Tennessee Department of Veterans Services
Service Officer VetraSpec Claims Filing Standard Operating Procedure (SOP)
Ver 2.1

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Updated: 10/10/2023

VetraSpec Check-list

Done in order with every Veteran encounter

Visually inspect the VS Profile Dashboard for:

1. ☐ Your name and county/field office
   If you are working with the Veteran, change to your name, leave the County
   This is how we track EOM claim numbers. If you want credit, change the name.

2. ☐ Your RDs name in the 'Claims Managed By'

3. ☐ Complete & correct address, including a zip code

4. ☐ A phone number

5. ☐ If applicable, the email format is correct
   It has the @ symbol and a .com or other designation

6. ☐ A DOB in the profile

7. ☐ There is an acceptable POA listed at the top of the page
   TDVS can represent TDVS, VFW and American Legion
   Be aware of your own credentials

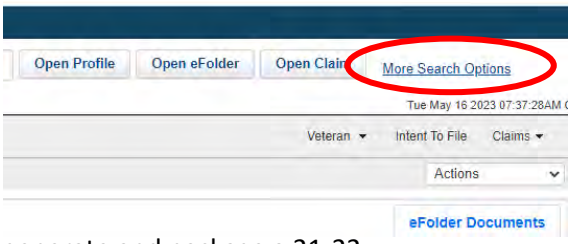
VBMS Check-list

☐ Does VBMS open

If not, is there a recent POA in VS

If yes, in VBMS - use the 'More Search Options' link to do a name/DOB search

Someone could have made a data-entry error

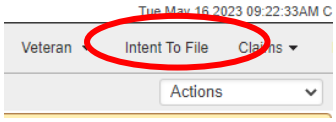


If no, generate and package a 21-22

☐ Does POA in VBMS match the VS profile

☐ Is there an active Intent to File

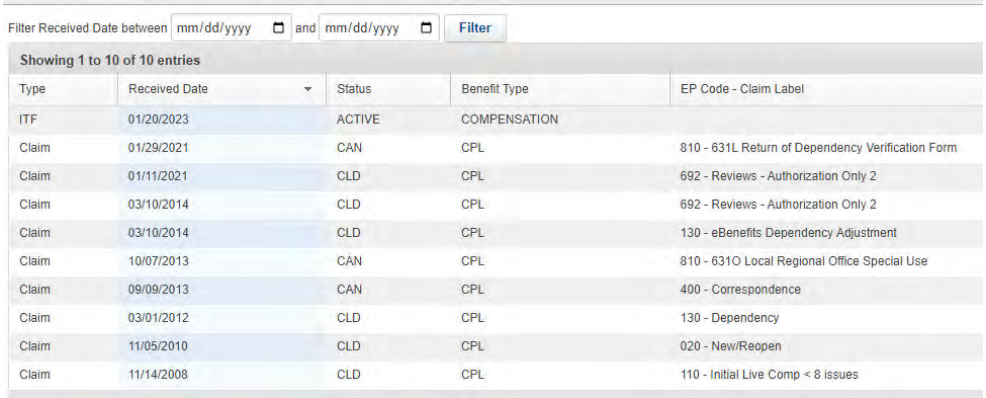
To check for an ITF in VBMS, click the Intent To File link



An active Intent usually shows on this screen

If there is nothing on this list, click the 'Claims and ITF Combined Display' botton to double-check

The screen gives historic claim and ITF information, including



Type	Received Date	Status	Benefit Type	EP Code - Claim Label
ITF	01/20/2023	ACTIVE	COMPENSATION	
Claim	01/29/2021	CAN	CPL	810 - 631L Return of Dependency Verification Form
Claim	01/11/2021	CLD	CPL	692 - Reviews - Authorization Only 2
Claim	03/10/2014	CLD	CPL	692 - Reviews - Authorization Only 2
Claim	03/10/2014	CLD	CPL	130 - eBenefits Dependency Adjustment
Claim	10/07/2013	CAN	CPL	810 - 631O Local Regional Office Special Use
Claim	09/09/2013	CAN	CPL	400 - Correspondence
Claim	03/01/2012	CLD	CPL	130 - Dependency
Claim	11/05/2010	CLD	CPL	020 - New/Reopen
Claim	11/14/2008	CLD	CPL	110 - Initial Live Comp < 8 issues

D2D Process

Used for 2122 and 21-0966 ITF from the Forms tab ONLY, no other forms are sent via D2D

