



Lesson 3

VA Systems: VBMS, Privacy Training, and TRIP

American Legion DSO School

March 2022

Lesson 3 Learning Objectives

Understand the requirements for and how to use and access three VA electronic systems:

- **VBMS:** Learn how documents are uploaded and how to use the VBMS interface.
- **Privacy Training:** Learn about VA's privacy training in order to access VA information systems.
- **TRIP:** Learn about VA's TRIP training to complete accreditation.

Veterans Benefits Management System (VBMS)

VBMS

- Viewing a Veteran's digital file is just the one piece of VBMS that is available to accredited Veterans Service Officers (VSOs).
- VBMS is a large suite of tools used by VA employees.
- If you have document issues with VBMS, a VA employee will likely have the same issues.



VBMS and Scanning



- All VA disability claims are processed “paperlessly” by VA.
- All paper is scanned by VA into PDF format.
 - Some documents come from legacy paper files. These were scanned, and additional documents have been uploaded directly into VBMS.
- Younger Veterans have only had virtual files.

VBMS and Scanning Problems

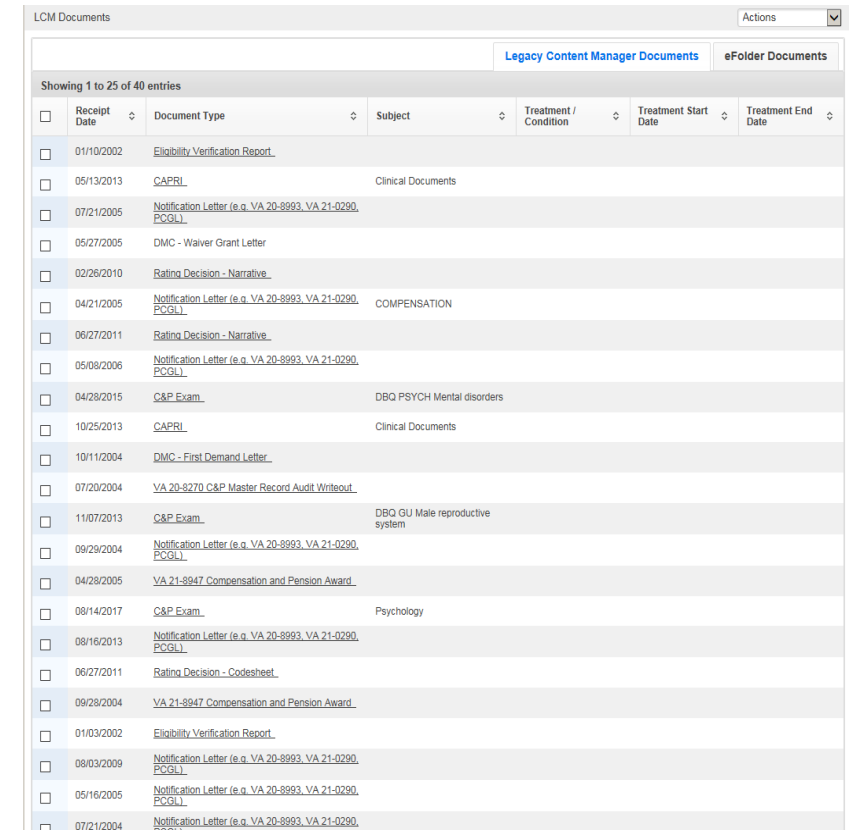


- There are pervasive problems in these areas when legacy paper files were scanned into VBMS:
 - Dates
 - Labels
 - “Chunking”
 - Legibility

Finding and understanding documents in VBMS can be challenging.

VBMS and Legacy Content Manager

- VBMS has a separate tab for documents in the Legacy Content Manager (LCM).
- LCM documents were uploaded to Virtual VA before VBMS was created.
- LCM documents may be duplicates, but not always.
- Veteran medical records are kept in CAPRI, VA's "Compensation and Pension Record Interchange."



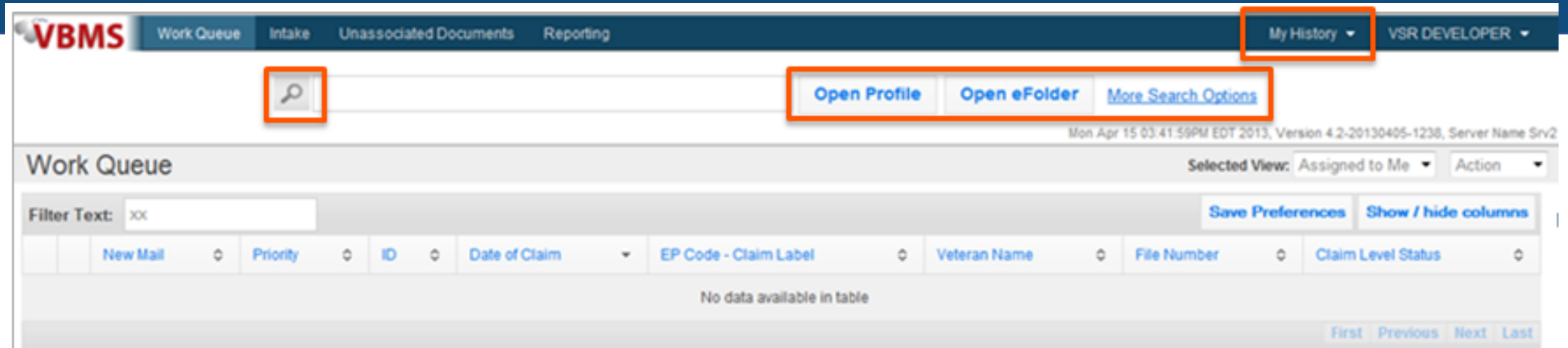
The screenshot displays the Legacy Content Manager (LCM) interface. At the top, there are tabs for "Legacy Content Manager Documents" and "eFolder Documents". Below the tabs, a table lists documents with columns for Receipt Date, Document Type, Subject, Treatment / Condition, Treatment Start Date, and Treatment End Date. The table shows various document types such as "Eligibility/Verification Report", "CAPRI", "Notification Letter", "DMC - Waiver Grant Letter", "Rating Decision - Narrative", and "C&P Exam".

