







TVB Live Webinar: Notes, Communications, & Alerts

Key Takeaways

May 20, 2025

-  **Note vs. Communication.** A Note Record should be used to communicate important information to another VSO or CSO. A Communication Record should be used to document communication between the VSO or CSO and a third party, such as the Veteran, a dependent or VA.
- **Veteran-Related or Claim-Related Record.** You can create a Note Record as either a Veteran-Related or Claim-Related Record.
 - A Veteran Note Record will not  be visible in a Claim Record.
 - A Claim Note Record will not  be visible in the Veteran Record.
-  **Attaching a File.** You can attach a file to either a Veteran or Claim Note Record. It will not be available in the Veteran Document Record unless added separately.
 -  If you delete the Note Record, the file is also deleted.
-  **Scan for Note Alerts.** Note Alerts indicate that a Veteran record has important information a user should view before interacting with that Veteran.
- **Notes & Communications = Better Customer Service.** Taking a few minutes to add concise Note and/or Communication Records will benefit all TVB users.

I need more:

- [TVB Live Webinar](#): Notes, Communications & Alerts
- [TVB User Guide 4.1.0](#) - 7.1 Veteran Dashboard Add Note; 7.1.1. Note Alerts; 7.2 Veteran Dashboard Add Vet Comm; 10.7 Veteran-Related Records Create a Veteran Communication Record; 10.8 Veteran-Related Records Create a Veteran Note Record; 11.5 Claim-Related Records Create a Note Record; 12 Communication Logs