



CASEFLOW

Intake Training Guide



DIGITAL SERVICE at VA

Revision Date	Summary of Changes	Version	Author
April 2018	Initial Release	1	

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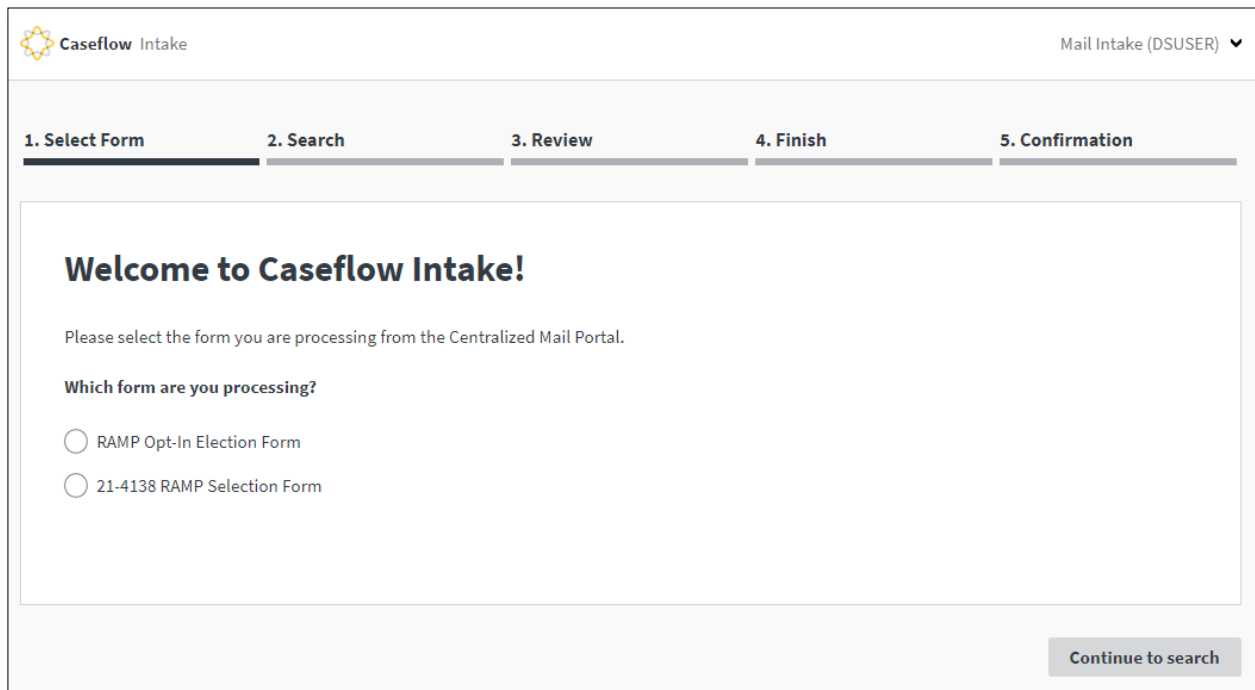
Caseflow Intake – Training Guide

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. It will also process 21-4138 RAMP Selection for SC, HLR, or Appeal to the Board. Intake was built by the Digital Service at VA (DSVA).

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 **Welcome to Caseflow Intake!** (or **Select Form**) page.



Caseflow Intake

Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Welcome to Caseflow Intake!

Please select the form you are processing from the Centralized Mail Portal.

Which form are you processing?