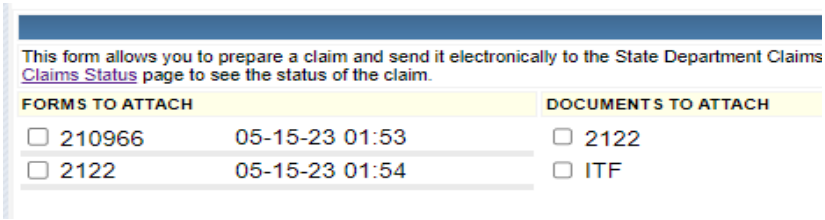
If there is both a 2122 and ITF in the package, ***ALWAYS send the 2122 first and alone***
To use D2D - the 21-22 and 21-0966 ***MUST*** be a Form submission with a digital signature

If the ITF is for Pension or a Survivor/Claimant
These *MUST* be sent via Direct Submit to 'Pension' to ensure VA establishes it

After Forms are prepared, reviewed & ready to send to VA, start the D2D process…

Click on the 'Package a Claim' tab

Identify the form on the 'Forms To Attach' list *(remember, 21-22 first)*

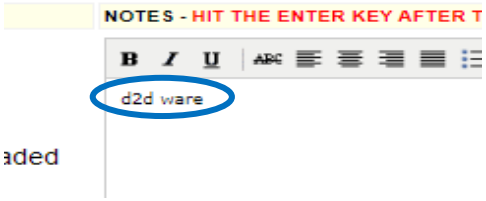


Under **'Forms to Attach'**

Click the box next to the form to be sent D2D *(is this the correctly dated form)*

Remember - 21-22 first *(and alone)* , then ITF…*separate D2D submission* after the 21-22

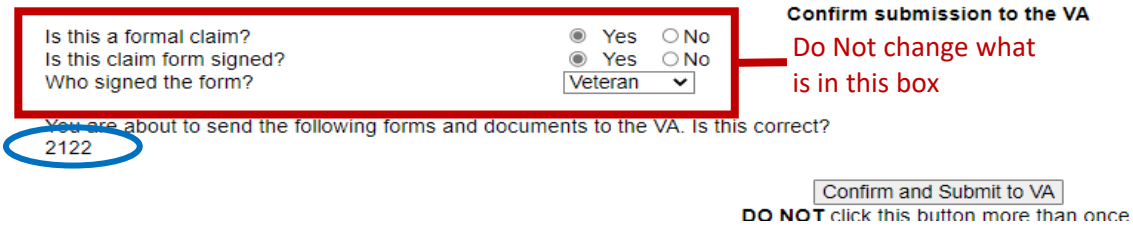
Place the cursor in the 'Notes' box - type 'd2d' and user last name 'd2d ware'



Click 'Send to VA' - this brings up the confirmation box

Visually confirm the form to be packaged is on the list *(see blue circle below)*

Do not change any of the 3 question responses - VS generates this

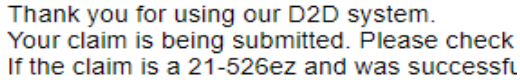


Is your form listed **- yes**, proceed to the next step

If no, click the 'Package a Claim' tab and start the D2D process again

(This will generate a default entry on the package a claim list, leave it)

Click 'Confirm and Submit to VA' - ***message:*** Thank you for usuing our D2D system



Click the 'Package a Claim' tab again

Scroll down to the 'Claim History and Status' window - an initial note from VS appears

Look for a success message - 21-22 Power of Attorney

VS initially generates blue notes that have the word 'Success', this is *NOT* complete

These notes only mean the submission has started

Fake Success Message

DATE SENT	STATUS (D2D ERROR CODES)	FORMS SENT
08-09-2023	**Claim filed with VA on:** 2023-08-09 11:06:36 **VA response:** Success-Attachment has been submitted successfully. **Current Status:** State filed on: 08-09-2023	• 21-22

Fake Success Message

DATE SENT	STATUS (D2D ERROR CODES)	FORMS SENT
08-09-2023	**Claim filed with VA on:** 2023-08-09 11:07:28 **VA response:** Success-Form 21-22 Successfully Processed, and POA 020 has been established, Submission ID vs_tn_64d3ab6e07d23 08/09/2023. The process to upload to veteran's efolder of 1 attachments has begun. **Current Status:** State filed on: 08-09-2023	• 21-22

With these 2 fake success notes, click the 'Package a Claim' tab again and scroll down

Do this until the following green note is gained - *this is ONLY for the 21-22*

The note *MUST* have 'Failed - None' at the end. This is SUCCESS!

