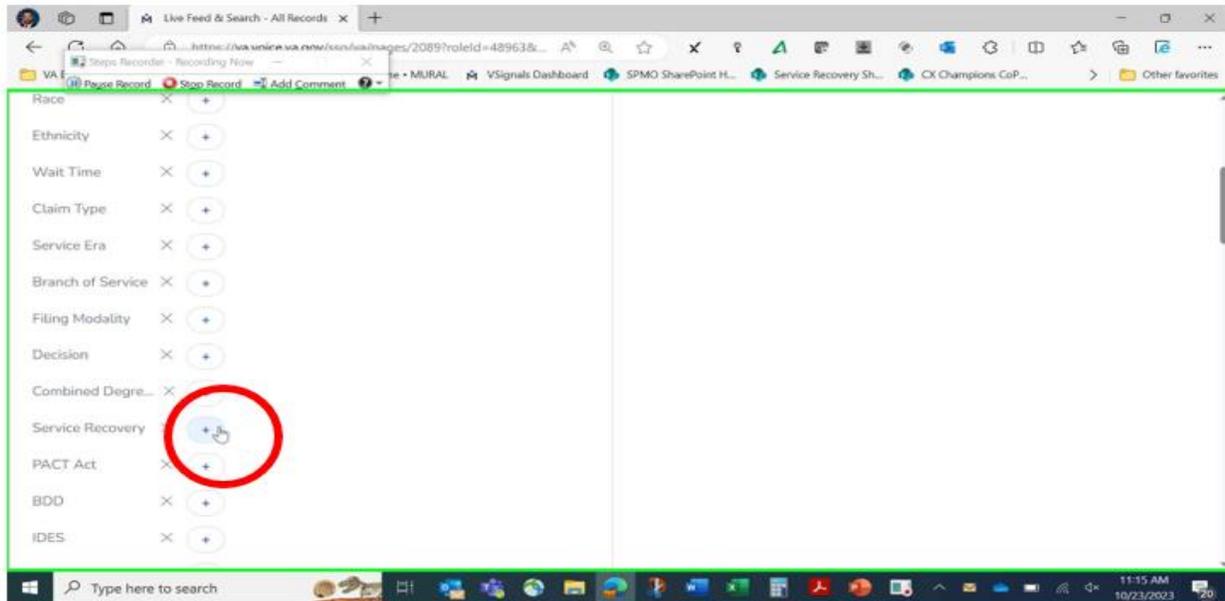
Step 5: The selected date range will now show on the screen. **“Survey Sent Date (ET)”** will appear under the date range. Select the drop-down on the **“Survey Sent Date (ET)”** button.



Step 6: Once the dropdown is selected, two options will appear: **“Feedback Received (ET)”** and **“Survey Sent Date (ET).”** Select **“Feedback Received ET.”** This will provide information regarding the survey feedback received during the time period requested above.



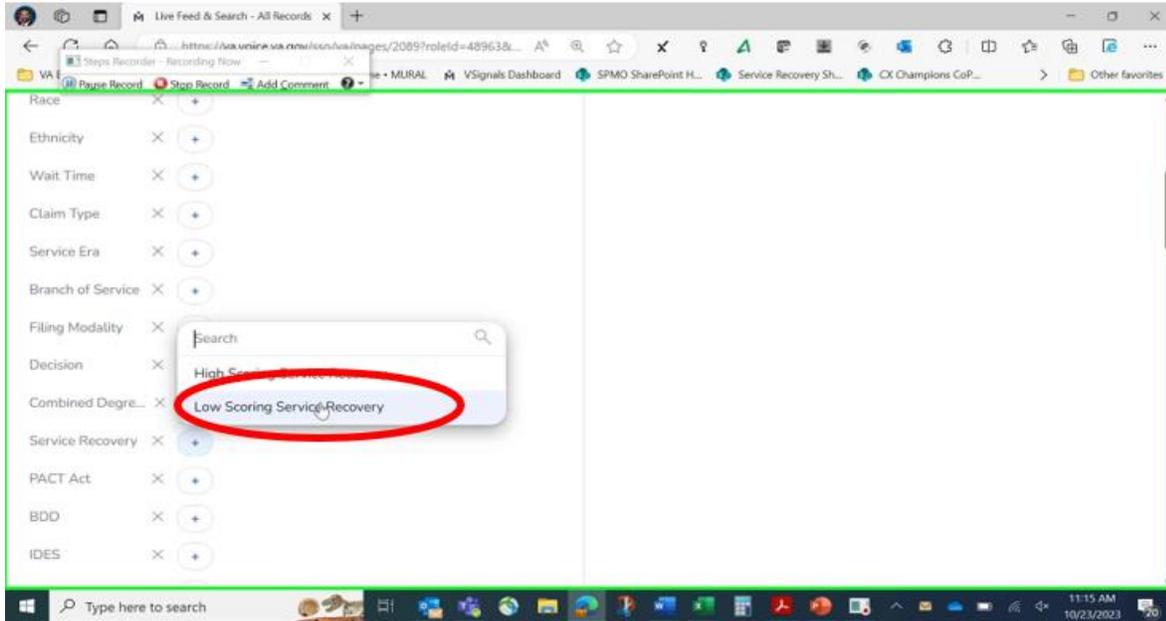
Step 7: From the filters located on the left side of the screen, select **“Service Recovery.”**