Receipt Date	Document Type	Subject	Treatment / Condition	Treatment Start Date	Treatment End Date
01/10/2002	Eligibility/Verification Report				
05/13/2013	CAPRI	Clinical Documents			
07/21/2005	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
05/27/2005	DMC - Waiver Grant Letter				
02/08/2010	Rating Decision - Narrative				
04/21/2005	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)	COMPENSATION			
06/27/2011	Rating Decision - Narrative				
05/09/2006	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
04/28/2015	C&P Exam	DBQ PSYCH Mental disorders			
10/25/2013	CAPRI	Clinical Documents			
10/11/2004	DMC - First Demand Letter				
07/20/2004	VA 20-8270 C&P Master Record Audit Writeout				
11/07/2013	C&P Exam	DBQ GU Male reproductive system			
09/29/2004	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
04/28/2005	VA 21-8947 Compensation and Pension Award				
08/14/2017	C&P Exam	Psychology			
08/16/2013	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
06/27/2011	Rating Decision - Codesheet				
09/28/2004	VA 21-8947 Compensation and Pension Award				
01/03/2002	Eligibility/Verification Report				
08/03/2009	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
05/16/2005	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				
07/21/2004	Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)				

Advocacy Tip: Remember to check for CAPRI files in LCM.

Tips on Using VBMS

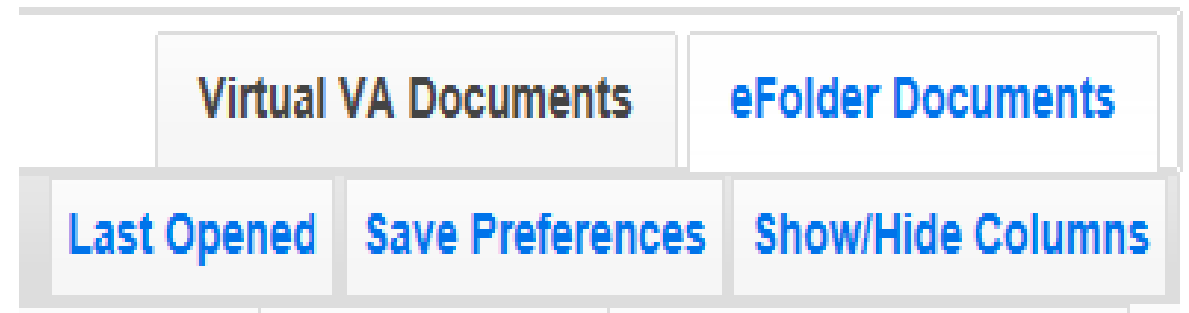
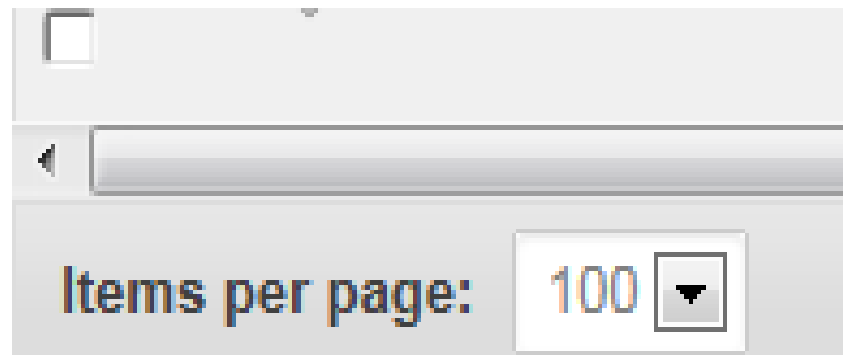
Opening the eFolder



- Select the **magnifying glass** to reveal the last 10 or so searches.
- Select **Open Profile** after entering claim number to go directly to Veteran Profile screen.
- Selection **Open eFolder** after entering claim number to go directly to the eFolder.
- Select **More Search Options** to perform additional searches.
- Select **My History** to show the last 10 or so VBMS screens you've visited.