SUCCESS!

DATE SENT	STATUS (D2D ERROR CODES)	FORMS SENT
08-09-2023	**Claim filed with VA on:** 2023-08-09 11:07:56 **VA response:** Success-Form 21-22 Successfully Processed, and POA 020 has been established, Submission ID vs_tn_64d3ab6e07d23 08/09/2023 - Upload to veteran's efolder of 1 attachments with the following Transmission IDs: Successful - vs_tn_ftans64d3ab6f7758 Failed - None **Current Status:** State filed on: 08-09-2023	• 21-22

If there is an error code, it will be red text that does not indicate success

This… (dots in the phone number is not an acceptible format)

DAYTIME PHONE:	(904) 392.8079
EVENING PHONE:	(904) 392.8079
CELL:	(904) 3928079

Results in this red note (or similar)…

05-13-2022	**Claim filed with VA on:** 2022-05-13 12:06:09 **VA response:**808-Data validation error(s): (1) Claimant:DayPhone:phoneNumber only accepts numeric space ()- (2) Claimant:EvePhone:phoneNumber only accepts numeric space ()- State filed on: 05-13-2022 Sent to state on: 05-13-2022	2122

Correct the error and try D2D again

If a second attemp at D2D does not work and the form is correct,

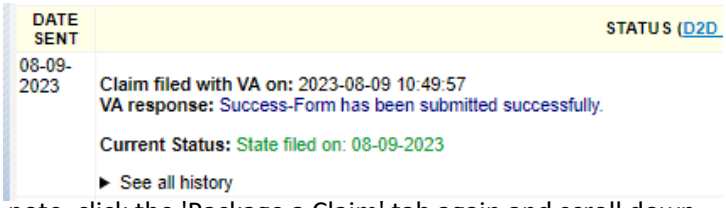
use the Direct Submit process

Look for a success message - 21-0966 Intent to File

VS initially generates a note that has the word 'Success', this is *NOT* complete

It only means the submission has started

Fake Success Message

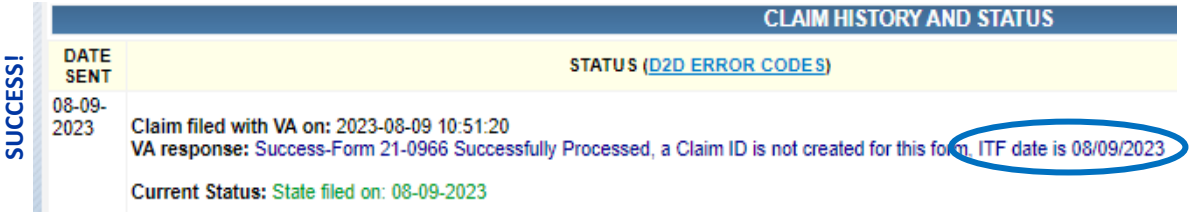


With this note, click the 'Package a Claim' tab again and scroll down

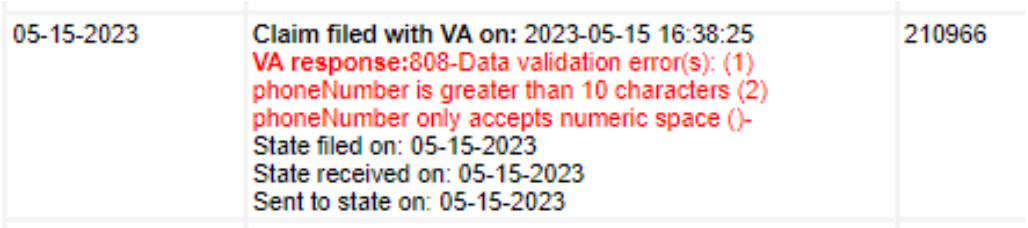
Do this until the following blue note is gained - *this is ONLY for the ITF*

The note MUST have '**ITF date is xx/xx/xxxx**' at the end. This is SUCCESS!

SUCCESS!



If there is an error code, it will be red text. This is *NOT* successful.