Step 8: After selecting the **“Service Recovery”** button, two additional options for filtering will be provided: **“High Scoring Service Recovery”** and **“Low Scoring Service Recovery.”**

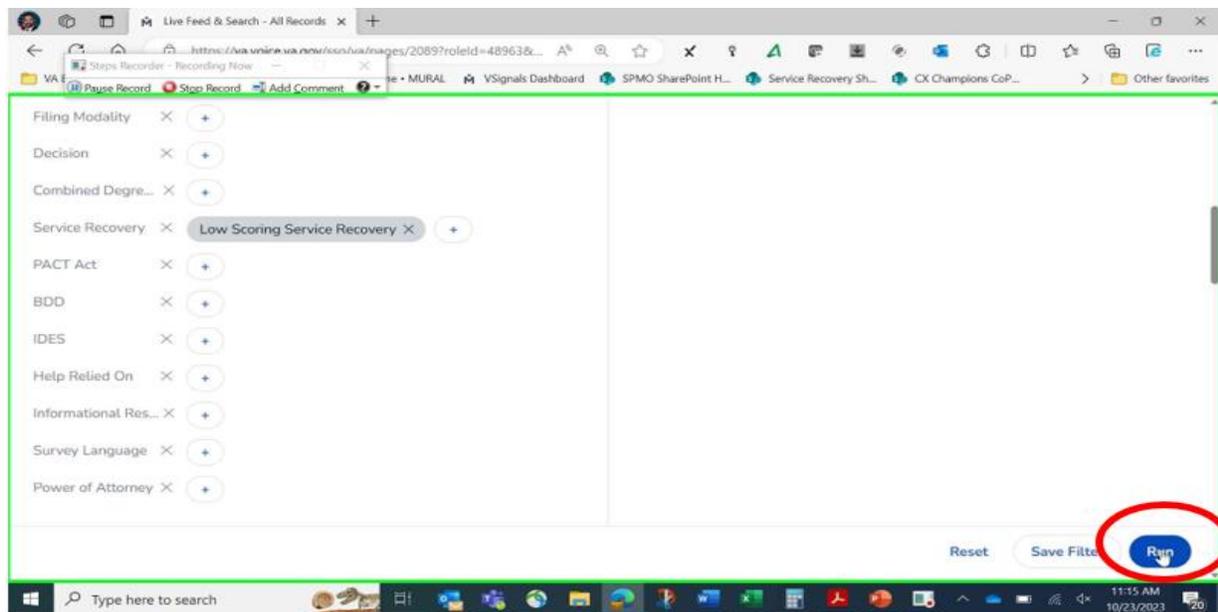
- **“High Scoring Service Recovery”** provides information regarding the high-scoring feedback surveys. This listing provides participant information from the survey respondents that provided a high score, indicating a pleasant experience.
- **“Low Scoring Service Recovery”** provides participant information of survey respondents with an overall low score; indicating they did not have a pleasant experience.

Select the **“High Scoring Service Recovery”** or the **“Low Scoring Service Recovery”**