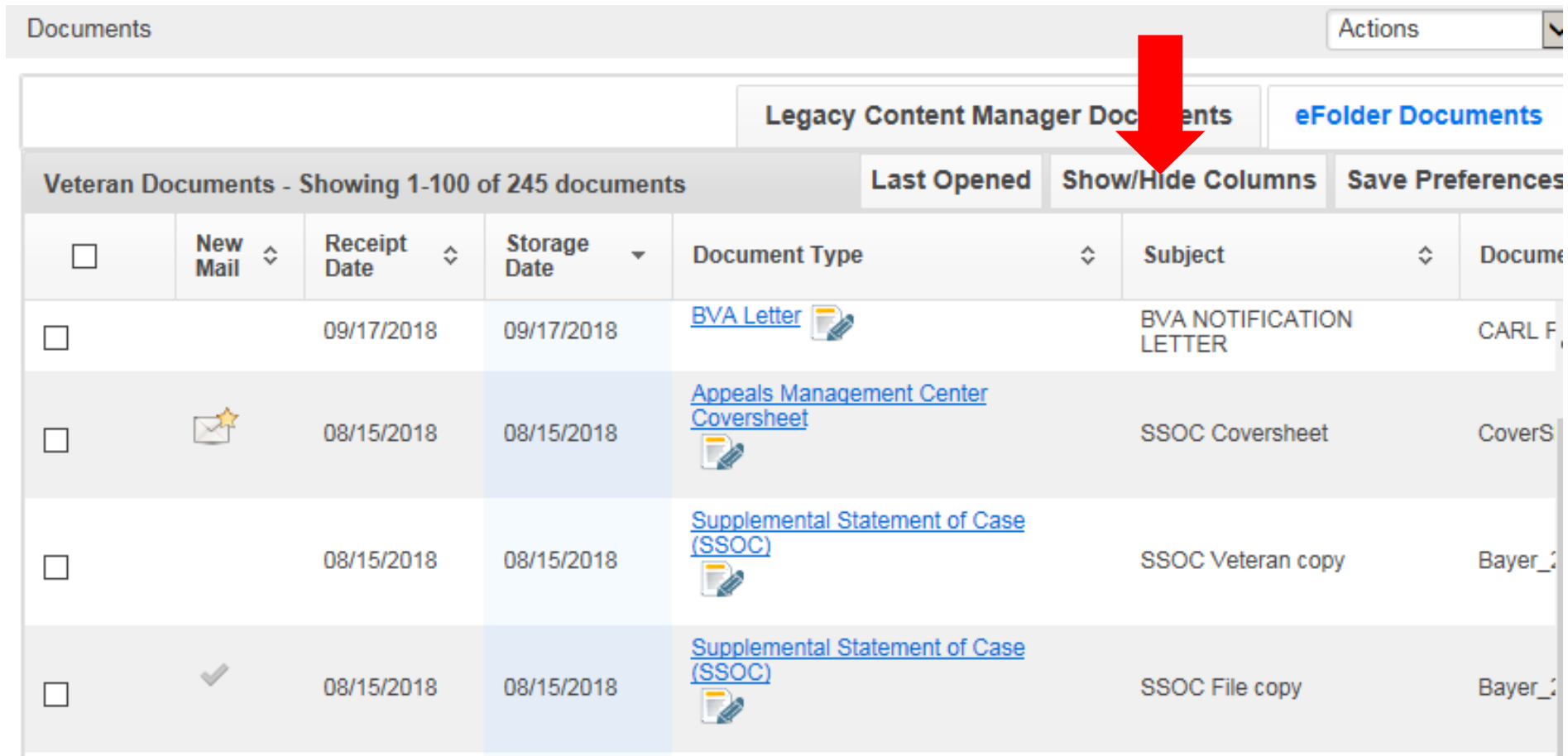
TIP: Setting Documents Displayed

- Set to view 100 documents per page at the bottom of the page.
- Loading pages is time consuming, so the fewer pages the better.



Choosing Columns

- The columns can be customized using "Show/Hide Columns."

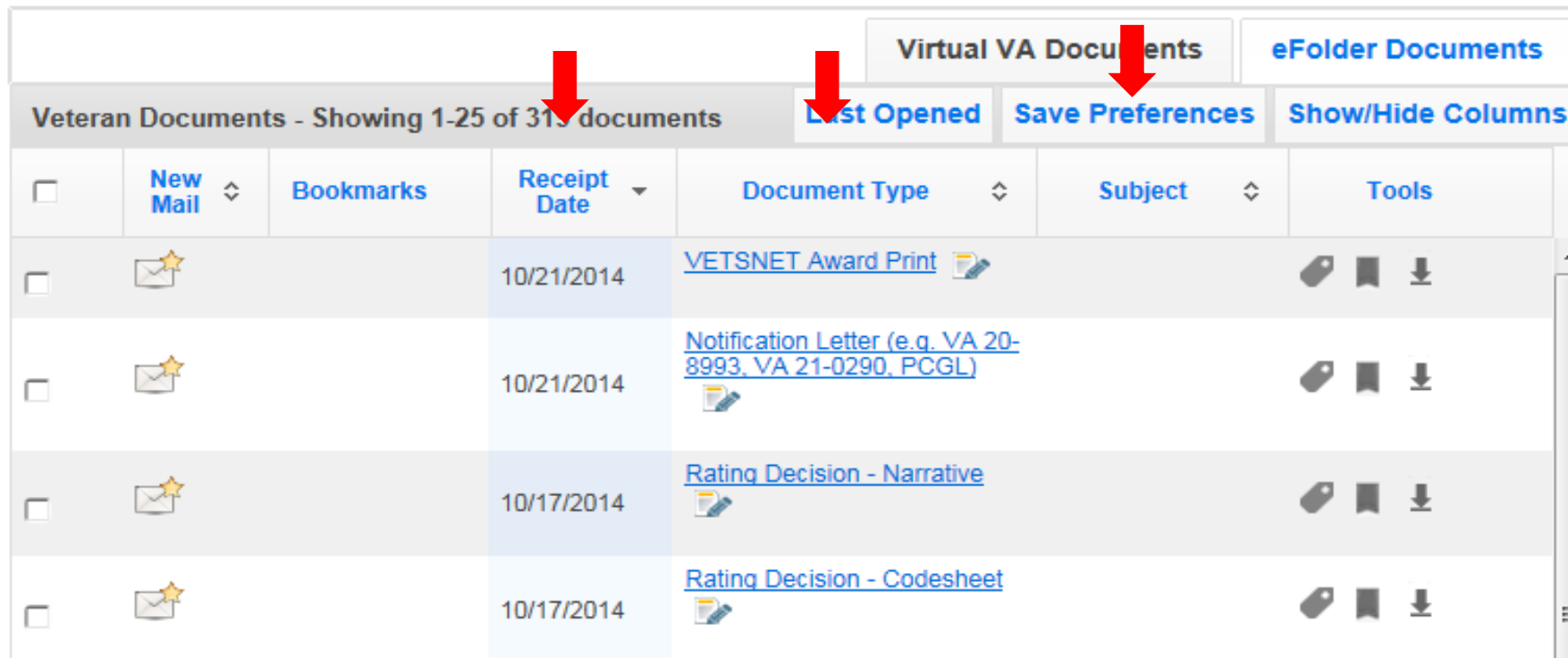


The screenshot shows a web interface for document management. At the top, there is a header bar with the title "Documents" and an "Actions" dropdown menu. Below this, there are two tabs: "Legacy Content Manager Documents" and "eFolder Documents". A red arrow points to the "Show/Hide Columns" button located between the "Last Opened" and "Save Preferences" buttons. Below the navigation bar, there is a table of documents. The table has several columns: a checkbox, "New Mail" (with a dropdown arrow), "Receipt Date" (with a dropdown arrow), "Storage Date" (with a dropdown arrow), "Document Type" (with a dropdown arrow), "Subject" (with a dropdown arrow), and "Document". The table contains four rows of document entries. The first row is "BVA Letter" with a receipt date of 09/17/2018 and storage date of 09/17/2018. The second row is "Appeals Management Center Coversheet" with a receipt date of 08/15/2018 and storage date of 08/15/2018. The third row is "Supplemental Statement of Case (SSOC)" with a receipt date of 08/15/2018 and storage date of 08/15/2018. The fourth row is "Supplemental Statement of Case (SSOC)" with a receipt date of 08/15/2018 and storage date of 08/15/2018. The table is titled "Veteran Documents - Showing 1-100 of 245 documents".

<input type="checkbox"/>	New Mail ▾	Receipt Date ▾	Storage Date ▾	Document Type ▾	Subject ▾	Document
<input type="checkbox"/>		09/17/2018	09/17/2018	BVA Letter	BVA NOTIFICATION LETTER	CARL F
<input type="checkbox"/>		08/15/2018	08/15/2018	Appeals Management Center Coversheet	SSOC Coversheet	CoverS
<input type="checkbox"/>		08/15/2018	08/15/2018	Supplemental Statement of Case (SSOC)	SSOC Veteran copy	Bayer_2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/15/2018	08/15/2018	Supplemental Statement of Case (SSOC)	SSOC File copy	Bayer_2

Sorting Columns

- Each column in the eFolder is **sortable**.
- You can perform an **ascending** or **descending** sort of the documents by selecting any column header **hyperlink** or **arrow**.



