



Department and Chapter Service Officer  
Case Management System  
User Reference Manual

# Department and Chapter Service Officer – CMS User Reference Manual

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## Logging into CMS

You can access the DAV CMS 4.0 at the following website. This is the live site, which all claims action **must** be taken through.

<https://cms.dav.org/Account/Login>

**Username:** Your email address

**Password:** Set up by NSO Office

For **training purposes** only, you can also access the CMS UAT environment at the following website:

<https://uatcms.dav.org>

**Username:** Your email address

**Password:** Set up by NSO Office

**\*\*Please note, the boarder is *RED in CMS UAT* and *Blue in CMS 4.0*, as seen in the following two pages.\*\***

## Logging into CMS for First Time

When the local National Service Office has created a user account, a temporary password will be provided.

Upon logging in for the first time, the DSO/CSO must update the account with the following.

- ✓ Set up a **strong password**.
- ✓ Fill in the five security questions.

This is DAV CMS 4.0, which is the live site. All claims actions must be taken using this site.

 NSO Portal | Membership System | Employee Portal

[Account Options](#)

 Use a DAV CMS account to log in.

User Name

Password

[Log In](#)

[Forget your password?](#)  
[Forget your user name?](#)

## For training purposes only, you can also access the CMS UAT environment

 Use a DAV CMS account to log in.

User Name

Password

 Log In

[Forget your password?](#)  
[Forget your user name?](#)

## Finding a Claimant

Upon logging into the system, a navigation bar will be seen on the top left. Upon selecting “Claimant”, then “Find Claimant”, a search for an individual **must always** be made with the below options to prevent creating duplicate claimants.

- ✓ Social Security or Claim Number
- ✓ First and Last Name
- ✓ Email Address
- ✓ Phone Number

The screenshot displays the DAV Case Management System interface. At the top, there is a red navigation bar with the DAV logo and links for Resource Links, NSO Portal, Membership System, and Employee Portal. A user is logged in as 'Welcome, csohope@dav.org'. A dropdown menu for 'Claimant' is open, showing options for 'Find Claimant' and 'Add Claimant'. To the right, there are dropdowns for 'Working on behalf of' (Waco VA Regional Office) and 'Outreach' (Select Outreach). Below the navigation bar, the 'Profile' section is visible. The main content area features a search criteria panel on the left and a search results table on the right. The search criteria panel includes fields for SSN (995-99-7765), Claim Number, Email, and Phone Type. The search results table has columns for First Name, Last Name, Date Of Birth, City, State, Country, and Veteran?. The table is currently empty, and a message indicates '0 results found!'. The page number is 1 of 1, and there are 20 results per page.

Search Criteria	First Name	Last Name	Date Of Birth	City	State	Country	Veteran?
SSN 995-99-7765							
Claim Number							
Email							
Phone Type							

## Adding a Claimant

To add a claimant select “Claimant”, then “Add Claimant”.

- ✓ Please note, before adding any claimant to CMS, a search **must always** be conducted to see if a record already exists.
- ✓ As shared previously, this can be completed by selecting “Find Claimant” then searching by first and last name, their social security and/or claim number, email address, and phone number.

By conducting a search, this avoids duplicate CMS records being created. CMS also provides a warning in most cases if a record matches another that already exists.

The screenshot displays the DAV Case Management System interface. At the top left, the DAV logo is followed by navigation links: Resource Links | NSO Portal | Membership System | Employee Portal. On the right, there are dropdown menus for 'Working on behalf of' (set to Waco VA Regional Office) and 'Outreach' (set to Select Outreach). Below this is a user profile bar with 'Claimant' and 'Welcome, csohope@dav.org'. A dropdown menu is open under 'Claimant', showing 'Find Claimant' and 'Add Claimant', with a blue arrow pointing to 'Add Claimant'. Below the navigation is a 'Profile' section. The main area contains a search criteria panel on the left with fields for SSN (995-99-7765), Claim Number, Email, and Phone Type. To the right is a search results table with columns: First Name, Last Name, Date Of Birth, City, State, Country, and Veteran?. Below the table are pagination controls: 'Clear Filter', radio buttons, 'Page 1 of 1', a dropdown for '20', and a red warning icon with the text '0 results found!'.

## Adding a Claimant - Continued

Upon selecting “Add Claimant”, all information must be completed on the claimant. This includes first and last name, state, country, date of birth, and if available, their claim and social security number.

- ✓ The claim or social security number may be added by clicking on the slide bar seen below, which will access a different screen shown on the following page.
- ✓ All information required to be added are identified with red asterisks (\*). Although some information isn’t required, every effort **must** be made to complete fully.
- ✓ Please note, when filling out, **do not** type in all caps. Example is “JUSTIN” versus “Justin” as a first name.

Create Claimant

Personal Information

Claim Number and SSN:  \* 

First Name \*

Last Name \*

State

Country

Date of Birth

Continue →

## Adding a Claimant - Continued

This screen will appear upon the slide bar being selected.

- ✓ Although a claim or social security number isn't required, every effort **must** be made to include. If not available, do not select the slide bar.

### Create Claimant

#### Personal Information

Claim Number and SSN:



Claim Number

SSN

Continue →

## Adding a Claimant, Potential Existing Record Match

As shared earlier, CMS provides a warning in most cases if a record matches another that already exists. If this occurs, CMS provides a list of potential record matches as seen below.