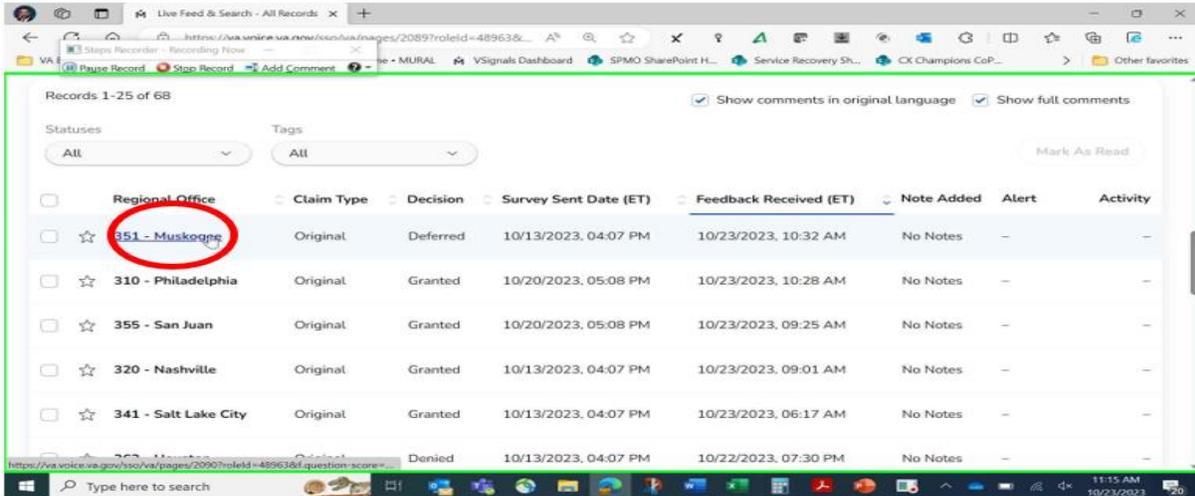


Note: The image illustrates the selection of the “Low-Scoring Recovery” for demonstration purposes.

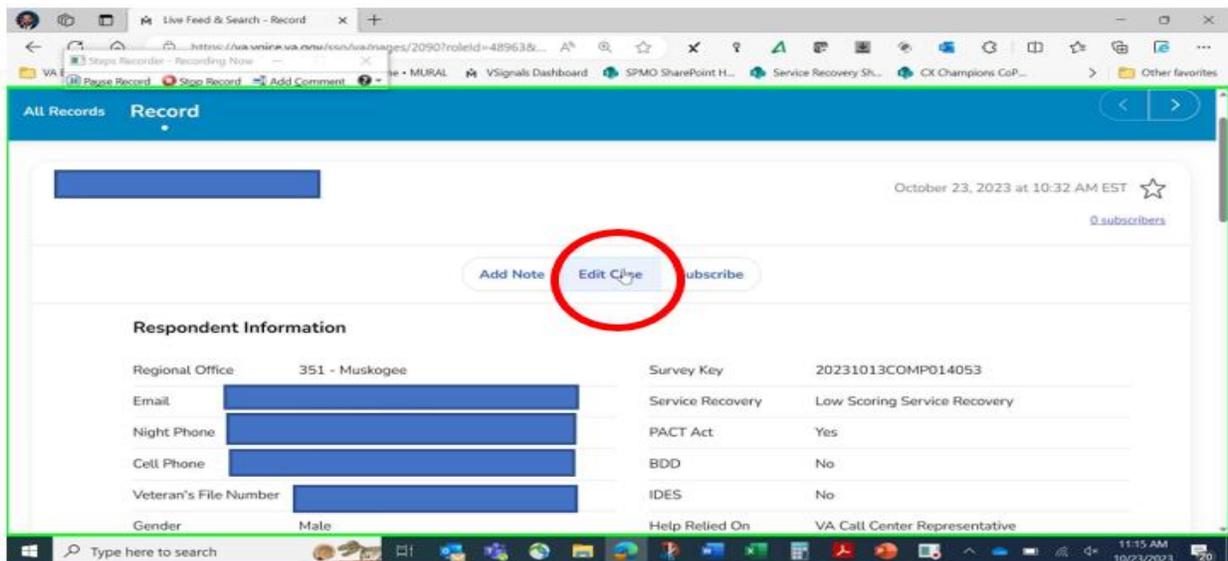
Step 9: Select the “Run” button located in the bottom right corner.



Step 10: Once the “Run” button is selected, the system will generate service recovery candidates for the date range entered earlier (Step 4). Each Regional Office or BL listed represents a survey respondent. Select anywhere in the highlighted row or check the box on the far-left side of the screen.



Step 11: The screen below will appear. Select the “Edit Case” button to enter information from the call.



Note: The blue lines indicate areas that include PII. On your screen, you will be able to see the Veteran’s name, file number, and contact information.

Once the “**Edit**” button is selected, either the low or high survey questions will appear on the screen. You will enter the information obtained from each question here.

Please complete additional follow-up Service Recovery Questions.

What could VA have done differently to meet your expectations of the claims process?

In-Survey Question: The [Informational Resource] helped me to know what to expect throughout the disability compensation claims process.

How could VA better communicate evidence needed to support your disability claim?

In-Survey Question: The VA communicated what evidence was needed to support my disability compensation claim.

How can VA improve the online platform and/or letters to provide more useful updates?

In-Survey Question: The online platform and/or letters gave me useful status updates throughout the disability compensation claims process.

Optional Question: Have the status updates been consistent from various sources (i.e. online, letters, VA reps)?

In-Survey Question: The online platform and/or letters gave me useful status updates throughout the disability compensation claims process.

What would be a reasonable amount of time to decide a claim? What is your understanding of VA’s timeliness goal to complete disability claims?

In-Survey Question: I received the results of my disability compensation claim in a reasonable amount of time.