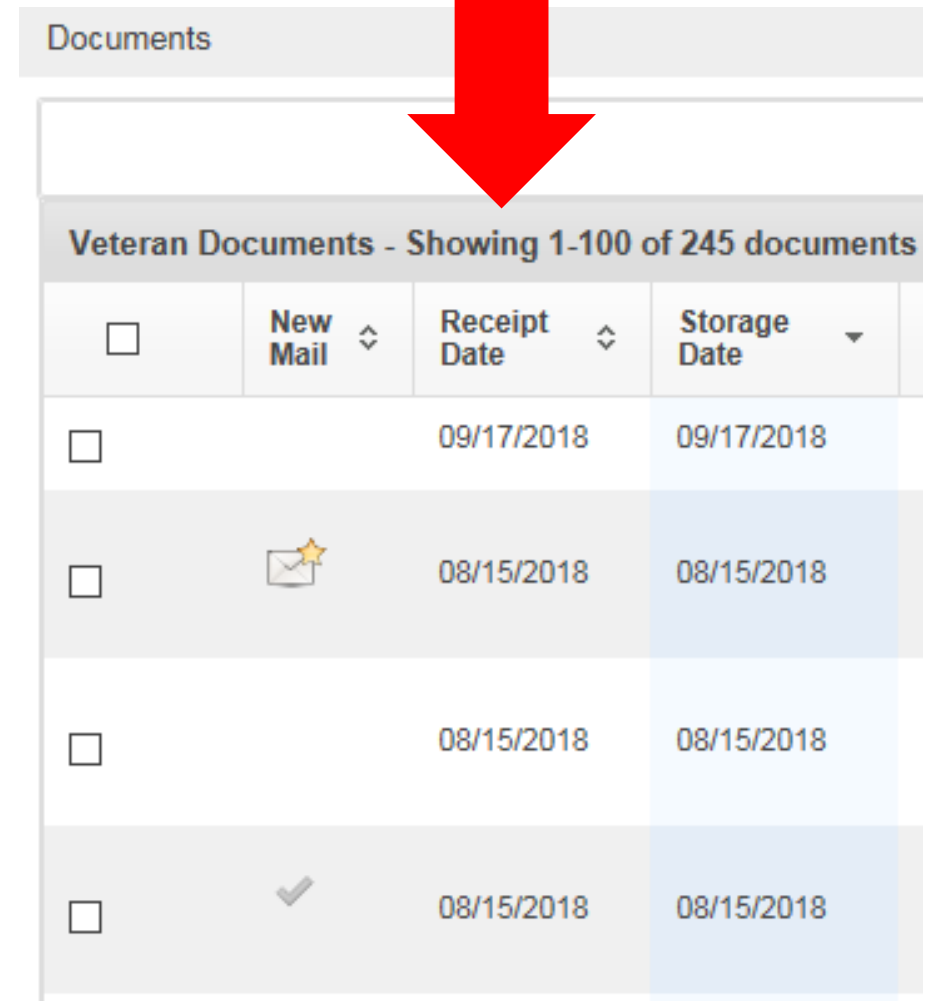
Virtual VA Documents | eFolder Documents

Veteran Documents - Showing 1-25 of 315 documents | [Last Opened](#) | [Save Preferences](#) | [Show/Hide Columns](#)

<input type="checkbox"/>	New Mail ▾	Bookmarks	Receipt Date ▾	Document Type ▾	Subject ▾	Tools
<input type="checkbox"/>			10/21/2014		VETSNET Award Print	
<input type="checkbox"/>			10/21/2014		Notification Letter (e.g. VA 20-8993, VA 21-0290, PCGL)	
<input type="checkbox"/>			10/17/2014		Rating Decision - Narrative	
<input type="checkbox"/>			10/17/2014		Rating Decision - Codesheet	

TIP: Receipt Date

- **Receipt Date** is when VA *thinks* a document was received by **Veterans Benefits Administration (VBA)**.
 - These dates are often wrong because the rules contractors used to assign dates.
 - Remember: The date **VBA** *receives* a document is often different than when **Veterans Health Administration (VHA)** created it.