- ✓ A review ***must*** be conducted of any potential matches listed that may be the claimant. Full claimant details may be viewed by selecting “View Full Details”.
- ✓ If confirmed the record is in fact the claimant being added, select “Use this Record” in the individual claimant record of potential matches.
- ✓ If no warning message is shown of a potential record match, continue adding all information.

The screenshot displays the DAV Case Management System interface. At the top, there is a navigation bar with the DAV logo and links for Resource Links, NSO Portal, Membership System, and Employee Portal. A user login bar shows 'Welcome, csohope@dav.org'. The main content area is titled 'Create Claimant' and includes a 'Personal Information' section with fields for Claim Number (123456789) and SSN. A warning message states: 'We found potential Matches! How would you like to proceed?' with two options: 'Continue without using any Matches' and 'Select a match from the list below...'. Below this is a 'Potential Matches...' section with a table of matches. The table has columns for Status and Claimant. The match listed is Mr. Paul Blart Mallop, born 6/17/1979. Below the table are two buttons: 'View Full Details' and 'Use this record', with a blue arrow pointing to the 'Use this record' button.

DAV CASE MANAGEMENT SYSTEM

Resource Links | NSO Portal | Membership System | Employee Portal

Working on behalf of  
Waco VA Regional Office

Outreach | Select Outreach

Claimant | Welcome, csohope@dav.org

Search

Create Claimant

Personal Information

Claim Number and SSN:

Claim Number: 123456789

SSN:

Cancel

We found potential Matches!  
How would you like to proceed?

Continue without using any Matches

Select a match from the list below...

Potential Matches...

Status	Claimant
	Mr. Paul Blart Mallop
Date of Birth	6/17/1979
City	n/a
State	n/a
Country	n/a

View Full Details

Use this record

## Recording a Phone Call or Interview

First, conduct a search of a claimant record by selecting “Find Claimant” then searching by first and last name, their social security and/or claim number, email address, or phone number. Upon conducting a search, a list of claimant records may be shown.

- ✓ Confirm the correct record of claimants shown by initially reviewing the first and last name, date of birth, state, country, and gender.
- ✓ Upon confirming, select “View” to access the intended claimants electronic record.

Please note, any communication with a claimant ***must always*** be recorded.

The screenshot displays the DAV Case Management System interface. At the top, there is a red navigation bar with the DAV logo and links for Resource Links, NSO Portal, Membership System, and Employee Portal. A user profile dropdown shows 'Welcome, csohope@dav.org'. On the right, there are dropdown menus for 'Waco VA Regional Office' and 'Outreach'. A sidebar on the left contains a search icon and a list of menu items: Activities, Appeals, Dependents, Human Interest, POA, Rating Decision, Submittals, View All, General Request, POA Only (21-22), ITF (21-0966), Claims, Evidence Only, and Case History. The main content area shows a search results table for 'Profile » Paul Mallcop; 123456789; SS123456789; Email'. The search criteria on the left include SSN (123-45-6789), Claim Number, Email, Phone Type, Foreign Phone, Prefix, and First Name. The search results table has columns for First Name, Last Name, Date Of Birth, City, State, Country, and Veteran?. The first row shows 'Paul Mallcop' with a date of birth of '6/17/1979'. A 'View | Details' link is present for this record. Below the table is a 'Clear Filter' button and pagination information: 'Page 1 of 1' and 'View 1 - 1 of 1'. Blue arrows point to the search icon, the search criteria section, the search results table, and the 'View | Details' link.

1

1

## Recording a Phone Call or Interview - Continued

Upon selecting “View”, the claimant record will be shown along with all information available.

- ✓ To record a phone call or interview, select “Communications”, then “View All”, then “Add New”.
- ✓ Upon selecting “Add New”, another page will be shown.

The screenshot displays the DAV Case Management System interface. The top navigation bar includes the DAV logo, resource links, and user information. The left sidebar contains a menu with categories like Activities, Communications, Notes, and Appeals. The main content area shows a breadcrumb trail: Communications » Paul Mallcop; 123456789; SS123456789; followed by a table with columns for DOB, Address, Phone, and Special Cases. Below the table is a filter section with fields for Topic, Contact Type, Interview Type, and Date. A blue arrow points to the 'View All' link in the Communications menu, another blue arrow points to the 'Add New' button, and a third blue arrow points to the 'Add New' button.

Working on behalf of  
Waco VA Regional Office

Outreach Select Outreach

Claimant Welcome, csohope@dav.org

Quick Actions: File Note Communication

Communications » Paul Mallcop; 123456789; SS123456789;

DOB	Address	Phone	Special Cases
6/17/1979	n/a	n/a	n/a

Reference ID  
1597888

Topic Contact Type Interview Type Date

Clear Filter Page 1 of 1 20 0 results found!

1

2

## Recording a Phone Call or Interview - Continued

Upon selecting “Add New”, the below page will be shown. Several type of communications will be shown to select from for recording an activity. Any communication with a claimant **must always** be recorded.

- ✓ Selectable Communication Type(s) include: Interview-In Person; Interview-Phone; Interview-other Video; Phone Call Requested; Email; Fax; and Other.
- ✓ Select the correct option applicable for the communication being recorded.
- ✓ If wanting an NSO to call the claimant within 48 hours, select “Phone Call Requested”.