How can VA’s notification letter better explain the reasons and basis for your disability claims decision?

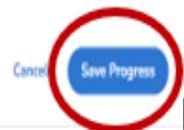
Periodically select “**Save Progress**” when entering the survey respondents’ feedback to ensure the information is captured. **The system will time out after 30 minutes of inactivity, and if you have not saved your progress, the information you entered will be lost.**

How can VA better communicate the different options available if you disagree with the claims decision?

In-Survey Question: I understood that I had additional options if I disagreed with my disability compensation claim decision (e.g. decision review, appeal).

* Service Recovery Status - 1st Attempt

- Needs Second Attempt
- Veteran Declined Participation
- Service Recovery Complete



When you scroll down the survey respondent's profile, you will be able to see all of the in-survey scores:

Supplemental Claim Survey

Schedule Exam Yes No

I understood the need for a VA examination to support my Supplemental Claim. 3

It was easy to identify what evidence I needed to support my Supplemental Claim. 3

I received the results of my Supplemental Claim in a reasonable amount of time. 2

I knew where to look for status updates about my Supplemental Claim while I waited for a decision. 3

VA's notification letter clearly explained the reasons and bases for my Supplemental Claim decision. 4

I am satisfied with VA's Supplemental Claim process. 4

Step 12: Once a survey respondent has been contacted, a radio button will indicate the activity that took place during the first call:

- Select **“Needs Second Attempt”** if no contact was made and a voice mail was provided, a message could not be left, the survey respondent requests a call back at a later time, etc.,
- Select **“Veteran Declined Participation button”** if the survey respondent indicates they do not want to participate; no additional calls are to be made to this survey respondent.
- Select **“Service Recovery Complete”** when the call is successful and after the survey respondent's feedback has been entered into the VSignals platform. A completed service recovery call will count towards the monthly strategy requirement.

In-Survey Question: I trust the VA to make fair and accurate decisions on disability compensation claims.

* Service Recovery Status - 1st Attempt

Needs Second Attempt

Veteran Declined Participation

Service Recovery Complete

Cancel Save

Respondent Information

Regional Office	351 - Muskogee	Survey Key	20231013COMP014053
Email	[Redacted]	Service Recovery	Low Scoring Service Recovery
Night Phone	[Redacted]	PACT Act	Yes
Cell Phone	[Redacted]	BDD	No
Veteran's File Number	[Redacted]	IDES	No
Gender	Male	Help Relied On	VA Call Center Representative

Note: The blue lines indicate areas that include PII. On your screen, you will be able to see the Veteran's name, file number, and contact information.

Step 13: Select the appropriate radio button and provide a thorough review of the responses received during the call because ***you cannot edit the record after you save it.*** Select the **“save”** button on the right side of the screen to ensure all edits for the survey respondent have been captured.

Should you find a record correction is necessary after selecting save, forward an encrypted email to the CX mailbox: VAVBAWAS/CO/VVSR. Entitle the email **“VSignals Profile Correction Request”** and provide the **“Survey Key number”** and detailed information about the change required.

In-Survey Question: I trust the VA to make fair and accurate decisions on disability compensation claims.

* Service Recovery Status - 1st Attempt

Needs Second Attempt

Veteran Declined Participation

Service Recovery Complete

Cancel Save

Respondent Information

Regional Office	351 - Muskogee	Survey Key	20231013COMP014053
Email	[Redacted]	Service Recovery	Low Scoring Service Recovery
Night Phone	[Redacted]	PACT Act	Yes
Cell Phone	[Redacted]	BDD	No
Veteran's File Number	[Redacted]	IDES	No
Gender	Male	Help Relied On	VA Call Center Representative

Note: The blue lines indicate areas that include PII. On your screen, you will be able to see the Veteran's name, file number, and contact information.

Storing Completed Call Information

Each week or as determined by the BL/PO and SPMO, service recovery and process improvement calls will be reviewed for accuracy. Once verified, the SRP using a call list will upload their completed call list to their BL/PO designated portal on the [VBA VSignals Service Recovery Community of Practice SP](#) page.

Completed call lists should capture the following data points:

- Name of the survey respondent
- Survey Type
- Race (if available)
- Ethnicity (if available)
- Contact Information (Email, Phone, etc.)
- Feedback Rec'd date
- Call Successful?
- Survey Questions and Feedback Responses
- Notes

When you have completed your call list, you will upload the completed call list to the [VBA VSignals Service Recovery Program Community of Practice SP](#) page.

1. Navigate to the site and select your BL/PO Portal



2. Click the Completed Call List Tab



3. Upload to the Call List Section



The BLs/POs using VSignals are not required to upload or store a call list on the SP site. The information entered during SR calls is stored in the VSignals platform.