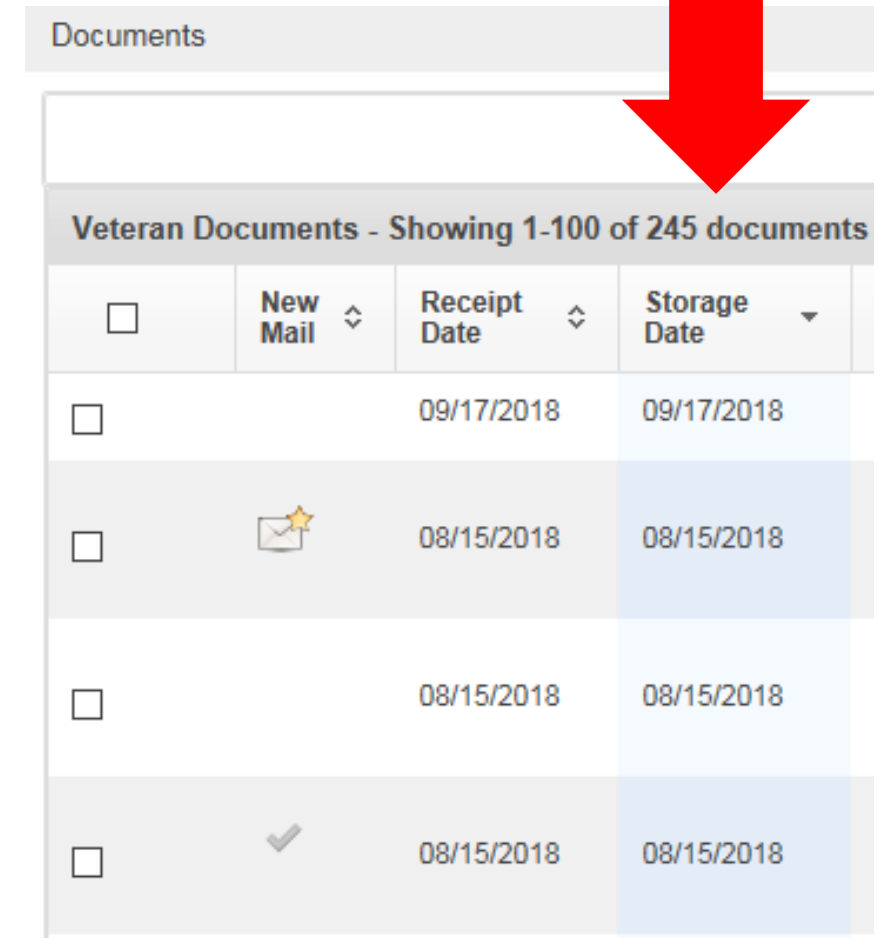


Documents			
Veteran Documents - Showing 1-100 of 245 documents			
<input type="checkbox"/>	New Mail	Receipt Date	Storage Date
<input type="checkbox"/>		09/17/2018	09/17/2018
<input type="checkbox"/>		08/15/2018	08/15/2018
<input type="checkbox"/>		08/15/2018	08/15/2018
<input type="checkbox"/>		08/15/2018	08/15/2018

TIP: Storage Date

- **Storage Date** is when a document was uploaded into VBMS.
 - For documents loaded directly, this should be the same as the receipt date.
 - For documents that were in the legacy file, this will be the date the file was scanned.
 - This date goes to the hundredth of a second, even though only the date is displayed.
 - Sorting by Storage Date can recreate the order of the legacy file.

Advocacy Tip: Try sorting by *Storage Date* when you can't tell what evidence was attached to a cover letter.



Documents			
Veteran Documents - Showing 1-100 of 245 documents			
<input type="checkbox"/>	New Mail	Receipt Date	Storage Date
<input type="checkbox"/>		09/17/2018	09/17/2018
<input type="checkbox"/>		08/15/2018	08/15/2018
<input type="checkbox"/>		08/15/2018	08/15/2018
<input type="checkbox"/>		08/15/2018	08/15/2018

TIP: Subject column



- **Subject** is a field that VBA adjudicators edit to describe documents.
- These descriptions are not binding or 100% reliable, but they can be useful.
- If the subject field is wrong, then it is likely that the document was, or will be, overlooked by VBA rating specialists.

Showing 1-100 of 245 documents		Last Opened	Show/Hide Columns	Save Pref
Receipt Date	Storage Date	Document Type	Subject	
08/15/2018	08/15/2018	Coversheet	SSOC Coversheet	
08/15/2018	08/15/2018	Supplemental Statement of Case (SSOC)	SSOC Veteran copy	
08/15/2018	08/15/2018	Supplemental Statement of Case (SSOC)	SSOC File copy	
08/13/2018	08/13/2018	Miscellaneous C&P Correspondence	Compensation Service ES Decision August 2018	
08/06/2018	08/06/2018	Correspondence	Second Signature	
08/02/2018	08/02/2018	VA Memo	Proposed Extra-scheduler	
06/28/2018	06/28/2018	Appeal Notification Letter		
06/28/2018	06/28/2018	Award Print		
06/20/2018	06/20/2018	Rating Decision - Narrative	Rating Decision - Narrative	
06/20/2018	06/20/2018	Rating Decision - Codesheet	Rating Decision - Codesheet	
06/20/2018	06/20/2018	Deferred Rating (e.g. VA Form 21-6789)	DEFER	
08/28/2017	08/29/2017	C&P Exam	DBQ Medical Opinion	
08/28/2017	08/28/2017	C&P Exam	DBQ OPHTH Eye	
08/28/2017	08/28/2017	C&P Exam	DBQ OPHTH Eye	
08/21/2017	08/22/2017	C&P Exam	DBQ NEURO Headaches (including migraine headaches)	

TIP: Filtering Documents

- Filtering by **Keyword** can help you find important documents quickly.

The screenshot displays a search interface with a left sidebar for filtering and a main area for document results. A large red arrow points from the 'Keyword' filter section to the 'Filter' button at the bottom of the sidebar.

Narrow Results Clear Collapse

▼ Document Views

- All (245)
- Active Evidence (245)
- Veteran Level (122)
- No Evidentiary Value (0)
- Archive Bin (0)
- Hide Duplicates

▼ Line of Business

None

▼ Keyword

21-22

Remaining keywords: 29

► Associated Claims

► Bookmarks

Filter

Documents

Veteran Documents - Showing 1-4 of

<input type="checkbox"/>	New Mail <input type="checkbox"/>	Receipt Date <input type="checkbox"/>
<input type="checkbox"/>		03/17/1995
<input type="checkbox"/>		04/26/2000
<input type="checkbox"/>		04/25/2000
<input type="checkbox"/>		04/25/2000