The screenshot displays a web application interface for recording a communication. The top navigation bar includes a user profile and a welcome message. The sidebar on the left lists various activities and communication types. The main content area shows a form for recording a communication, with a table of communication details above it. The table has columns for DOB, Address, Phone, and Special Cases. The form includes a 'Communication Type' section with radio buttons for 'Interview - In Person', 'Interview - Phone', 'Interview - Over Video', 'Phone Call Requested', 'Email', 'Fax', and 'Other'. There are also fields for 'Topic', 'Summary', and 'Credit To'. Two blue arrows point to the 'Communication Type' section and the 'Phone Call Requested' option.

DOB	Address	Phone	Special Cases
6/17/1989	n/a	n/a	n/a

Reference ID: 15978

Communication Type \*

Interview - In Person

Interview - Phone

Interview - Over Video

Phone Call Requested

Email

Fax

Other

Topic \*

Summary \*

Cancel Save

1

3

## Recording a Phone Call or Interview - Continued

Upon selecting a Communication Type, the local NSO Supervisor ***must*** be selected from the “Credit To” drop down, and the following must be completed. Examples are shown below, and when preparing ***do not*** type in all caps.

- ✓ Fill in the “Topic” by providing a short summary of the action completed.
- ✓ At the end of the “Topic”, your position and first/last name must be added.
  - *Example: Discussed a potential claim for Migraines, submitted POA and ITF. DSO Jon Snow*
- ✓ Fill in the “Summary” for greater detail of items discussed with the claimant.
  - *Example: Type of evidence the claimant will be gathering and submitting later, issues filed for, etc.*
- ✓ If records were reviewed, check “File Reviewed”. Records may include service or medical records, etc.

Cancel ↻

Save ✓

Communication Type \*

- Interview - In Person
- Interview - Phone
- Interview - Over Video
- Phone Call Requested
- Email
- Fax
- Other

Credit To Jon Retzer x ▾

Files Reviewed

Interview Type VA ▾

Topic \*

Discussed Vietnam Service and Diabetes Type II

Summary \*

Spoke with Veteran about his on ground service in Vietnam and his recent diagnosis of Type II diabetes. He has a Disability Questionnaire with him and no other conditions to claim. We will be presented a 526EZ, POA, and DBQ to NSO Office for submission, possibly as a DRC. Veteran was appreciative and sign up as a Full Life Member.

Cancel ↻

Save ✓

1

4

## Preparing Scanned Documents for Electronic Submission

Create and save a file on your personal desktop, and label it as “Submittals”. In preparation of preparing documents for upload and submission in CMS, all information must be temporarily saved here.

- ✓ Documents may include VA Forms, such as the Power of Attorney, Intent to File for a Claim, Supplemental Claim, supporting evidence and documentation, etc.
  - Please note, all VA Forms **must** be downloaded directly from the Veterans Affairs website via <https://www.va.gov/find-forms/>.
- ✓ Upon all evidence and information being uploaded and submitted via CMS, all items **must** be deleted from the file, pursuant to policy.



## Selecting a Submittal Type

Begin by selecting the “Submittals” tab on the left hand side. Several options will be shown. Upon selecting an option, another screen will be shown. *Please note, **do not use the “POA Only” option as an Intent to File must always be submitted with a POA.***

- ✓ Select “ITF (21-0966)” when submitting a POA and Intent to File.
- ✓ Select “Claims” for submitting any new claim for benefits.
- ✓ Select “General Request” when submitting a supplemental claim or higher-level review.
- ✓ Select “Evidence Only” for submitting any type of supporting evidence or documentation for all pending.

Claimant Profile » Paul Mallcop; 123456789; SS123456789;  
Email

The Communication has been saved successfully.

Contact Info Military Service Disabilities Conflict/War Record Treatment Record Special Case

Cancel ↻

Is Veteran?

SSN 123-45-6789

Verify SSN 123-45-6789

Claim Number SS 123456789

VETERAN

Prefix \* Mr.

First Name \* Paul

Middle Name Blart

## Preparing Intent to File Submittal

Begin by selecting the “Submittals” tab on the left hand side, then select ITF (21-0966). Upon selecting, the below screen will be shown and after completing the following steps, select “Review Submission” at the end.

- ✓ Please note, a Power of Attorney form and Intent to File **must** have already been completed, signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer. If the claimant has a DD Form 214, include this with one of the scanned documents as well.
- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.

The screenshot displays the VA Submittals interface. The left sidebar shows the navigation menu with 'Submittals' selected. The main content area shows the 'Submission Contact Info' for 'CSO Hope; 123456789; SS123456789; Email'. The form is titled 'Intent To File' and has a status of 'In Progress'. Key fields and their values are:

- Type: Intent To File
- Status: In Progress
- ITF Effective Date: [Blank]
- Days Left: No ITF on file
- Method: Print
- Include POA?:
- Source: CSO
- Source Name: CSO Hope
- Credit To: [Blank]
- Send to VA Section: Department of Veterans Affairs (VA)