Correct the error and try D2D again

If a second attemp at D2D does not work and the form is correct,

use the Direct Submit process

Direct Submit Process
Can be used for all Forms/Documents *except* ...
DO NOT SEND the 10182 or the 20-0996 (HLR)

Once the forms/documents are ready to send to VA
If there is both a 21-526ez and a 20-0995 (Supplemental), send separate submissions
Per the RO - this is so both claims are properly established in VBMS and worked

After Forms are prepared & ready to send to VA, start the Direct Submit process…

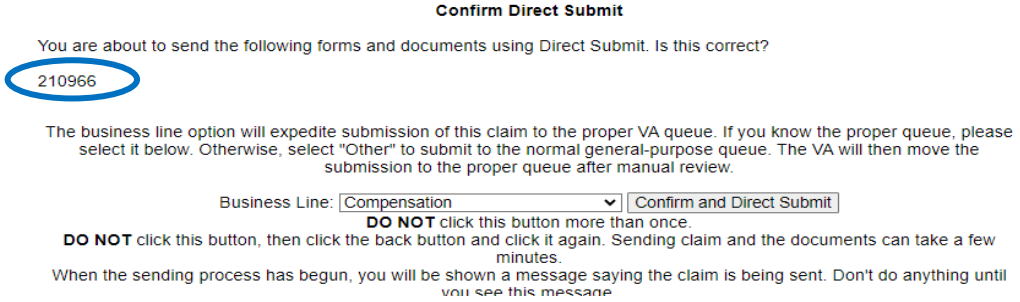
Click the 'Direct Submit' tab

Check the History/Status box to ensure the form/document has not been sent prior

Click the box(es) next to the form(s)/document(s) to be sent to VA

Click the 'Direct Submit' button - this brings up the confirmation screen

Visually confirm the form(s)/document(s) to be sent to VA are on the list



If yes, move to next step down *'To proceed'*

If no, click the 'Direct Submit' tab and start the process again

This creates an error entry in the History/Status box, leave it

Date sent	Status (Status Details)	Forms sent
03-23-2023	**Direct Submit on:** 0000-00-00 00:00:00 **GUID:** 0 **Status as of: 2023-03-23 16:39:39 SENDING**	218416

To proceed:

From the drop-down menu - choose the appropriate benefit type

Click 'Confirm and Direct Submit' - ***wait for message:*** Your documents are being uploaded

Your documents are being uploaded.

Click the 'Direct Submit' tab again

Scroll down to the History/Status box

Look at the direct submit note to the left of the status box - it will show 'pending'

Date sent	Status (Status Details)	Forms sent
04-20-2023	**Direct Submit on:** 2023-04-20 14:41:30 **GUID:** 405c283e-8d61-4895-b3f9-11412ec8292e **Status as of: 2023-04-20 14:41:2[illegible] PENDING**	2122

Click the 'Check Status' link at the far right of the status box

Sent by	Action
Lisa Ware	Check Status

Scroll down to the History/Status box

If the status is 'pending' or changes to 'uploaded' - click the 'Check Status' link again

Scroll/check status until one of the following notes is gained

Received *(or better)*

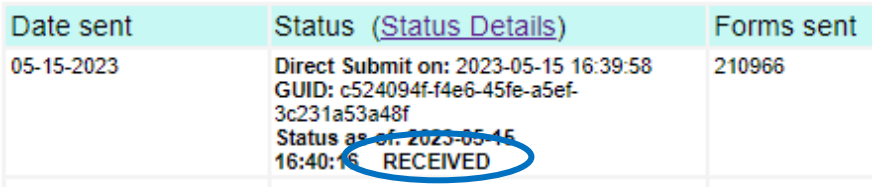
Processing

Success

VBMS

NOTE: sending, pending, and uploaded are not successful - keep checking

If an error presents (red text) and you cannot decipher it, contact your RD for assistance



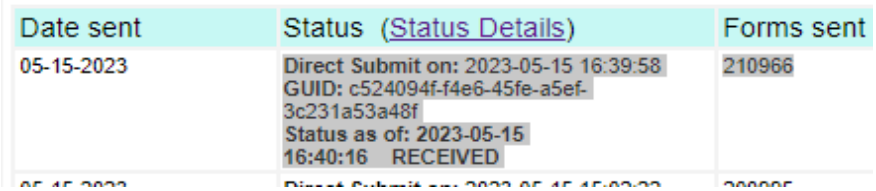
Date sent	Status (Status Details)	Forms sent
05-15-2023	**Direct Submit on:** 2023-05-15 16:39:58 **GUID:** c524094f-f4e6-45fe-a5ef-3c231a53a48f **Status as of:** 2023-05-15 16:40:16 RECEIVED	210966

Once the 'Received' *(or better)* note is gained

Use the cursor to highlight the entire Received note from the status box

Capture the status note (no need to capture the date), and any forms and/or documents