Items per page: 100

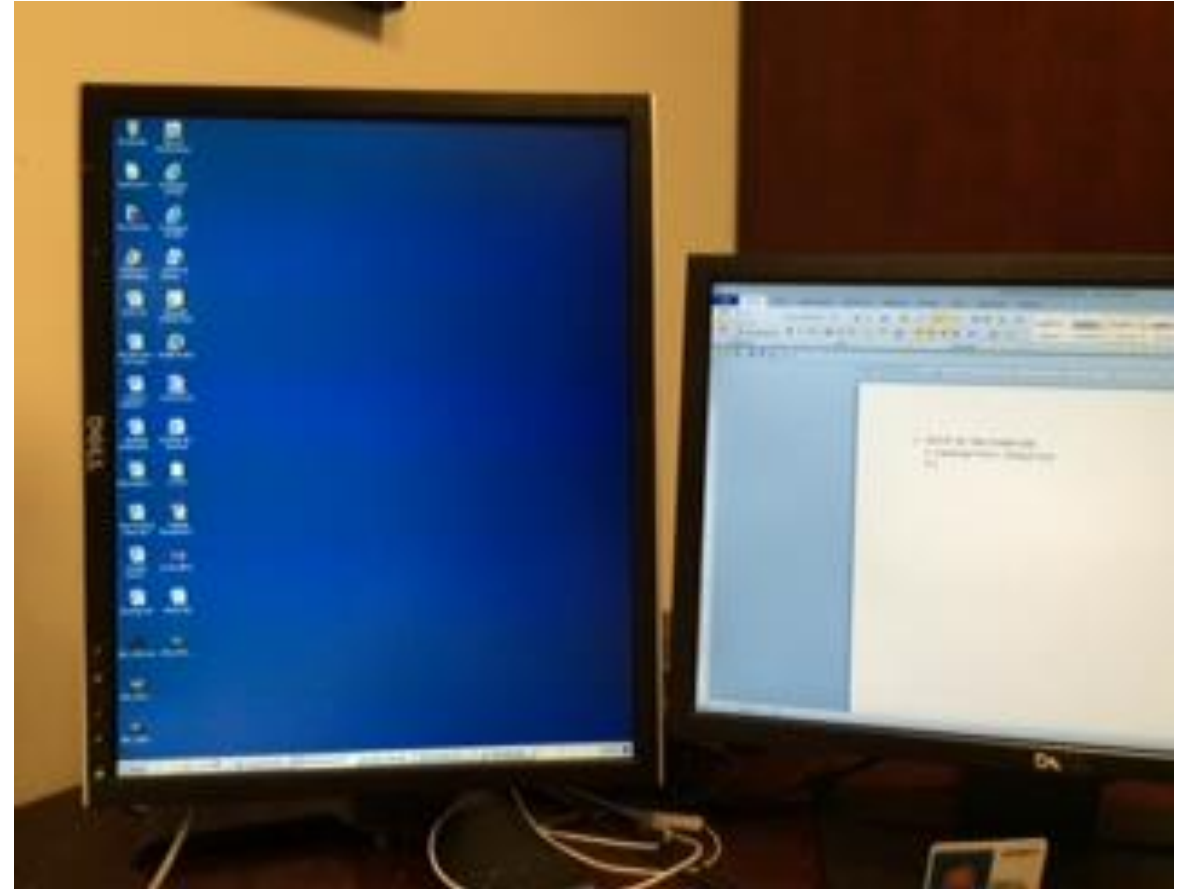
Common Terms to Find Key Documents

Document	Key Term for Filtering in VBMS
DD-214, DD-215, etc.	Discharge
SPRs	Personnel
STRs	STR
PTSD Stressor Statements	PTSD
VA Examination Report	Exam
Private Treatment Records/ SSA Treatment Records	Treatment
VA Treatment Records	Treatment (also check "CAPRI")
Hearing Transcript	Testimony
Buddy and Lay Statements	Lay

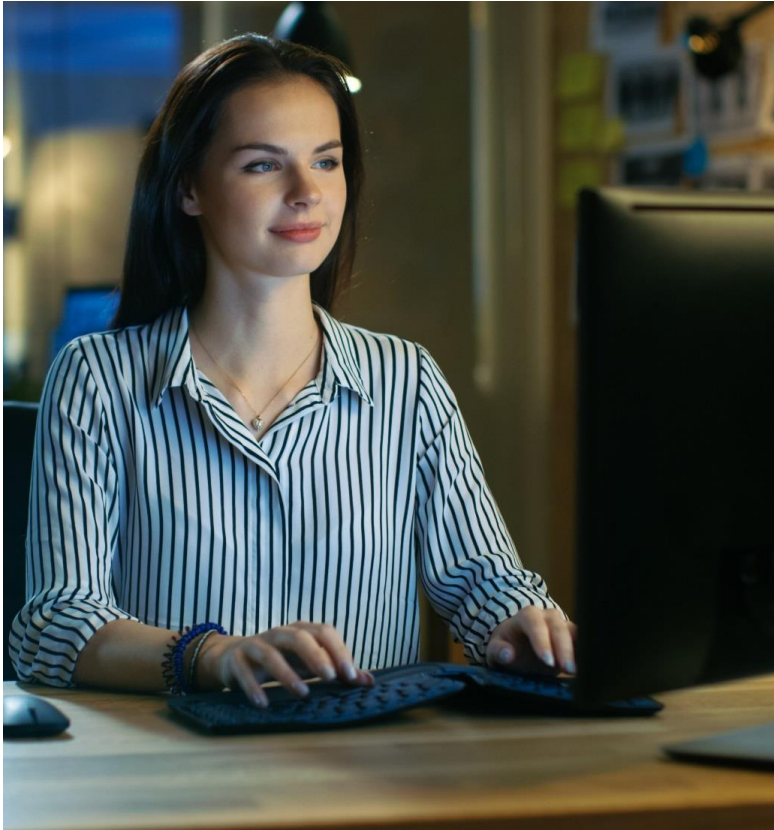
Document	Key Term for Filtering in VBMS
POA	21-22
Original Claim	21-526
TDIU Claim	Unemployability
DIC Claim	Indemnity
Rating Decision	Rating
NOD	Disagreement*
SOC, SSOC	SOC
Form 9	VA 9
Board Decision	BVA
Statement in Support of Claim	21-4138

Displaying Full Pages in VBMS

- Setting a monitor to vertical (portrait) often allows full pages to be viewed at 100% resolution (or greater).
- To make change in Windows:
 - Right click on desktop
 - Select "Graphics Options" or "Display Settings"
 - Select monitor number
 - Change "display orientation" to "portrait."



More VBMS tips



- VBMS usually lists the newest documents first. Also consider sorting by date and reviewing the oldest documents first.
- Consider using keyword searches:
 - Documents from Veterans are sometimes called “Correspondence.”
 - Documents from VSO’s are sometimes called “Third Party Correspondence.”
- A missing document may often be found in the Legacy Content Manager.

Copy and Paste

- VBMS uses Optical Character Recognition (OCR) to “read” a document by its content.
- Users should be able to copy (CTRL+C), paste (CTRL+V, **not** CTRL-P), and search (CTRL+F) within documents.
- This doesn't usually work for handwritten documents.
- Proofread carefully after pasting because OCR can be imperfect and can format text strangely.

Citing to Documents in VBMS

- When you cite to a document in VBMS, identify it by **label** and **receipt date** so that the VA rater can find it easily.
- Include page number if the document is long.



- Make it easy for VA raters to find the evidence that is important, as this increases VA decision speed and accuracy.
- Example: “In August 2018 the Veteran said that he injured his leg during a training exercise.” See Correspondence (receipt date 08/06/2018).”

Caseflow

- Caseflow is another program being used by VA to track AMA claims and review documents.
- Primary tool being used by the Board of Veterans' Appeals (Board).
- There are still few VSO users at this point in time.
- TIP: In Caseflow, to find the document upload date, look under "document information."