The 'VA Forms: 21-0966' section lists various forms with checkboxes. The '21-0966 Intent to File' form is checked. Other forms listed include 21-22 Power of Attorney, 21-526EZ Compensation Claim, 21-686C Declaration of Status of Dependents\*, 21-74 Request for Approval of School Attendance\*, 21-8940 Veteran's Increased Compensation Based on Unemployability\*, 21-4192 Request for Employment Information in Connection with Claim for Disability\*, 21-0781 Statement in Support of Claim for Service Connection for PTSD\*, 21-0781a Statement in Support of Claim for Service Connection for PTSD Secondary to Personal Assault\*, 26-4555 Veterans Application in Acquiring Specially Adapted Housing or Special Home Adaptation Grant Under Title 38 U.S.C. 2101(a) or (b)\*, 21-4502 Automobile or Other Conveyance and Adaptive Equipment Under 38 U.S.C. 3901-3904\*, 21-2680 Exam for Housebound Status or Permanent Need for Regular A&A\*, 21-0779 Req. for Nursing Home Info. in Connect. with Claim for A&A\*, 21-527EZ Pension Claim\*, 10-8678 Annual Clothing Allowance\*, 21-4140 Employment Questionnaire\*, 21-4142 Authorization to Disclose Information to the VA\*, 28-1900 Disabled Veterans Vocational Rehabilitation\*, 22-0848 Rural Relocation Benefit\*, 22-5490 Survivors and Dependents Educational Assistance\*, 10-10 Domiciliary Applications\*, 10-10EZ Enrollment Application For Health Benefits\*, 10-10D Application for CHAMPVA Benefits\*, 10-2570D Dental Record Authorization and Invoice for Outpatient Service\*, 10-1394 Adaptive Equip - Motor Vehicle\*, 10-0103 Assistance In Acquiring Home Improvement and Structural Alterations\*, 29-4364 Service-Disabled Veterans Insurance\*, 26-1880 Request for A Certificate of Eligibility\*, 26-0286 Loan Summary Sheet\*, and Earlier Effective Date\*.

## Preparing Intent to File Submittal - Continued

Select “Form Upload” on the top, then “Remove” to delete the auto drafted POA and Intent to File forms. Both auto drafted documents **must** be removed.

- ✓ Select the “Attach Claim” for each, then upload the Power of Attorney and Intent to File forms previously completed, already signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ After uploading each of the documents, confirm they have been added.
- ✓ Select “Review Submission”.

VA Forms: 21-22, 21-0966

Contact Info Homeless Veteran Info Evidence POA ITF **Form Upload** Correspondence Signatures

Cancel Save Continue

For each form below, to upload a PDF, click the "Attach Claim" button. Highlighted forms indicate that the form can be generated electronically. However you can choose to replace these by manually uploading a PDF instead.

21-22 - Power of Attorney

Attach Claim

21-0966 - Intent to File Download Preview

21-0966.20250519132501993.pdf Remove

This file was automatically generated on 5/19/2025 at 1:25:02 PM using information provided on this submission. To replace it, click "Remove", then attach a claim PDF. To re-generate a new version, click "Remove", then Save without attaching a new PDF.

Cancel Save Continue

Delete Submittal Review Submission

## Preparing Intent to File Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown. Confirm the POA and ITF documents upload was successful on the screen.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ Upon selecting, all information will be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

VA Forms: 21-22, 21-0966

Contact Info Veteran Info POA ITF Form Upload Correspondence Signatures Submit

### Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 496975
- **Status:** In Progress
- **Claimant:** Mr. Paul Blart Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Attachment(s):**
- **Form(s):**
  - 21-22 Power of Attorney
  - 21-0966 Intent to File
- **# Claims Filed:** 0
- **Submittal Letter:** Included

The diagram consists of three blue arrows. One arrow points vertically down from the top center to the 'Send For Review - All Paper Uploaded' button. Two other arrows point horizontally from the left and right towards the same button. Below this button is another button labeled 'Send For Review - Paper Mailed/Faxed to Office'.

Cancel Delete Submittal Save

## Preparing Claims Submittal

Begin by selecting the “Submittals” tab on the left hand side, then “Claims”. Upon selecting, the below screen will be shown and after completing the following steps, select “Review Submission” at the end.

- ✓ Please note, a Power of Attorney along with all other forms and evidence must have already been completed, signed by the claimant, and scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.
- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to any of the VA Forms listed that’s been prepared, and if the form is not shown, click a check mark next to “Form Not Listed” at the right bottom.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.

The screenshot shows the VA Claims Submittal form. The left sidebar has the "Submittals" tab selected. The main form area is titled "Submission Contact Info" and shows "Paul Mallcop; 989827530; XCSS989827530; supercop911@aol.com;". The "Type" is "Claims" and the "Status" is "In Progress". The "Method" is "Direct Mail Up" and the "Include POA?" checkbox is checked. The "Source" is "No ITF on file" and the "Source Name" is "Must Choose Source...". The "Credit To" is "Justin Hart" and the "Send to VA Section" is "Department of Veterans Affairs (VA)". The "VA Forms" section is expanded to show a list of forms, including "21-22 Power of Attorney" and "21-530 Burial Benefits\*". Blue arrows point to the "Include POA?" checkbox, the "Source" field, the "Credit To" dropdown, the "VA Forms" list, and the "Submittals" tab in the sidebar.

## Preparing Claims Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Select the “Disability & Treatment” tab, then select “Add New Disability” and add each issue being claimed for entitlement.
- ✓ Select either “New” for a new condition, or “Increase” if claiming an increase with a current service connected condition.
- ✓ Within the “Disability” drop down, add each issue being claimed along with the others, if applicable. If the disability is not found within the drop down selection, just type out the claimed condition.
- ✓ Select “Review Submission” after completing.

