

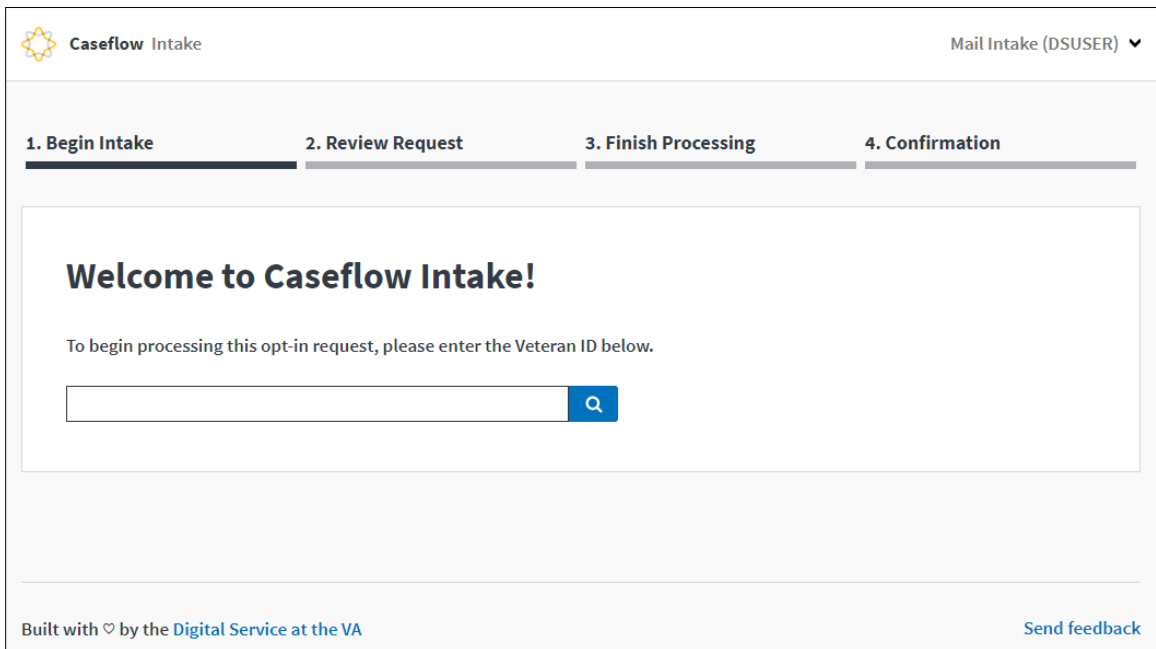
Caseflow Intake – Training Guide

Caseflow Intake (Intake) is a web-based application designed to support the Rapid Appeals Modernization Program (RAMP). Intake will process legacy appeals for Veterans that have chosen to Opt-In for the new Supplemental Claim (SC) or Higher Level Review (HLR) options. Intake was built by the Digital Service at VA (DSVA) and will create process improvements for many areas of the VA.

Accessing and Using Intake

Signing into Intake

1. Connect to the VA network.
2. Using your web browser, navigate to <https://appeals.cf.ds.va.gov/intake>
3. Sign in using your VA credentials.
4. You will be taken to the Intake Welcome page.



The screenshot shows the Caseflow Intake application interface. At the top left is the Caseflow Intake logo. At the top right is a user profile dropdown labeled 'Mail Intake (DSUSER)'. Below the header is a progress bar with four steps: '1. Begin Intake' (active), '2. Review Request', '3. Finish Processing', and '4. Confirmation'. The main content area has a heading 'Welcome to Caseflow Intake!' followed by the instruction 'To begin processing this opt-in request, please enter the Veteran ID below.' Below this is a text input field and a blue search button with a magnifying glass icon. At the bottom left is the text 'Built with ♥ by the Digital Service at the VA' and at the bottom right is a 'Send feedback' link.