Caseflow

VA's "Onboarding" Process

Accessing VA's Systems

- VA has a process for accredited service officers to gain access to VA's information systems to assist Veterans with claims.
- DSOs must work with the Change Management Agent (CMA) at the local VA regional office to ensure that all steps are followed and all necessary paperwork is completed.
 - See "Regional Office POCs" for list of CMA's at:
<https://www.benefits.va.gov/COMPENSATION/cma-poc.asp>
 - Make sure to submit the correct forms, or the process to access VA systems may be delayed!

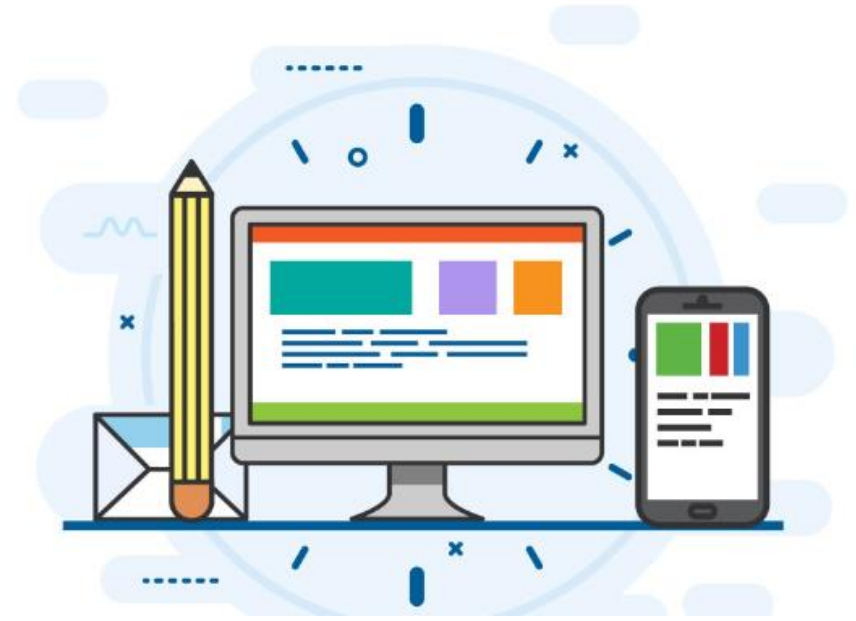
VA Privacy Training

VA Privacy Rules and Training

- Before an individual can access VA information systems, they must first pass a course on “VA Privacy and Information Security Awareness and Rules of Behavior.”
- Users must complete this course *every year*.
- VA requires that the privacy training be completed online through its TMS portal:
<https://www.tms.va.gov/SecureAuth35/>

VA Privacy and Information
Security Awareness and Rules of Behavior

Taking Your Time To Protect VA



Quiz

Click the **Quiz** button to edit this object

Sample Privacy Question:

You're wrapping up after a busy day in the office and a coworker comes to you privately. He wants to know if you can look up his sister's medical record; he thinks there may be a serious illness that his sister is not telling him about. He says he's really concerned and wants to know what he can do to support his sister.

Do you help your coworker access his sister's medical records?

- Certainly. You can tell he really cares about his sister, and he wants to help.
- Absolutely not! You shouldn't access his sister's medical record. Even though you are able to, it's a privacy violation of the patient, who deserves confidentiality. Also, you have no current need to access it for your work.

General Privacy Guidelines

- **No.** You shouldn't access his sister's medical record.
- Assume that all information obtained via any VA information system is **private** and **cannot be shared** without the Veteran's permission.
- Be **overly protective** of access to any VA information system and **never** leave any information unsecured.
- Report **all** information breaches (even suspected breaches) **immediately** to VA.

VA's 2020 privacy information is included as three handouts for this lesson.

TRIP

TRIP for Accreditation

- TRIP stands for “Training, Responsibility, Involvement and Preparation of Claims.”
- Completion of the course is required for accreditation by VA.
- Work with your supervisor and local VA regional office TRIP Coordinator to complete the course.

Return to Dashboard

Details Courses

Details

VSO TRIP Training

My Progress 1/18 5%

Enrolled 07 Dec 2020

Last Entered 07 Dec 2020

Due Date 05 Feb 2021

Courses

In order to complete this path, you must complete all the courses within the path.

1 Lesson 01: The Relationship Between VA and Veterans Service Organizations Passed · Score 100% Relaunch

2 Lesson 02: The Structure of the Department of Veterans Affairs Not Started Launch

3 Lesson 03: Introduction To Reference Materials You will be enrolled automatically having completed the previous courses on the path.

4 Lesson 04: Introduction to Identifying the Claim and the Issues You will be enrolled automatically having completed the previous courses on the path.

5 Lesson 05: Introduction to the Development Process You will be enrolled automatically having completed the previous courses on the path.

6 Lesson 06: Preparing and Submitting Original Claims You will be enrolled automatically having completed the previous courses on the path.

7 Lesson 07: Developing Non-Original Claims You will be enrolled automatically having completed the previous courses on the path.

8 Lesson 08: Fully Developed Claim (FDC) Program You will be enrolled automatically having completed the previous courses on the path.

9 Lesson 09: Burial Benefits and Death Claims You will be enrolled automatically having completed the previous courses on the path.

Course can be taken online outside of VA intranet.

Forty-five days to complete the course once started.

