

## Improving the Veteran-Accredited Representative Experience

### Opportunity (aka Overview)

The mission of the Benefits Portfolio's Accredited Representative crew is to reduce the time it takes for Veterans to receive assistance from an Accredited Representative and reduce the time it takes Representatives to help Veterans receive benefits from the VA. This mission supports the high-level Benefits Portfolio strategy of "Make Veteran and VA interactions more digital." which includes:

- Maximize digitized benefit transactions: Turn more forms into interactive experiences on VA.gov.
- Maximize audiences for digital options: Expand digital application options to non-Veterans

The official beginning of the Veteran-Representative relationship is VA form 21-22 for Accredited VSO Representatives and form 21-22a for Accredited Claims Agents and Attorneys. This form establishes the power of attorney allowing the Representative to act on the Veteran's behalf to "prepare, present, and prosecute...claims for any and all benefits from the Department of Veterans Affairs (VA)."

Veterans and claimants who seek out representation [need help understanding and navigating VA processes](#), and do not feel equipped to handle the task themselves. This could be due to mental or medical challenges, physical disabilities, peer pressure, lack of time to commit to the task, discomfort with government processes, etc. Veterans can find accredited representatives via the [Find a Representative tool on VA.gov](#) (launched in March 2024), however the Representative [contact information presented here can be out of date](#).

### Problem Statement

Currently, the Veteran-Representative experience is hindered by a reliance on slow, outdated (to be decommissioned by September 2025) digital systems and/or paper claims submissions.

While some Veterans may prefer to meet with a Representative in person at the beginning of their relationship in order to establish trust, Veterans can also face long travel times and long waiting times for these in-person appointments.

Representatives rely on the ( to be decommissioned by September 2025) [Stakeholder Enterprise Portal](#) (SEP) to submit the countersigned 21-22 form to the VA in order to gain immediate access to the Veteran's efolder in Veterans Benefits Management System (VBMS) and subsequently submit Veteran's claim(s) via SEP. Currently, new users cannot be added to SEP due to inadequate user authentication standards. Additionally, in the past, the process to verify new SEP user was manual and complex. SEP uses (soon-to-be-deprecated) APIs to file Veteran claims.

The Representative ecosystem is also hindered by unclear [Veteran expectations of the Representative role](#), [large Veteran caseload volume for Representatives](#), complex VSO relationships (State, County, multi-org accreditation), [outdated Representative contact information and complex processes for updates](#), accreditation application backlogs (due in part to manual form processing), in addition to technical challenges blocking faster development of new systems.

The key [stakeholders](#) in this work includes VBA's Office of Benefits Administration, Office of Information Technology's (OIT) Veteran Experience Services team (VES), Veteran Experience Office's (VEO) Digital Experience team in the Channel Strategies and Engagement Division, and Office of General Council's (OGC) Benefits Law Group. These diverse stakeholders create a complex environment of expectations and requirements. As part of a VA customer service initiative, OBA has a contractor team that developed a set of ["SEP replacement" requirements](#) in addition to the [OIT BIOS Epic](#) defining the work prioritized on OIT's 1-N list.

The development and launch of new tools for representatives blocks a years-long initiative to shut down outdated and expensive APIs supporting claims submission and evidence upload known as the EVSS claims evidence API and others. That shut down is currently scheduled for March 2025, a deadline that will not be met with full replacement tools. The goal should be to fully launch the new Accredited Representative Portal by the end of FY2025 (September 2025).

## Hypothesis

The VA can maximize digitized benefits transactions and maximize the audience for digital transactions by building secure, modern, accessible tools for Accredited Representatives to manage their relationship with Veterans and VA. *By helping Accredited Representatives, we will help Veterans receive their benefits quicker.*

## Users

**Veterans** seeking assistance from accredited representatives to apply for and receive benefits from the VA.

### Accredited Representatives

There are 3 types of VA accredited representatives:

- *Accredited VSO Representatives:* An accredited VSO representative (VSOR) can help Veterans gather evidence, file a claim, or request a decision review. These representatives can communicate with VA on a Veteran's behalf. The services that an accredited VSO representative provides on VA benefit claims are always free. Veterans use accredited VSO representatives more often than other types of representatives on initial benefit claims.
- *Accredited attorneys and claims agents:* Some VA-accredited attorneys and claims agents provide services for free on initial claims. But most accredited attorneys and claims agents offer their services after the VA made a decision on a Veteran's initial claim. At this stage in the claims process, the VA permits them to charge fees for their services. Accredited attorneys and claims agents can help gather additional evidence and write legal arguments for a Veteran's Supplemental Claim, Higher-Level Review, or appeal to the Board of Veterans' Appeals.