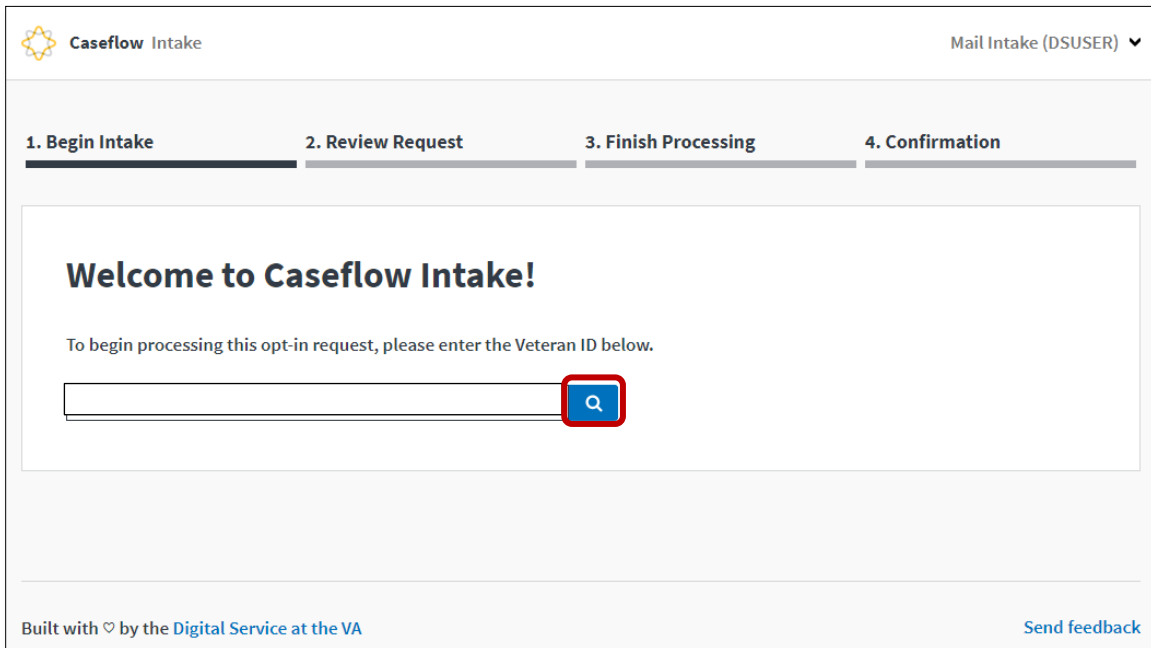
Processing an Opt-in Request

The Veterans Benefits Administration (VBA) will conduct a pilot program, the Rapid Appeals Modernization Program (RAMP), which allows most Veterans who have a pending legacy appeal to opt into VBA's SC or HLR lanes in the new claims and appeals process signed into law on August 23, 2017.

To participate in RAMP, the appellant, or his/her authorized representative, must opt-in in writing. As the opt-in equates to withdrawal of the pending appeal, VBA cannot take the opt-in over the phone. VBA will not accept opt-in elections in any format other than the RAMP Opt-In Election.

Begin Intake

1. Click within the Search bar and input Veteran's ID.
2. Click the search icon to search for the Veteran to begin processing the Veteran's election form.



The screenshot shows the 'Caseflow Intake' web application. At the top left is the 'Caseflow Intake' logo. At the top right is a dropdown menu labeled 'Mail Intake (DSUSER)' with a downward arrow. Below the header is a progress bar with four steps: '1. Begin Intake' (highlighted with a thick line), '2. Review Request', '3. Finish Processing', and '4. Confirmation'. The main content area has a heading 'Welcome to Caseflow Intake!' followed by the instruction 'To begin processing this opt-in request, please enter the Veteran ID below.' Below this is a text input field with a blue search icon button to its right, which is highlighted with a red square. At the bottom left is the text 'Built with ♥ by the Digital Service at the VA' and at the bottom right is a 'Send feedback' link.

Review Request

Review the Veteran's RAMP Opt-in Election form in the Centralized Portal to verify the Veteran's opt-in election.

1. Select the Veteran's Opt-in election.
2. Input the Receipt Date of the Veteran's election form.
3. Click **Continue to next step** button to go to the next step.