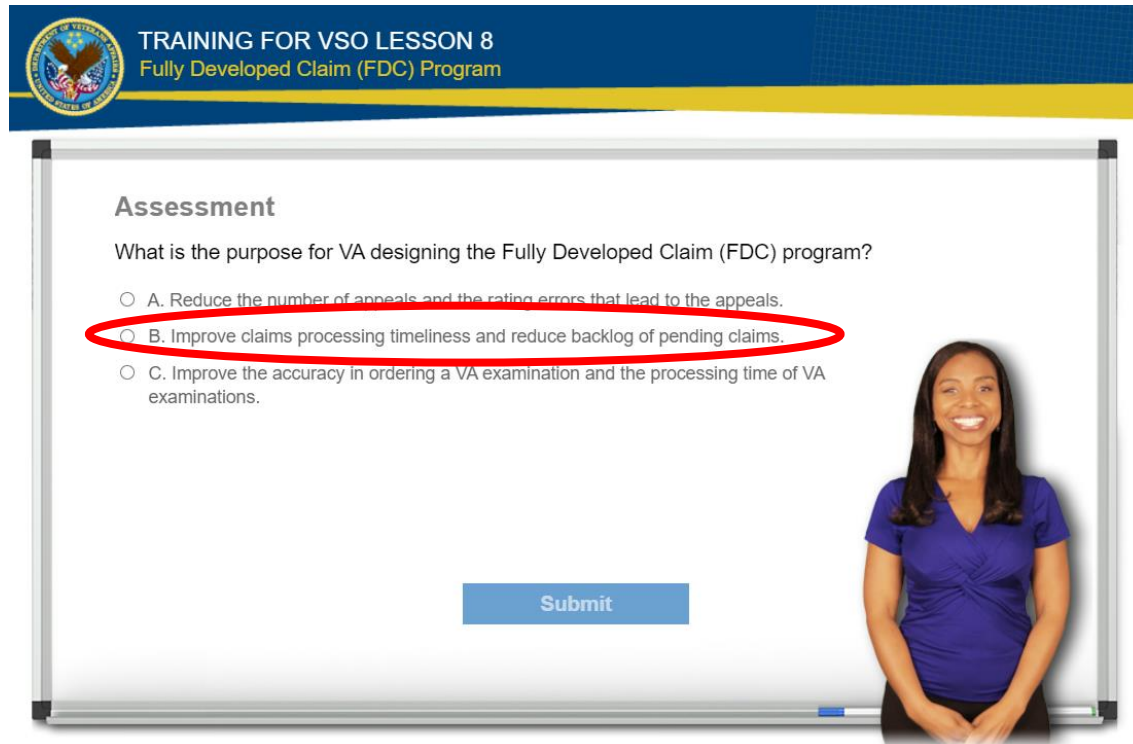
Eighteen modules with a focus on evidence and development.

Completing TRIP

- Every TRIP module must be completed.
- You must complete all modules and pass the final assessment with a score 80 percent or higher.
- You can attempt the final assessment twice before VA locks you out.
 - If you are locked out, contact VA.
- Save and print out the completion certification to prove you passed TRIP training.

TRIP Tips

- Just like this course, set aside time over multiple days to complete the training.
- You can have multiple TRIP browser windows open at once.
- When you take a quiz or the final assessment, open a **second** internet browser window, go to the TRIP website, and review the lesson again while you determine the correct answers.



TRAINING FOR VSO LESSON 8
Fully Developed Claim (FDC) Program

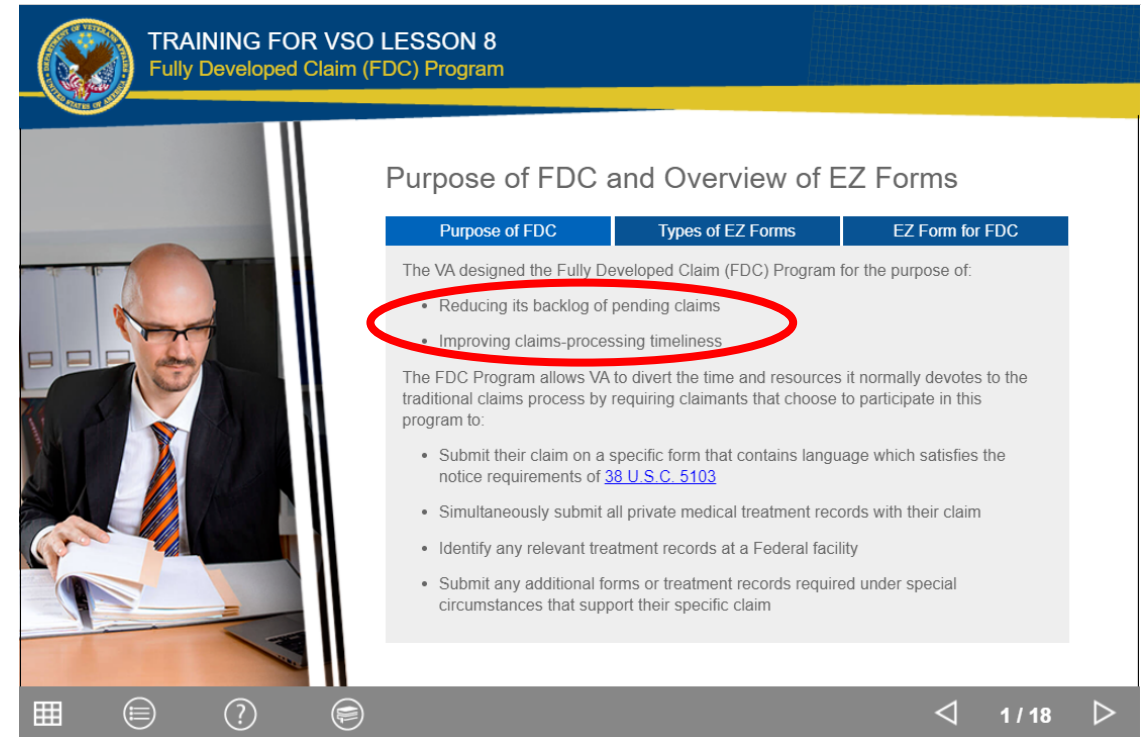
Assessment

What is the purpose for VA designing the Fully Developed Claim (FDC) program?

- A. Reduce the number of appeals and the rating errors that lead to the appeals.
- B. Improve claims processing timeliness and reduce backlog of pending claims.
- C. Improve the accuracy in ordering a VA examination and the processing time of VA examinations.

Submit

A woman in a purple shirt is standing next to the whiteboard.



TRAINING FOR VSO LESSON 8
Fully Developed Claim (FDC) Program

Purpose of FDC and Overview of EZ Forms

Purpose of FDC	Types of EZ Forms	EZ Form for FDC
The VA designed the Fully Developed Claim (FDC) Program for the purpose of:		
<ul style="list-style-type: none">• Reducing its backlog of pending claims• Improving claims-processing timeliness		
The FDC Program allows VA to divert the time and resources it normally devotes to the traditional claims process by requiring claimants that choose to participate in this program to:		
<ul style="list-style-type: none">• Submit their claim on a specific form that contains language which satisfies the notice requirements of 38 U.S.C. 5103• Simultaneously submit all private medical treatment records with their claim• Identify any relevant treatment records at a Federal facility• Submit any additional forms or treatment records required under special circumstances that support their specific claim		

A man in a suit is sitting at a desk looking at papers.

- This presentation is complete.
- A PDF version of these slides will be provided to you at the conclusion of the course for future reference.