**Claims and Advocacy**

**4.1 Day to Day Operations in Claims and Advocacy**

* Ensure that you selected the claims and advocacy department at the bottom left of the page
* For managing Claims and Advocacy items for a contact, navigate to the ‘Claims and Advocacy’ tab in the contact record. From here you can view that client’s Claim cases, advocacy cases and individual claim items

**4.2 Create a Case for Liability or Post Liability**

* A case is created to track the progress and details of cases/claim items submitted to DVA
* A case can contain one or more claim items depending on what the veteran is claiming
* Only one case should be created per legislation (If a veteran is claiming the same condition under VEA and DRCA you need to create two separate cases)

**4.3 Create a New Claims Case**

Once a new case has been created from the Claims and Advocacy tab, set the case type (located in the top left below the case name) to Claim, then complete the following fields:

* Case Area - Set to you location
* Type – Set to Claims and Advocacy
* Sub-Type – Set to Claim
* Waiting On Client (yes/no)
* Consent Received (date)
* Case Claim Type
* Self-Submitted
* Acts (DRCA/VEA/MRCA)
* Paperwork fields (Due Date, Received?, Set Recurring Reminder?)
* Description

Now you can save the claim via the save button at the very top left of the record. This will automatically generate a name for the case as well.

**4.4 Add Claim Items to the Case**

* Select the three vertical dots under the Claim Items heading in the ‘Summary’ tab on the case page
* The drop-down list will include the option for a New Claim Item
* Select New Claim Item

This will take you to a New Claim Item record view. Here you’ll complete the following fields:

* Condition – enter the condition eing claimed, as clse
* Classification – select claim
* SOP
* Reasonable Hypothesis
* Case
* Contact
* Legislations (MRCA/VEA/DRCA)
* Medical Dates (Identification and Diagnosis)

The following areas will be completed when a determination is received from DVA:

* Admin
* Rejection Reason
* Determined By

You can now save the claim item through the save button at the top left.

**4.5 Change of Status Case**

* Once all fields are completed do not change the claim status
* From here navigate back to the case by selecting the case title from the Case field. This will take you back to the case level where you can create or select more claim items.
  1. **Claim Item Summary Within the Case**

Updates to the case and claim items such as submissions or determination need to occur at the case level, this will automatically update all claim items at once.

Once all claim items have been created, you will see a summary of them from the case view. This will show each claim items name, status and number of claims.

**4.8 Change status and submitting of a claim**

Claims are submitted via organisations SOP – this might be paper form via post, email, or using the DVA ‘MyGov’ portal.

Regardless of method of submission CRM is updated as follows:

* Ensure everything at the case level is correct including the title
* Select the drop-down arrow next to the owner name in the top right-hand corner
* In the small menu that pops up:
* Update the claim status to submitted
* Update the ‘claim submitted’ date field

**5. Accepting a Claim**

Once claims have been determined by DVA the CRM needs to be updated to reflect the new status according to the following steps:

* Update DVA Determination date
* Update the delegate contact details of the delegate that made the determination
* Update each claim item as required with SOP and RH/BOP
* Update the claim status to accepted
* \*Note\* - If call claim items have been accepted there is no requirement to individually change the claim item status, this will occur automatically from the case level

**6. Rejected Claims**

Once claims have been determined by DVA the CRM needs to be updated to reflect the new status, follow the following steps to update a case when claims are rejected:

* Update DVA determination date in the Dates field
* Update the delegate contact details for the delegate that mad the determination
* Update each claim item as required with SOP and RH/BOP
* Update the claim status to rejected
* \*Note\* - If all claim items have been rejected there is no requirement to individually change the claim item status, this will occur automatically from the case level

**7. Mix Accepted/Reject Claim Items**

Once claims have been determined by DVA the CRM needs to be updated to reflect the new status, follow the following steps to update a case when a determination comes back with both accepted and rejected claim items:

* Update DVA determination date in the Dates field
* Update the delegate contact details for the delegate that made the determination
* Update each claim item as required with SOP and RH/BOP
* Update the claim status to either rejected or accepted
* If the veteran is intending to appeal a rejected claim, this is where appeal bust be selected at the claim item level
* For claims that are accepted, select the ignore bulk update field

**8. Create an Appeal**

Once claims have been determined by DVA this may result in a rejected claim item that needs to be appealed, follow the following steps to create a case for appeal:

* Update DVA determination date in the Dates field
* Update the delegate contact details for the delegate that made the determination
* Update each claim item as required with SOP and RH/BOP
* Make sure to select the ‘appeal’ checkbox for each claim item that is being appealed
* Make the appropriate changes to the claim status by choosing claim rejected or partial rejection, this needs to occur from the individual claim item
* If an appeal is being created for a case with both accepted and rejected conditions you must select ‘Ignore Bulk Update’ for the items that were accepted