(ex. Note what is captured in gray)



Date sent	Status (Status Details)	Forms sent
05-15-2023	**Direct Submit on:** 2023-05-15 16:39:58 **GUID:** c524094f-f4e6-45fe-a5ef-3c231a53a48f **Status as of:** 2023-05-15 16:40:16 RECEIVED	210966

Right click on the highlighted text and choose 'Copy'

After highlighting and clicking copy on the Direct Submit received note

Make a notation for the submitted package on the Package a Claim tab

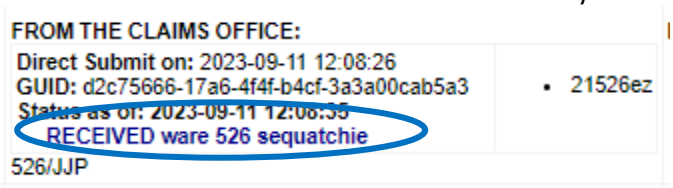
Click the 'Package a Claim' tab

In the 'Notes' box - right click and paste the status note

Choose one of the following 4 appropriate notations for the Received note

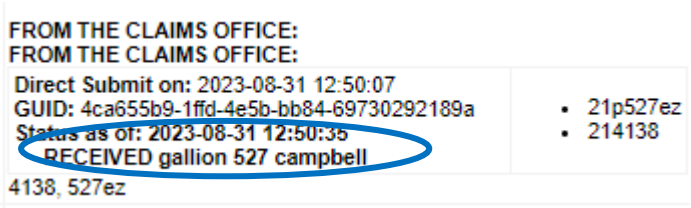
1 For a **526ez** package

Place the cursor at the end of the word 'Received' - add your last name, 526, county or FO



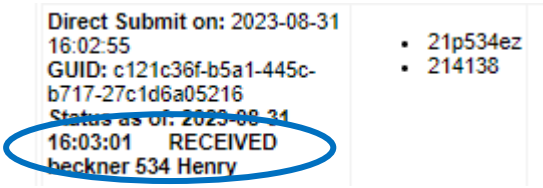
2 For a **527ez** package

Place the cursor at the end of the word 'Received' - add your last name, 527, county or FO



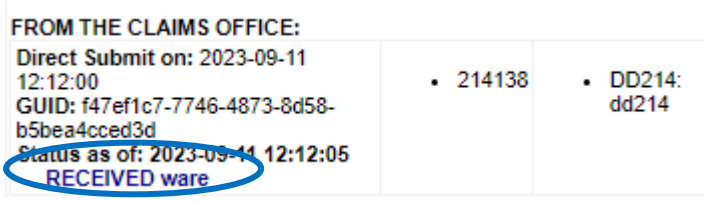
3 For a **534ez** package

Place the cursor at the end of the word 'Received' - add your last name, 534, county or FO



4 For all other forms/documents

Place the cursor at the end of the word 'Received' and add your last name name



Once the appropriate notation is added

Click 'Send to state' - ***this generates a message:*** The claim was successfully sent

Click the 'Package a Claim' tab again - scroll down to the History/Status window

Visually check that the newly created package note is at the top of the list

This part of the process has been disabled by TylerTech with the last upgrade…stay tuned…

Click 'Edit' to the right of the new package box

From the drop-down box to the right (the default is 'Submitted') - choose 'Filed'

Click 'Send' again

Click 'Package a Claim' once more - scroll down to the History/Status window

Look for the line on top of the box - 'From the CVSO Office'

This is a successful Direct Submit

Currently Disabled

Bright Line Issues that will be returned to RD

When an issue is sent back through the RD via email
The package will be marked **Need More Information** in the package history/status
The CSO/VSO must submit a new *complete* package to include the asked for correction and any forms and/or documents submitted with the first package

1. VS Profile missing any of the following
   Veteran Name (or Claimant Name, if applicable)
   Address with correct zip code (to include claimant if applicable)
   Social Security Number
   Date of Birth

2. Forms with no signature(s)

3. VS submission errors (red text)

4. POA in VS profile is marked 'No POA' or an organization we do not represent
   We represent TDVS, VFW & America Legion

5. 21-22 marked TDVS for an out-of-state Veteran/Claimant
   This is only good for BDD claims
6. 21-22 with boxes 19 & 21 not marked

7. 21-0966 ITF with no Benefit type selected

8. Forms that will not open
9. Forms that are not in PDF format (i.e. JPEG, Word documents)
10. Forms that are password protected