Contact Info Homeless Veteran Info **Disability & Treatment** Evidence Service Record Service Pay Direct Deposit POA Form Upload Correspondence Signatures

Cancel Save Continue

This is an initial application for compensation or pension benefits  NO

### Disability Entitlements

Add New Disability

New  
 Increase

Disability: \*  
8100 - Migraine

Explain how disability relates to in-service event/exposure/injury:

If due to exposure, event, or injury please specify:

New  
 Increase

Disability: \*  
hair loss

Explain how disability relates to in-service event/exposure/injury:

If due to exposure, event, or injury please specify:

New  
 Increase

Disability: \*  
7828 - Acne

Explain how disability relates to in-service event/exposure/injury:

If due to exposure, event, or injury please specify:

## Preparing Claims Submittal - Continued

Select “Form Upload” on the top, then “Remove” for any auto drafted VA forms to delete. All auto drafted documents **must** be removed.

- ✓ Select the “Attach Claim” for each, then upload all VA forms previously completed, already signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ After uploading each of the documents, confirm they have been added.
- ✓ Select “Review Submission”.

The screenshot shows the 'Form Upload' tab in a web application. The interface includes a navigation bar at the top with tabs: Contact Info, Homeless, Veteran Info, Disability & Treatment, Evidence, Service Record, Service Pay, Direct Deposit, POA, Form Upload, Correspondence, and Signatures. Below the navigation bar, there are 'Cancel' and 'Save' buttons. A text instruction reads: 'For each form below, to upload a PDF, click the "Attach Claim" button. Highlighted forms indicate that the form can be generated electronically. However you can choose to replace these by manually uploading a PDF instead.' The main content area lists three forms: '21-22 - Power of Attorney', '21-526EZ - Standard Claim', and '- Form Not Listed\*'. The first form is highlighted in yellow and has a 'Remove' button. The second and third forms have 'Attach Claim' buttons. Blue arrows point to the 'Form Upload' tab, the 'Remove' button, the 'Attach Claim' buttons, and the 'Review Submission' button at the bottom right. At the bottom left, there is a red 'Delete Submittal' button.

## Preparing Claims Submittal - Continued

If applicable, select the “Evidence” tab on the top and the following screen will be shown. Please note, all supporting evidence and documentation must already be scanned and saved to the “Submittals” folder on the computer.

- ✓ Select “Add Evidence With Attachment” for each and all supporting documentation.
- ✓ Fill in the “What type of evidence is this?” and “With which claim(s) is the evidence associated”. After uploading each of the documents, confirm all have been added from your “Submittals” folder.
- ✓ Select “Review Submission”.

The screenshot shows a web interface for submitting evidence. At the top, there is a navigation bar with tabs: Contact Info, Homeless, Veteran Info, Disability & Treatment, Evidence (highlighted), Service Record, Service Pay, Direct Deposit, POA, Form Upload, Correspondence, and Signatures. Below the navigation bar, there are buttons for "Cancel", "Save", and "Continue". The main content area is titled "Submission Evidence" and contains two buttons: "Add Evidence With Attachment" (highlighted with a blue arrow) and "Add Evidence (No Attachment)". Below these buttons, a document titled "Boarding Pass - Print your boarding pass - American Airlines.pdf" is shown. Underneath the document, there are two sections: "What type of evidence is this?\*" with a text input field containing "Airline Boarding Pass for Baghdad, Iraq" (pointed to by a blue arrow), and "With which claim(s) is this evidence associated?" with three radio button options: "21-22 Power of Attorney", "21-526EZ Standard Claim" (checked, pointed to by a blue arrow), and "Form Not Listed\*". At the bottom of the interface, there are buttons for "Cancel", "Save", "Continue", "Delete Submittal", and "Review Submission" (pointed to by a blue arrow).

## Preparing Claims Submittal - Continued

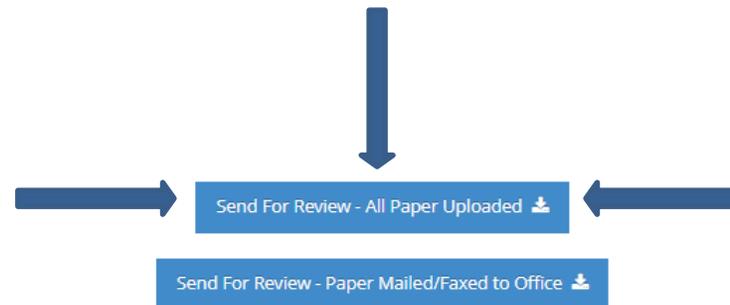
Upon selecting “Review Submission”, the following page will be shown. Confirm all disabilities claimed, attachments, and etc., are shown and listed.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ Upon selecting, all information will be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

### Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646456
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Disabilities Claimed:**
  - N 7828 - Acne
  - N hair loss
  - N 9411 - Mental disorders: Anxiety disorders: Posttraumatic stress disorder
- **Attachment(s):**
  - [Boarding Pass - Print your boarding pass - American Airlines.pdf](#) - Airline Boarding Pass for Baghdad, Iraq
  - [Katherine Summer Camp.pdf](#) - Registration for Summer Camp
- **Form(s):**
  - [21-22 Power of Attorney](#)
  - 21-526EZ Standard Claim
  - Form Not Listed\*
- **# Claims Filed:** 2
- **# Conditions Filed:** 3
  - New Service Connection(s): 3
  - New Increase(s): 0
  - New Secondary Condition(s): 0
- **Submittal Letter:** Included



Cancel ↻

Delete Submittal

Save ✓

## Preparing Supplemental Claim or Higher-Level Review Submittal

Upon selecting “General Request” from the options listed, the following screen will be shown. Please note, a Power of Attorney form, and supplemental or higher level review form must have already been completed, signed, and scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.

- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to either supplemental claim, or higher-level review.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.
- ✓ Select “Review Submission” at the bottom right of the screen.

The screenshot shows the VA Forms submission interface. The top navigation bar includes a search icon, a user profile icon, and quick actions for File, Note, and Communication. The left sidebar contains a menu with categories like Activities, Dependents, General Attachment, Human Interest, POA (checked), Rating Decision, and Submittals. The main content area displays submission details for Paul Mallcop. The 'Type' is set to 'General Request'. The 'Method' is 'Print', and the 'Include POA?' checkbox is checked. The 'Status' is 'In Progress'. The 'Source' is 'CSO', 'Source Name' is 'Test Source', and 'Send to VA Section' is 'Department of Veterans Affairs (VA)'. The 'ITF Effective Date' is 'No ITF on file'. The 'Credit To' field is empty. Below this, the 'VA Forms' section lists various forms with checkboxes, including 21-22 Power of Attorney, 21-0966 Intent to File, 21-526EZ BDD Claim, 21-526EZ FDC Claim, 21-526EZ IDES Claim, 21-526EZ Standard Claim, 21-686C Declaration of Status of Dependents\*, 20-0995 Supplemental Claim\*, 21-530 Burial Benefits\*, 21-0304 Spina Bifida Benefits\*, 21-4140 Employment Questionnaire\*, 21-4142 Authorization to Disclose Information to the VA\*, 28-1900 Disabled Veterans Vocational Rehabilitation\*, 22-0848 Rural Relocation Benefit\*, 22-5490 Survivors and Dependents Educational Assistance\*, and 10-10 Domiciliary Applications\*. Blue arrows point to the 'Include POA?' checkbox, the 'Source' dropdown, the 'Source Name' dropdown, the 'Credit To' dropdown, the '20-0995 Supplemental Claim\*' checkbox, and the 'General Request' option in the sidebar.

## Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Select the “Disability Claimed” tab, then select “Add New Disability” and add each issue being claimed for entitlement.
- ✓ Select either “New” for a new condition, “Increase” if claiming an increase with a current service connected condition, or “Secondary” if claiming a condition caused by a service connected condition.
- ✓ Within the “Disability” drop down, add each issue being claimed along with the others, if applicable. If the disability is not found within the drop down selection, just type out the claimed condition.
- ✓ Select “Review Submission” after completing.

The screenshot displays the 'Disabilities Claimed' tab in a web application. At the top, there are navigation tabs: 'Contact Info', 'Veteran Info', 'Disabilities Claimed', and 'Disability Evidence'. Below the tabs, there are 'Cancel' and 'Save' buttons, and a 'Continue' button with a right-pointing arrow. A toggle switch is set to 'NO' with the text 'This is an initial application for compensation or pension benefits'. The main section is titled 'Disability Entitlements' and contains an 'Add New Disability' button. Below this, there are two identical forms. Each form has three radio buttons: 'New' (selected), 'Increase', and 'Secondary'. To the right of the radio buttons is a 'Disability: \*' dropdown menu. A blue arrow points to the dropdown in the first form, and another blue arrow points to the dropdown in the second form. To the right of the dropdown is a text field labeled 'If due to exposure, event, or injury please specify:'. Below the text field is a 'Remove' button. At the bottom of the form, there are 'Cancel', 'Save', and 'Continue' buttons. A blue arrow points to the 'Continue' button. Below the form, there are two buttons: 'Delete Submittal' (red) and 'Review Submission' (blue) with a right-pointing arrow.

## Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

After selecting “Review Submission”, select the “Evidence” tab, then the following screen will be shown.

- ✓ Select “Add Evidence with Attachment”, then add the scan/saved supplemental claim or higher-level review forms from your “Submittals” folder on your computer.
- ✓ Continue selecting “Add Evidence with Attachment” for all others when applicable, and upload the Power of Attorney along with any other supporting evidence or documentation, which is scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.
- ✓ Select “Review Submission”.

VA Forms: 20-0996

Contact Info Veteran Info Disabilities Claimed Evidence

Cancel

Save

Continue

Submission Evidence

Add Evidence With Attachment

Add Evidence (No Attachment)

VA Form 20-0996.pdf Remove

Download Preview

What type of evidence is this? \*

VA Form 20-0996

With which claim(s) is this evidence associated?

20-0996 Higher-Level Review\*

Cancel

Save

Continue

Delete Submittal

Review Submission

## Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ All information will then be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs.

VA Forms: 21-22, 20-0996

Contact Info Veteran Info Disabilities Claimed Evidence POA Correspondence **Submit**

### Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646465
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Disabilities Claimed:**
  - N 7828 - Acne
  - N 7908 - Acromegaly
- **Attachment(s):**
  - [VA Form 20-0996.pdf](#) - VA Form 20-0996
- **Form(s):**
  - 20-0996 Higher-Level Review\*
  - 21-22 Power of Attorney
- **# Claims Filed:** 1
- **# Conditions Filed:** 2
  - New Service Connection(s): 2
  - New Increase(s): 0
  - New Secondary Condition(s): 0
- **Submittal Letter:** Included

The diagram consists of several blue arrows. A vertical arrow points down from the 'Attachment(s)' section to the 'Send For Review - All Paper Uploaded' button. Three horizontal arrows point left from the right side of the page to the 'VA Form 20-0996.pdf', '21-22 Power of Attorney', and 'New Service Connection(s): 2' items. Two horizontal arrows point right from the left side of the page to the 'VA Form 20-0996.pdf' and 'New Service Connection(s): 2' items.