The screenshot shows the 'Caseflow Intake' interface for user 'Anthony, John (45555555)'. The top navigation bar includes 'Mail Intake (DSUSER)' and a dropdown arrow. Below the navigation bar is a progress indicator with four steps: '1. Begin Intake', '2. Review Request' (the current step), '3. Finish Processing', and '4. Confirmation'. The main content area is titled 'Review John Anthony's opt-in request' and contains the instruction 'Check the Veteran's RAMP Opt-In Election form in the Centralized Portal.' Below this, a question asks 'Which election did the Veteran select?' with three radio button options: 'Supplemental Claim', 'Higher Level Review with Informal Conference', and 'Higher Level Review'. The 'Supplemental Claim' option is selected and highlighted with a red box. Below the radio buttons, another question asks 'What is the Receipt Date for this election form?' with a text input field containing 'mm/dd/yyyy' and a red 'Receipt Date' label. At the bottom right, there are two buttons: 'Cancel Intake' and 'Continue to next step', with the latter highlighted by a red box.

Opt-in Election Options

- A **Supplemental Claim** (SC) is a request by an appellant to have their appeal(s) reviewed by Veterans Benefits Administration (VBA) based on additional evidence that is new and relevant to the benefit(s) sought.
- A **Higher-Level Review** (HLR) under RAMP will consist of a de novo review of the issue(s) on appeal. The Higher-Level Reviewer will only consider evidence which was available to the VBA at the time the appellant elected to opt-in to RAMP. VBA WILL NOT consider any evidence submitted after the appellant elected the HLR.
- An **Informal Conference** is defined as contact with a claimant and/or his or her representative, telephonically, or as determined by VA, for the sole purpose of allowing the claimant, or representative, to identify any errors of law or fact in a prior decision.

Finish Processing

The third step in the intake process requires you to complete a list of tasks outside of Caseflow Intake. These tasks must be completed in VBMS before you may proceed to the next step. The list of task will vary based on the Opt-in Election selected in the previous step. You will be required to confirm the completion of the tasks before proceeding to the next step and Intake closes the VACOLS record.

1. Complete listed tasks in VBMS.
2. Click checkbox next to **I'm ready to move to the next step and close the VACOLS record** to confirm completion of all tasks and to close the VACOLS record.
3. Click **I've completed all steps** button to continue to the next step.

Caseflow Intake | Washington, Martin (855555555) Mail Intake (DSUSER) ▼

1. Begin Intake 2. Review Request 3. Finish Processing 4. Confirmation

Finish processing Supplemental Claim election

Please complete the following steps outside Caseflow.

Step 1. Upload the RAMP Election form to the VBMS eFolder and ensure the Document Type is Correspondence.

Step 2. Update the Subject Line with "Ramp Election".

Step 3. Create an EP 683 RAMP - Supplemental Claim Review Rating in VBMS.

Step 4. Add a placeholder contention of "RAMP".

i This Veteran has 1 active appeal, with the following issues

Program	VACOLS Issue(s)	Note
02 - Compensation	15 - Service connection 03 - All Others 5252 - Thigh, limitation of flexion of	low back condition
02 - Compensation	15 - Service connection 03 - All Others 5252 - Thigh, limitation of flexion of	low back condition

