Locating and Updating a Claimant Record

PMC VSR Core Course

Job Aid

February 2024

The job aid serves as a quick reference for locating and updating a claimant record. There are four sections of this job aid. Select the link to access the section to review:

1. Steps for Locating a Record by System
2. Information to Update by System
3. Indication an Update is Needed by System
4. Steps for Updating Claimant Information by System

**Steps for Locating a Record by System**

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| **System** | **Steps for Locating a Record** |
| **Modern Awards Processing Development (MAP-D)** | 1. Select VBAPPS
2. Select VETSNET folder
3. Select MAPD T11
 |
|  | 4. Select File |
|  | 5. Select Search |
|  | 6. Enter the file number on SSN |
|  | 7. Select OK |
| **Personnel Information Exchange System (PIES)** | 1. Select VBAPPS
2. Select PIES folder
 |
|  | 3. Select PIES Create T11 |
|  | 4. Select Search Existing |
|  | 5. Enter file number or SSN |
|  | 6. Select Submit to PIES |
| **SHARE** | 1. Select VBAPPS
2. Select Share T11
3. Select Search All in List
4. Enter file number or SSN in the Search Criteria
5. Select Submit

If record is found, SHARE provides a menu for BIRLS, Corporate, Payment, and PIF |

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| **Veterans Benefits Management System (VBMS)** | 1. Select VBAPPS
2. Select VBMS folder
3. Select VBMS
4. Enter file number or SSN in the Search box
5. Select Open eFolder
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 **Information to Update by System**

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| **System** | **Information to Update** |
| **MAP-D** | * Claim level suspense
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| **PIES** | * Create a 3101 (request for service information) with the service information record
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| **SHARE** | * BIRLS update
* Change of Address or Direct Deposit (CADD)
* Corporate flashes
* Pending Issue File (PIF)
* SSA inquiry
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| **System** | **Information to Update** |
| **VBMS** | * Document properties:
	+ Edit subject, receipt date, and document category/type
* Actions:
	+ Create new claim
	+ Upload documents
	+ Move evidence
	+ Manage duplicate evidence
* Claim update:
	+ Date of claim
	+ Claim label or incremental
	+ Contentions
	+ Special Issues
	+ Tracked Items
* VBMS notes
* Veteran profile:
	+ Name, mailing address, phone numbers, email address
* Dependents:
	+ Add or edit dependent information
* Manage evidence:
	+ Update or add unsolicited evidence
* SSA inquiry
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**Indication an Update is Needed by System**

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| **System** | **Indication an Update is Needed** |
| **MAP-D** | * Any change in the claim’s status
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| **PIES** | * Service documents are needed in connection with a claim for benefits
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| **SHARE** | * Update military service in the BIRLS record when VBMS fails
* New evidence containing a different Address or Direct Deposit information (CADD)
* New evidence containing a different Name (CADD)
* Evidence containing information pertaining to corporate flashes (i.e. homeless, fugitive felon, Veteran married to Veteran)
* New claims require an SSA inquiry (if unable to pull in VBMS)
* Update to EP is needed (correct EP or claim label, correct DOC)
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| **System** | **Indication an Update is Needed** |
| **VBMS** | * Evidence filed in the VBMS folder contains an incorrect receipt date or filed with the incorrect document type (mislabeled)
* Evidence requires subject notes be added to explain contents of document
* Evidence located in the incorrect eFolder
* Duplicate evidence received
* Internal document needs to be uploaded to the eFolder
* Update to EP is needed (EP, claim label, or DOC)
* Notes required (e.g. unsuccessful telephone attempts to claimant were made)
* New evidence received containing a different address (CADD)
* New evidence received containing a different name (CADD)
* New evidence received containing information about dependents that are not listed or already established in the Dependents tab
* New unsolicited evidence not listed in Manage Evidence tab
* Claim requires a SSA Inquiry
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**Steps for Updating Claimant Information by System**

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| **System** | **Function** | **Steps for Updating Information** |
| **MAP-D** | *Change Claim level suspense* | 1. After selecting the Claim Suspense Reason, a Claim Level Suspense date will automatically populate
2. If the Claim Level Suspense needs to be extended, select the appropriate End Product under Other Pending Claims
3. Select Claim Level Suspense
4. Update the Current Suspense Date with the new date
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| **PIES** | *Submit PIES 3101* | 1. Select Create (on left)
2. Enter the file number
3. Select Submit to PIES
4. Select Yes (if pop-up appears) or Submit to BIRLS (if no pop-up appears)
5. Enter date of claim and end product code
6. Select next page
7. Verify all service listed information is correct and it is under the correct branch.
8. Select the proper PIES request from the drop-down menu.
9. Select Add Request
10. Select Submit 3101 (yellow box)
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| **PIES** | *Edit PIES 3101* | 1. Select Search Existing (on left)
2. Enter the file number
3. Select Submit to PIES
4. Select the returned match
5. Select next page
6. Modify information as needed
7. Select Submit
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| **System** | **Function** | **Steps for Updating Information** |
| **PIES** | *Delete PIES 3101* | 1. Select Search Existing (on left)
2. Enter the file number
3. Select Submit to PIES
4. Select the returned match
5. Select next page
6. Select Delete 3101 (pink X)
7. Select Yes
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| **SHARE (if****unable to complete in VBMS)** | *BIRLS Update* | 1. Under Available Processes, select BIRLS Update
2. Enter Veteran’s First and Last name, select Submit
3. Update Service information, POA information or Veteran’s date of death
4. Select Update
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| **SHARE** | *CADD* | 1. Select Available Processes
2. Select Change of Address
3. Update address
4. Select Update