**Send For Review - All Paper Uploaded**

**Send For Review - Paper Mailed/Faxed to Office**

## Preparing Evidence Only Submittal

Upon selecting “Evidence Only” from the options listed, the following screen will be shown. Please note, a Power of Attorney form, along with all supporting evidence and documentation should be scanned as separate PDF documents to your “Submittals” folder on your computer.

- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to either supplemental claim, or higher-level review.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.
- ✓ Select “Review Submission” at the bottom right of the screen.

The screenshot shows the VA Forms submission interface. The top navigation bar includes a search icon, a user profile icon, and quick actions for File, Note, and Communication. The left sidebar lists various activities, with 'Submittals' selected. The main content area displays submission details for Paul Mallcop. The 'Type' is set to 'Evidence Only'. The 'Method' is 'Print', and the 'Include POA?' checkbox is checked. The 'Status' is 'In Progress'. The 'Source' is 'CSO' and the 'Source Name' is 'Test Source'. The 'Send to VA Section' is 'Department of Veterans Affairs (VA)'. The 'ITF Effective Date' is 'No ITF on file'. The 'Credit To' field is empty. The 'VA Forms' section lists various forms, with '21-22 Power of Attorney' selected. Blue arrows point to the 'Include POA?' checkbox, the 'Source' dropdown, the 'Source Name' dropdown, the 'Credit To' dropdown, and the '21-22 Power of Attorney' checkbox.

Submission Contact Info » Paul Mallcop; 989827530; XCSS989827530; supercop911@aol.com; !

Type: Evidence Only

Method: Print  Include POA?

Status: In Progress

Source: CSO

Source Name: Test Source

Send to VA Section: Department of Veterans Affairs (VA)

ITF Effective Date: No ITF on file

Days Left: No ITF on file

Credit To: [Empty]

Files Reviewed:

VA Forms

- 21-22 Power of Attorney
- 21-0966 Intent to File
- 21-526EZ BDD Claim
- 21-526EZ FDC Claim
- 21-526EZ IDES Claim
- 21-526EZ Standard Claim
- 21-686C Declaration of Status of Dependents\*
- 20-0995 Supplemental Claim\*
- 20-0996 Higher-Level Review\*
- 21-530 Burial Benefits\*
- 21-0304 Spina Bifida Benefits\*
- 21-4140 Employment Questionnaire\*
- 21-4142 Authorization to Disclose Information to the VA\*
- 28-1900 Disabled Veterans Vocational Rehabilitation\*
- 22-0848 Rural Relocation Benefit\*
- 22-5490 Survivors and Dependents Educational Assistance\*
- 10-10 Domiciliary Applications\*
- 10-10EZ Enrollment Application For Health Benefits\*

## Preparing Evidence Only Submittal - Continued

After selecting “Review Submission”, select the “Evidence” tab, then the following screen will be shown.

- ✓ Select “Add Evidence with Attachment”, then add the scan/saved POA form from your “Submittals” folder on your computer.
- ✓ Continue selecting “Add Evidence with Attachment” for all others when applicable, and upload any other supporting evidence or documentation, which is scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ Select “Review Submission”.

The screenshot displays the 'Evidence' tab within the 'VA Forms: 21-22' application. The interface includes a top navigation bar with tabs for 'Contact Info', 'Veteran Info', 'Evidence', and 'Signatures'. Below this, there are two main sections. The first section contains a 'Cancel' button on the left and 'Save' and 'Continue' buttons on the right. The second section, titled 'Submission Evidence', features two primary buttons: 'Add Evidence With Attachment' and 'Add Evidence (No Attachment)'. A blue arrow points from the 'Evidence' tab to the 'Add Evidence With Attachment' button. Below the 'Add Evidence With Attachment' button, another blue arrow points upwards. To the right of the 'Add Evidence (No Attachment)' button, a blue arrow points downwards towards the 'Review Submission' button located at the bottom right of the interface. A red 'Delete Submittal' button is visible at the bottom left. The 'Review Submission' button is highlighted in blue.

## Preparing Evidence Only Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Confirm all attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ All information will then be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