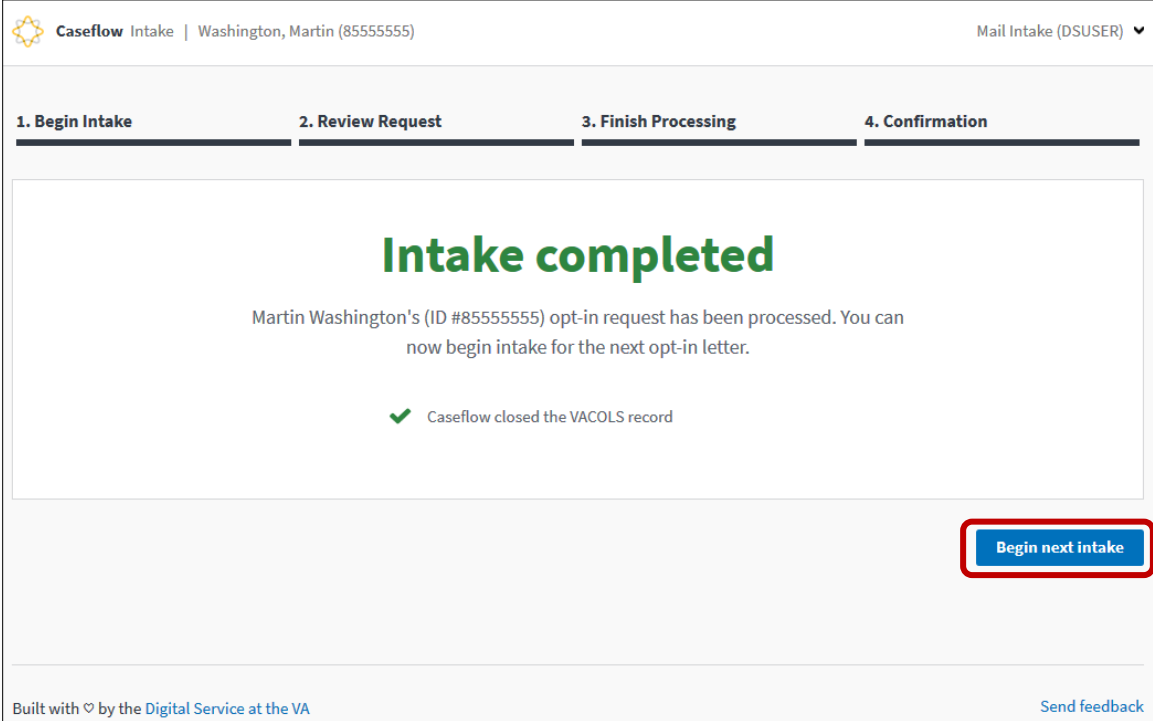
☐ I'm ready to move to the next step and close the VACOLS record. *Required*

Cancel Intake **I've completed all steps**

Confirmation

The Confirmation page, the final step in the Caseflow Intake process, confirms the completion of the Veteran's Opt-In request and the closing of the VACOLS record. You are now ready to begin the next intake.

1. Review the Confirmation page to ensure it is accurate.
2. Click **Begin next intake** to begin the next intake.

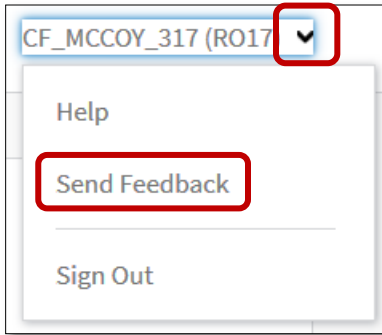


The screenshot shows the 'Caseflow Intake' interface for 'Washington, Martin (85555555)'. The top navigation bar includes the Caseflow logo, the user name, and a 'Mail Intake (DSUSER)' dropdown. Below the navigation bar is a progress bar with four steps: '1. Begin Intake', '2. Review Request', '3. Finish Processing', and '4. Confirmation'. The '4. Confirmation' step is currently active. The main content area displays 'Intake completed' in large green text. Below this, a message states: 'Martin Washington's (ID #85555555) opt-in request has been processed. You can now begin intake for the next opt-in letter.' A green checkmark icon is followed by the text 'Caseflow closed the VACOLS record'. At the bottom right, there is a blue button labeled 'Begin next intake' which is highlighted with a red rectangular border. The footer contains the text 'Built with ♥ by the Digital Service at the VA' on the left and a 'Send feedback' link on the right.

Note: Information captured in Caseflow Intake is not saved to VBMS or VACOLS. It is saved to Caseflow.

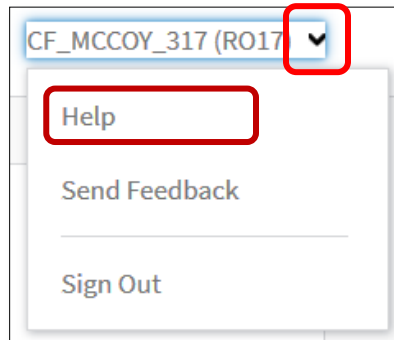
Sending Feedback

- Click the arrow next to your username in the upper right-hand corner and select **Send Feedback** from the dropdown menu to send feedback to the Caseflow Product Support Team.



Need Additional Help?

- Click the arrow next to your username and select **Help** from the dropdown menu to access the Intake Frequently Asked Questions (FAQs), for more information about Intake.



If you need technical support, would like to provide feedback, or would like to make a new feature request, reach out to the Caseflow Product Support Team by phone (**1-844-876-5548**) or email: caseflow@va.gov.