All VA-accredited representatives are authorized to provide help with VA benefit claims to Veterans and service members, as well as their dependents and survivors.

### Veteran Service Organization Certifying Officials

VSORs are recommended for accreditation by Veteran Service Organizations. Each organization has at least one [Certifying Official](#) who oversees the accreditation process and communicates with the VA's Office of General Counsel Business Law group (OGC BLG) about things like [address updates](#) and changes in representative status.

### Applicants to Become Accredited Claims Agent or Attorney

Prospective claims agents and attorneys use [VA forms 21](#) (VSORs) and [21a](#) (attorney and claims agents) to apply to become accredited. This process is currently paper-based. These forms will be digitized.

### VA Employees (Office of General Counsel's Business Law Group)

The VA's Office of General Counsel's Business Law Group administers the VA accreditation process. To get accredited, a person must have good character and a good reputation. They must be capable of providing responsible, qualified representation.

The requirements are specific to the type of accreditation. Here are some of the requirements to becoming accredited:

- An VSO representative must be recommended to the Office of General Counsel by a VA-recognized VSO
- An attorney must be a member in good standing of at least one state bar
- A claims agent must pass a written test about VA laws and procedures

These administrators will access data submitted via Forms 21 and 21a (the application forms) to review applications via the front end of the GCLAWS system. There is currently a backlog of 2000+ 21 and 21a forms, and these applications are not processed using automation of any kind.

### Blockers and Dependencies

- [Jen's Big Problems List](#)
- [Request table storage/backwards compatibility](#)
- [ARF team list of 21a blockers](#)

### In-Progress Workstreams

- Accredited Representative Portal [Pilot: 21-22 accept/reject MVP](#)
  - Team: ARF
  - Timeline: February-March 2025
  - Launch Plan: [early draft outlined from Jen](#) and [tentative roll out draft](#) from Alex (need to scroll in this doc)
  - Open workstreams:
    - User authentication
    - Header/footer iteration (customize to representative-specific needs)
      - [Feedback on current footer](#)
      - [Exploration](#) of non-Veteran Facing VA headers and footers
    - 21-22 request – table storage location decision needed
  - Timeline: Post launch of full ARP portal functionality
- Accredited Representative Portal: claims submissions – not started
- Accredited Representative Portal: [Contact information update flows](#) (representatives, claims agents, and attorneys)
  - Status: On hold pending ARP Pilot and full launch
- Appoint a Rep MVP: Form 21-22 (and 21-22a) Digital Fill and **Print to Submit**
  - Team: ARM
  - [Product Brief](#)
  - Timeline: launching early December 2024
  - Launch Plan:
  - Blockers: None?
- Appoint a Rep 2.0: Form 21-22 Digital Fill and **Digital Submit**

- Team: ARM
- [Product Brief](#)
- Timeline: Must launch with ARP Portal pilot below (February-March 2025?)
- Launch Plan: to be built collaboratively across both teams. Ideas here and here.
- Blockers: decision on table storage and launch of Accredited Representative Portal: 21-22 accept/reject MVP
- Blockers: ESECC MOU to connect vets-api and the GCLAWS API in production plus testing the API connection in production and the support for the 94 new fields requested by OGC's BLG
- [Form 21a](#) (application to become an accredited claims agent or attorney that will live within the AR Portal)
  - Status: On hold pending ARP Pilot and full launch

## Desired User Outcomes

### ARP Pilot (March 2025)

Accredited Representatives, Attorneys, and Claims Agents can:

1. Login to the Portal
2. Search for Veteran & pending POA request
3. Review a 21-22 or 21-22a POA pending request
4. Accept or deny POA request
5. View accepted or denied POA requests
6. Receive instant access to a Veteran's efolder on VBMS

### ARP Claims Submission (by September 2025)

Accredited Representatives, Attorneys, and Claims Agents can:

1. Submit Dependency forms (686c and 674)
2. Submit a Disability Compensation form (526)
3. Submit an Intent to File on behalf of a Veteran or other claimant (form 0966) (note: ideally this could happen automatically along with the acceptance of the 21-22 POA request)
4. Upload supporting claims documentation as part of claim form listed above
5. All forms should reflect the most up-to-date version of the form on VA.gov