VA Forms: 21-22

Contact Info Veteran Info Evidence POA Correspondence Signatures Submit

### Submission Confirmation Page

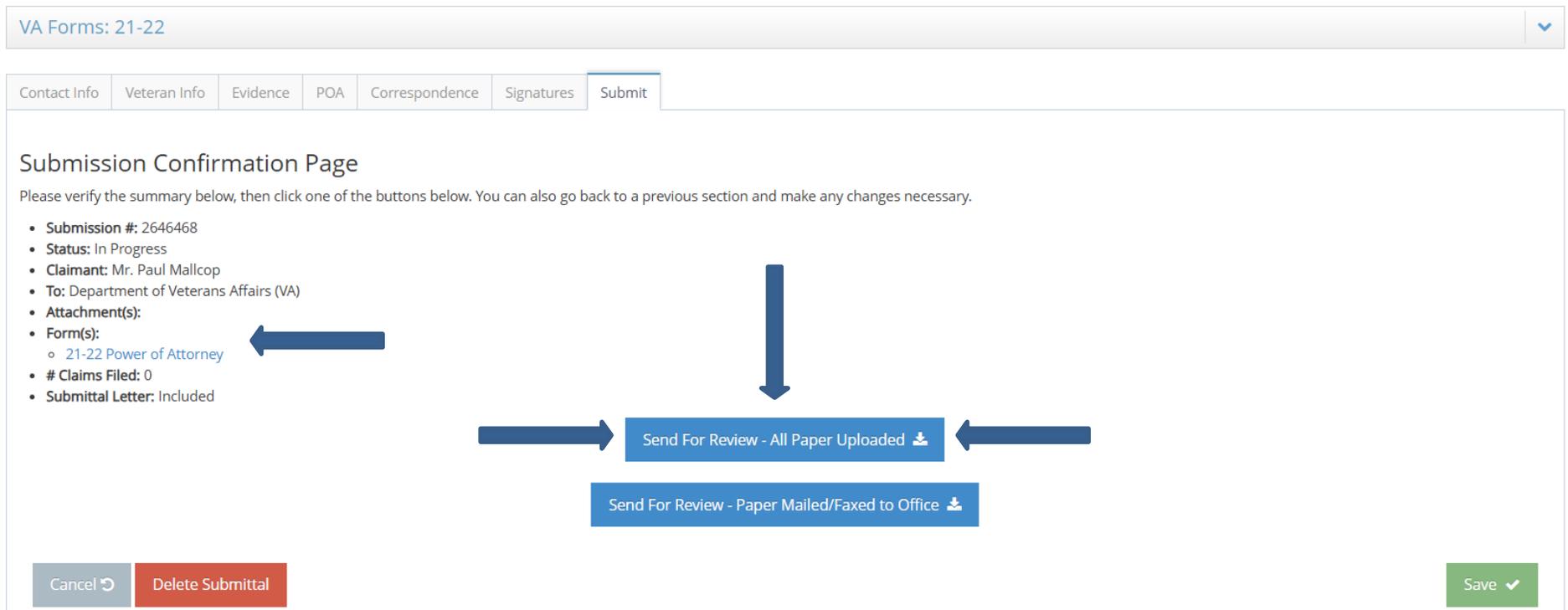
Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646468
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Attachment(s):**
- **Form(s):**
  - 21-22 Power of Attorney
- **# Claims Filed:** 0
- **Submittal Letter:** Included

Send For Review - All Paper Uploaded

Send For Review - Paper Mailed/Faxed to Office

Cancel Delete Submittal Save



## Special Case Notifications

In certain special cases or circumstances, it's important to note and identify within a claimants record to ensure the national service office is made aware of. Some examples of special circumstances may include but are not limited to the following.

- ✓ Homelessness, such as the veteran losing their home due to a fire, and etc.
- ✓ Financial Hardship
- ✓ Terminal conditions, such as lung cancer, multiple sclerosis, and etc.
- ✓ Currently living in another country, email is the best method of communication.

To add a “Special Case”, click on the silhouette on the top left of the screen of a claimants record, then click on “Add Special Case Record”, and the below page will be shown. Select a “Case Type”, then add notes for each and save. **Do not** type in all caps.

The screenshot displays a web interface for a claimant's profile. At the top left, there is a search icon and a silhouette icon. A blue arrow points to the silhouette icon. The main header shows 'Claimant Profile » Paul Mallcop; 123456789; SS123456789; mail'. Below the header is a navigation menu with tabs: Contact Info, Military Service, Disabilities, Conflict/War Record, Treatment Record, and Special Case. A blue arrow points to the 'Special Case' tab. On the left side, there is a sidebar with various menu items: Activities, Appeals, Dependents, Human Interest, POA, Rating Decision, Submittals, View All, General Request, POA Only (21-22), ITF (21-0966), Claims, Evidence Only, and Case History. The 'Special Case' tab is active, showing a modal form. The modal has a 'Cancel' button at the top left and a 'Save' button at the top right. Below the buttons is a blue button labeled 'Add Special Case Record'. A blue arrow points to this button. The modal contains a 'Case Type' dropdown menu with 'Homeless' selected, and a 'Notes' text area with the text 'Veteran recently lost home due to fire. Need to request to expedite.' At the bottom of the modal, there are 'Cancel' and 'Save' buttons. A blue arrow points to the 'Save' button at the bottom right of the modal.

# Important Reminders

- ✓ All **VA Forms must be downloaded** directly from the Veterans Affairs website via <https://www.va.gov/find-forms/>.
- ✓ **Do not** use the auto generated VA forms in CMS, as they are not the most recent.
- ✓ Sometimes while submitting a claim the POA indicator will be a red X. This will need to be a green check or the POA included box checked on your submittal
- ✓ Always **search for existing claimants in CMS**, ensuring not to create a duplicate record. CMS will also help by sharing a warning one exists.
- ✓ **Ensure each disability being claimed is added for claims submittals**. Indicate specifically what is being claimed such as new, secondary or increase.
- ✓ **Do not** upload the DAV contact brief.
- ✓ **Do not** type in all caps. An example is “JON SNOW” versus “Jon Snow”.
- ✓ Ensure interviews and phone calls are **kept** on all client interactions. This will ensure thorough communication between yourself and the local national service office.
- ✓ **Do not** create two or more separate submittals in the same interview.
- ✓ Always ensure clients **contact information**, such as email, mailing address, and phone numbers are up to date with each client interactions.
- ✓ Upon all evidence and information being uploaded and submitted via CMS, all items **must be deleted** from the “Submittals” file on your computer, pursuant to policy.

**Any questions or concerns with CMS, please contact the local National Service Office .**