VSR Case Generator Worksheet

Sequence	
Name	BOCEPHIS, Henry
Claim #:	6Y09XX00
Branch of Service	Navy
Period of Service	08/01/2000 – 07/31/2012
Type of Claim	130 - Dependency
Contentions	Dependency for Christopher and Dependency for Joseph
FDC Y/N	N/A
FDC Exclusion Y/N	N/A

VA Forms and Revision Date	Revision Date	Required: Y/N and Details
VA Form 21-526EZ	03/2018	
VA Form 21-22	08/2015	Y, AL, Y/Y (074)
VA Form 21-4138	12/2017	
VA Form 21-0966	08/2018	
VA Form 21-686c	06/2017	Y, missing SSNs for both dependents, only provided month and year of marriage
VA Form 21-674	06/2018	
VA Form 21-0538	12/2017	
VA Form 21-0781	07/2017	
VA Form 21-0781a	07/2017	
Standard 5103 Letter		
3101		
BIRLS SHARE Screen		
Rating Decision		Y, showing Veteran rated at 50% since 12/30/2016, notified of decision in June 2017.
CAPRI Records		
ERB/ERRA		
DBQ		

Supporting Documents	Required Y/N
DD214	Instructions explain DD214 is of record and service is verified.
CAPRI Enterprise Search	N/A
Private Medical Records	N/A
SF88 Entrance Exam	N/A
SF88 Separation Exam	N/A
Service Treatment Records	N/A
Personnel Records	N/A
DOMA first request letter	N/A
DOMA final letter	N/A

Scenario Comments

1. Upload all documents for this scenario to the VBMS eCase
2. Properly label and establish date of receipt
3. Associating all documents to correct EP
4. Bookmark medical and dependency documents (at minimum)
5. Update subject line
    > Subject: VA Form 21-686c with additional documents
    > Category – Type: VA 21-686c Application to Add And/Or Remove Dependents
    > ***Note: VBMS has removed the old forms from the system.***
    > Content Source: VBMS
    > Date of Receipt – date of receipt on the 21-686c as received from SEP.

6. CEST EP 130 - Dependency
    Input Contentions:

Contention: Dependency claim for Christopher Classification: Administrative Issue Date of Contention: (DOC) Verified: Yes Type: New Medical: No Special Issue: Local Mentor Review	Contention: Dependency claim for Joseph Classification: Administrative Issue Date of Contention: (DOC) Verified: Yes Type: New Medical: No Special Issue:

7. Trainee, after reviewing the supplied documents will need to identify the following key points:
    * Veteran is rated at 50% since June 2016
    * Veteran's POA submitted the claim via SEP so the outdated 21-686c is accepted and development is required
    * Trainee will need to identify that a phone call is necessary to obtain the missing SSNs and the full date of the marriage.
8. A subsequent development letter is required with the following development actions:
    * Claimant – date of current marriage needed; trainees will need to add the name of the spouse to clear the caution sign.
    * Dependent Social Security Number SSN needed; trainees will need to add the dependent names to clear the caution sign.
9. Tracked items will be:
    * Claimant – date of current marriage needed – suspense of 30 days
    * Dependent Social Security Number (SSN) needed – suspense 30 days
10. Trainee must enter a note into **VBMS**: Permanent associated to Claim, 130 – Dependency: Attempted to call the Veteran to obtain full SSNs and the full date of marriage. Call unsuccessful, development letter sent.
11. Trainees will need to use Package Manager to send the letter to the Veteran and the POA. They must take the following steps:
    * Under the Veteran drop down menu select Package Manager

- Under the Distributions tab, the American Legion and Henry Bocephis are listed as recipients
- Click Create
- Existing Packages screen appears, click the radio button for the subsequent development letter, then click the Create button
- Select Henry Bocephis, Recipient Type: Individual, click the box Veteran is Recipient
- Select American Legion, Recipient Type: Organization, click the Co-located organization, Station of Jurisdiction is 313 Baltimore Regional Office
- Click Send Package

References:

Note: M21-1 III.iii.5.A.1.j Creating a Letter That Requests Information/Evidence VA Requires to Recognize an Individual as a Dependent is out of date. The manual instructs to use a Custom Development Action. The Dependency development paragraphs exist inside of VBMS and should be used by the trainees. Dependency development will eventually become a very limited action based on the use of the September 2018 version of the 21-686c or later.

Scenario	Reference	Title
2-5	M21-1 III.ii.4.G	Folder Maintenance
6	M21-1 III.ii.3.B M21-1 III.iii.1.F.2.a M21-4 Manual	Claims Establishment Identifying Contentions Appendix B: End Product Codes and Work-Rate Standards for Quantitative Measurements Appendix C: Index of Claim Attributes Appendix D: Index of Claim Stage Indicators
7	M21-1 I.3.A.4.b M21-1 III.ii.1.C.8.a M21-1 III.i.4.B.2.j M21-1 III.i.4.B.2.h	Representative's Authority to submit Claims and Other Claim-Related Documents Accepting Outdated Versions of VA Forms System Annotations on Claim Document Submitted Through SEP Signature Page Characteristics for Non-original Claims Submitted Through SEP
8 and 9	M21-1 III.iii.5.A.1.j M21-1 III.iii.5.A.4.b M21-1 III.iii.5.A.4.d M21-1 III.iii.5.A.5.a VBMS User Guide	Creating a Letter That Requests Information/Evidence VA Requires to Recognize an Individual as a Dependent Handling an Incomplete Form – Disability Compensation or DIC Handling a September 2018 or Later Version of VA Form 21-686c That is Incomplete – Disability Compensation or DIC Regulatory Basis for Requiring Disclosure of SSNs Chapter 18 – Letters, Associated Development Actions Section
10	M21-1 III.iii.5.A.4.b	Handling an Incomplete Form – Disability Compensation or DIC
11	VBMS Users Guide	Chapter 11 – Veteran Information, Package Manager