**NOTE:** This update will require the file number, benefit type, and payeenumber. |
| **SHARE** | *Corporate Flash* | 1. Select Available Processes
2. Select Corporate Flashes
3. Edit flash (move over necessary flash(es) from left to right)
4. Select Submit

**NOTE:** This update will require the file number or SSN. |

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| **System** | **Function** | **Steps for Updating Information** |
| **SHARE (if****unable to complete in VBMS)** | *Dependents* | 1. Select Available Processes
2. Select Dependents
3. Select Add to add a new dependent record or Modify to edit an existing dependent’s record
4. Select Update

**NOTE:** This update will require the file number and payee number. |
| **SHARE (if****unable to complete in VBMS)** | *PIF Change* | 1. Under Available Processes, select PIF Change
2. Enter Veteran’s file number, benefit type, payee number, claim type
3. Select Submit
4. Change necessary data
5. Select Update
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| **SHARE (if****unable to complete in VBMS)** | *SSA inquiry* | 1. Under Available Processes, select SSA Inquiry
2. Enter Veteran’s file number
3. Enter SSN, first name, last name, DOB and inquiry reason (Verify Benefits)
4. Choose appropriate: Vet SSN or Non- Vet SSN
5. Select Submit
6. Save screens to PDF
7. Upload PDF to VBMS

**NOTE**: This update will require the file number, as well as the SSN, DOB and name for each person to request SSA payment information. If requesting for a dependent, the dependent must beadded in the Dependents tab prior to the SSA Inquiry. |

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| **System** | **Function** | **Steps for Updating Information** |
| **VBMS** | *Document details (subject, date of receipt, and document type)* | 1. Select desired document
2. Select Document Properties
3. Select Editable Properties
4. Make necessary edits
5. Select Save
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| **VBMS** | *Move documents to other eFolder* | 1. Select desired document
2. From Actions drop down, choose Move
3. Enter file number of correct eFolder, click Lookup.
4. If correct record was identified, click Move Documents.
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| **VBMS** | *Upload documents to eFolder* | 1. From Actions drop down, choose Upload Document
2. Find file to upload (must be a PDF)
3. Choose appropriate Category – Type of the document you are uploading
4. Choose appropriate Content Source (will usually be VBMS unless specified differently in the manual)
5. Enter date of receipt
6. Select Upload
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| **System** | **Function** | **Steps for Updating Information** |
| **VBMS** | *PIF Change* | 1. Click on the Claims drop down
2. Choose pending EP to correct
3. Click on the edit icon
4. Make corrections
5. Select Save
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| **VBMS** | *Contentions or Special Issue change* | 1. Click on the Claims drop down
2. Choose pending EP
3. From the Contentions List chevron, click on Contention to edit
4. Make changes
5. Select Save
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| **VBMS** | *Add Contentions* | 1. Click on the Claims drop down
2. Choose pending EP
3. From the Contentions List chevron, click on Add Contention
4. Complete fill ins
5. Select Save
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| **VBMS** | *Notes* | 1. Select Add Note icon

(located in menu containing Veteran, Claims, Documents, Rated Issues and Notes)1. Enter note text
2. Select Save
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| **VBMS** | *Veteran’s Profile* | 1. Click on the edit icon for the information to edit
2. Make changes
3. Click the save icon
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| **System** | **Function** | **Steps for Updating Information** |
| **VBMS** | *Dependents (add)* | 1. Click on the Veteran drop-down, then Dependents.
2. Select “Create New Dependent”
3. Add information regarding dependent
4. Click the save icon
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| **VBMS** | *Dependents (edit)* | 1. Click on the Veteran drop-down, then Dependents.
2. Click on the edit icon for the dependent to edit
3. Make changes
4. Click the save icon
 |
| **VBMS** | *SSA Inquiry* | 1. From Actions drop down, choose SSA Inquiry
2. Choose Individual
3. Select Submit Inquiry
4. Select Save to eFolder
5. If needed, repeat for dependents
 |
| **VBMS** | *Tracked Items* | 1. Enter file number or SSN
2. Select Open Profile
3. Click on the Actions drop-down, then Manage Evidence
4. Check the box next to the tracked item to be updated
5. Update evidence as needed (received, closed, cancelled)
6. Select Add Evidence
7. Select Complete
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**Individual Longitudinal Exposure Record (ILER)**

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| **System** | **Information to Update** |
| **ILER** | * Access to ILER must be requested.
* Once users have completed the required training and downloaded their certificates, access can then be requested.
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| **ILER** | * Users can request ILER access by first logging in using their Personal Identity Verification Card (PIV) on the ILER site [ILER Login](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Filer.csd.disa.mil%2Filer%2Fapp%2Fhipaa%3Fexecution%3De1s1&data=05%7C01%7C%7Ca70d5dbf21014a4a173108dafd43d659%7Ce95f1b23abaf45ee821db7ab251ab3bf%7C0%7C0%7C638100765043713092%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=D7zLzC63jrFiffV7SIh5ksrauF22iTll9fn0CNjNaiw%3D&reserved=0) and then clicking the link to request access.
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| **ILER** | * ILER requires annual completion of the TMS courses #10203 and #10176. Submission of the TMS certificates is NOT required once they are uploaded during the initial request for access. Instead, the user must manually update the certificate dates by editing Account Details (in ILER) under My Profile located on the left side of the screen. It is recommended that users ensure all account details are correct and TMS dates are updated to maintain access to the ILER system.
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