### ARP ["full SEP replacement" Functionality](#)\*

Accredited Representatives, Attorneys, and Claims Agents can:

1. See ARP Pilot above
2. See 1, 2, 4, and 5 under Claims Submissions above
3. View accurate, real-time claim status information for the Veterans they represent

4. Submit education claims
5. Submit VR&E claims
6. Submit higher level reviews and appeals
7. Update Veteran contact information

\*Note: OCTO sees this work as building the modern tools needed to help accredited representatives support Veterans. However, this work may also be referred to as “SEP migration” or “SEP replacement.” We are not building “lift and shift” 1:1 SEP replacement tools. We are defining the tools and systems (like secure authentication and Intent to File submitted alongside the 21-22 acceptance) based on the accredited representatives needs and prioritizing them first. For example, contact information updates are not possible via SEP but our work within this ecosystem has identifying outdated representative contact information as an important pain point to solve for Veterans and representatives. Additionally, the “work queue” workflow tools in SEP will not be rebuilt because they are used only by one specific Veteran Service Organization.

#### Representative contact information (digital)

Accredited VSO Representatives can provide their updated contact information and send it to their certifying official at the organization holding their primary accreditation to request a contact information update.

Certifying Officials can review requests from VSO representatives to update their contact information and submit updated contact information to OGC’s BLG for review and update.

Attorneys, and Claims Agents can submit their updated contact information to OGC’s BLG for review and update.

#### Future Tools in ARP

- Prospective claims agents and attorneys can apply to become accredited (VA form 21a)
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#### Measuring Success

Accredited Representative Portal - 21-22 accept/reject MVP pilot:

- % of invitees who participate – adoption
- % of return users
- Calls to help desk (va.gov)
- % of users who update contact information?
- Do we get 900 POAs in a month? (SEP gets approx 900 accepted 21-22s per month)

## Accredited Representative Portal (full launch):

- **Proposed KPI: increase 21-22s submitted by Veterans by 10% (17,422 21-22s submitted to SEP by Veterans in calendar year 2023)**
- Proposed Revision (from Jen): increase 21-22s accepted by Representatives by X% (baseline is 11,395 21-22s accepted in calendar year 2023)
- Maybe the ARM team could take a KPI of: increase 21-22s submitted by Veterans by 10% (17,422 21-22s submitted to SEP by Veterans in calendar year 2023)? The ARM team owns the 21-22 form on va.gov for Veterans to submit requests for POA. The ARF team owns the new ARP tool and the flow for representatives to accept or deny 21-22 requests.
- **Proposed KPI: Reduce the number of paper submissions for POA requests by 2% from the 441,740 paper submissions (excluding quick submit) in CY23.**
- **Proposed KPI: Increase the percentage of logins per month vs SEP by 10-15%. Currently the SEP average is approximately 2,233 logins per month.**
- I recommend we don't use this one because we don't have a baseline: **Number of transactions processed by using the Accredited Representative portal products increased by 10-15%.**
- Proposed KPI: Establish a benchmark customer satisfaction score for Accredited Reps for customer functionality usability

## Key Partners

See [Stakeholder document](#).

## Next Steps

### Specific priorities:

- Launch the Accredited Representative Portal [Pilot: 21-22 accept/reject MVP](#) in February-March 2025 (starting points: understand technical blockers and open workstreams, define launch plan, and create a roadmap to meet this deadline)
- Discover (and roadmap) how and when we might help representatives file dependents (686c and 674) and disability (562) claims digitally from the AR Portal, including upload of supporting claim documentation. Ideally this will happen before September 2025.
- Understand and prioritize additional workstreams including:
  - Submit an Intent to File on behalf of a Veteran or other claimant (form 0966) (note: ideally this could happen automatically along with the acceptance of the 21-22 POA request)
  - View accurate, real-time claim status information for the Veterans they represent
  - Submit education claims
  - Submit VR&E claims

- Submit higher level reviews and appeals
  - Update Veteran contact information
  - Update accredited representative contact information
  - Updated accredited claims agent and attorney contact information
  - 21a
- Prioritization could be done with a modified RICE framework building on the [Benefits prioritization framework](#).
- Note that all new claims submissions processes must follow Zero Silent Failures best practices.