***VSR Case Generator Worksheet***

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| 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** |

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| 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 |  |  |

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| 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** |

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| 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.   1. 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: | Note to Instructor, review with the trainees the requirement to add the Corporate Flash, Agent Orange – Vietnam. Explain that they are unable to do this in VBMS Demo but will be required to do so in the VBMS live environment. |  1. 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.  1. 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.  1. Tracked items will be:  * Claimant – date of current marriage needed – suspense of 30 days * Dependent Social Security Number (SSN) needed – suspense 30 days  1. 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. 2. 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 VII.i.1.A 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 II.ii.2.A | Folder Maintenance | | 6 | M21-1 II.iii.3.A | Claims Establishment | | M21-1 III.iii.1.F.2.a | Identifying Contentions | | M21-4 Manual | Appendix A: Regional Office Station Numbers, Payee Codes, and Work-Rate Standards  Appendix B: End Product Codes  Appendix C: Index of Claim  Labels  Appendix D: Index of Claim Stage Indicators  Appendix E: Index of Corporate Flashes and Special Issues | | 7 | M21-1 I.3.A.4.b | Representative’s Authority to submit Claims and Other Claim-Related Documents | | II.i.2.B.4.a. | Accepting Outdated Versions of VA Forms | | II.iii.4.B.2.j. | System Annotations on Claim Document Submitted Through SEP | | II.iii.4.B.2.h. | Signature Page Characteristics for Non-original Claims Submitted Through SEP | | 8 and 9 | VII.i.1.A.1.j. | Creating a Letter That Requests Information/Evidence VA Requires to Recognize an Individual as a Dependent | | VII.i.1.A.4.b. | Handling an Incomplete Form – Disability Compensation or DIC | | VII.i.1.A.4.d. | Handling a September 2018 or Later Version of VA Form 21-686c That is Incomplete – Disability Compensation or DIC | | VII.i.1.A.5.a. | Regulatory Basis for Requiring Disclosure of SSNs | | VBMS User Guide | Chapter 18 – Letters, Associated Development Actions Section | | 10 | VII.i.1.A.4.b. | Handling an Incomplete Form – Disability Compensation or DIC | | 11 | VBMS Users Guide | Chapter 11 – Veteran Information, Package Manager | |