☐ RAMP Opt-In Election Form

☐ 21-4138 RAMP Selection Form

Continue to search

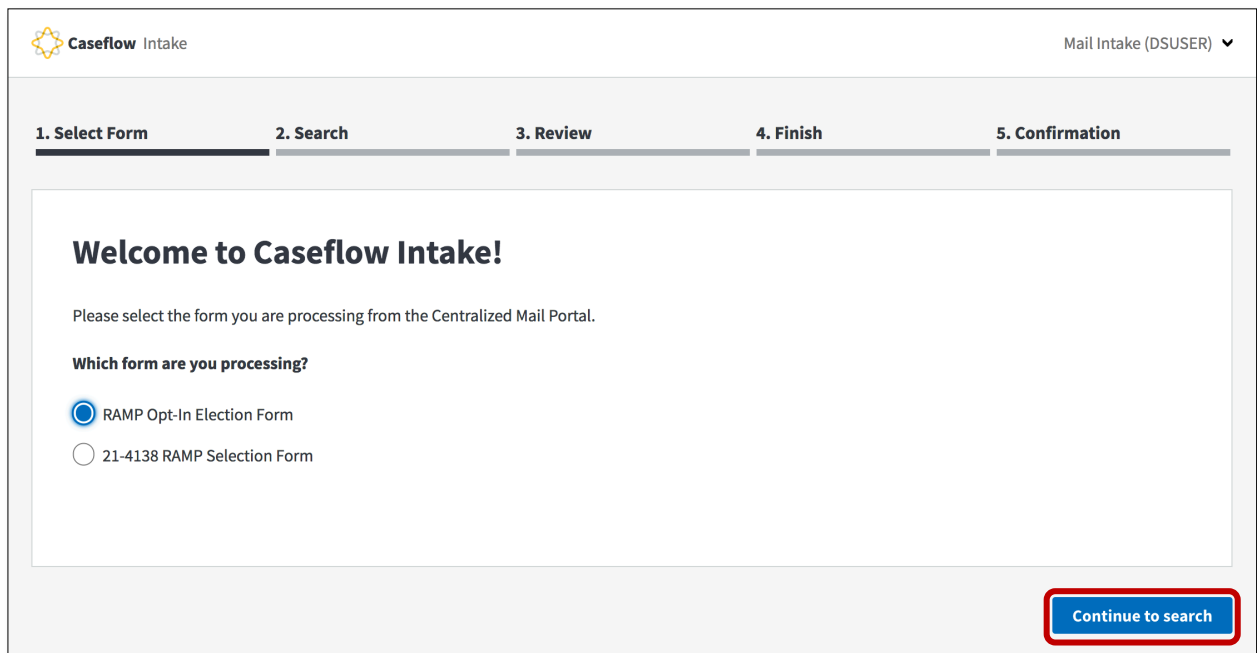
Processing an Opt-in Request

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.

Select Form page

1. Click the **RAMP Opt-in Election Form**.
2. Click **Continue to search** to search for the Veteran's ID.



Caseflow Intake Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Welcome to Caseflow Intake!

Please select the form you are processing from the Centralized Mail Portal.

Which form are you processing?

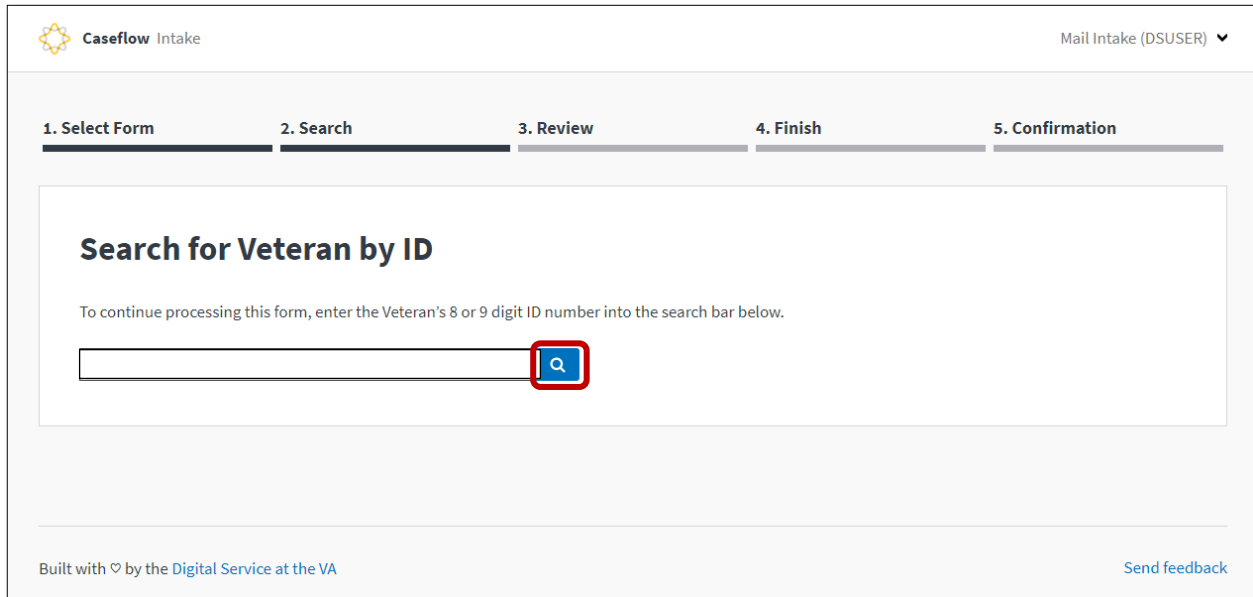
☒ RAMP Opt-In Election Form

☐ 21-4138 RAMP Selection Form

[Continue to search](#)

Search page

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.

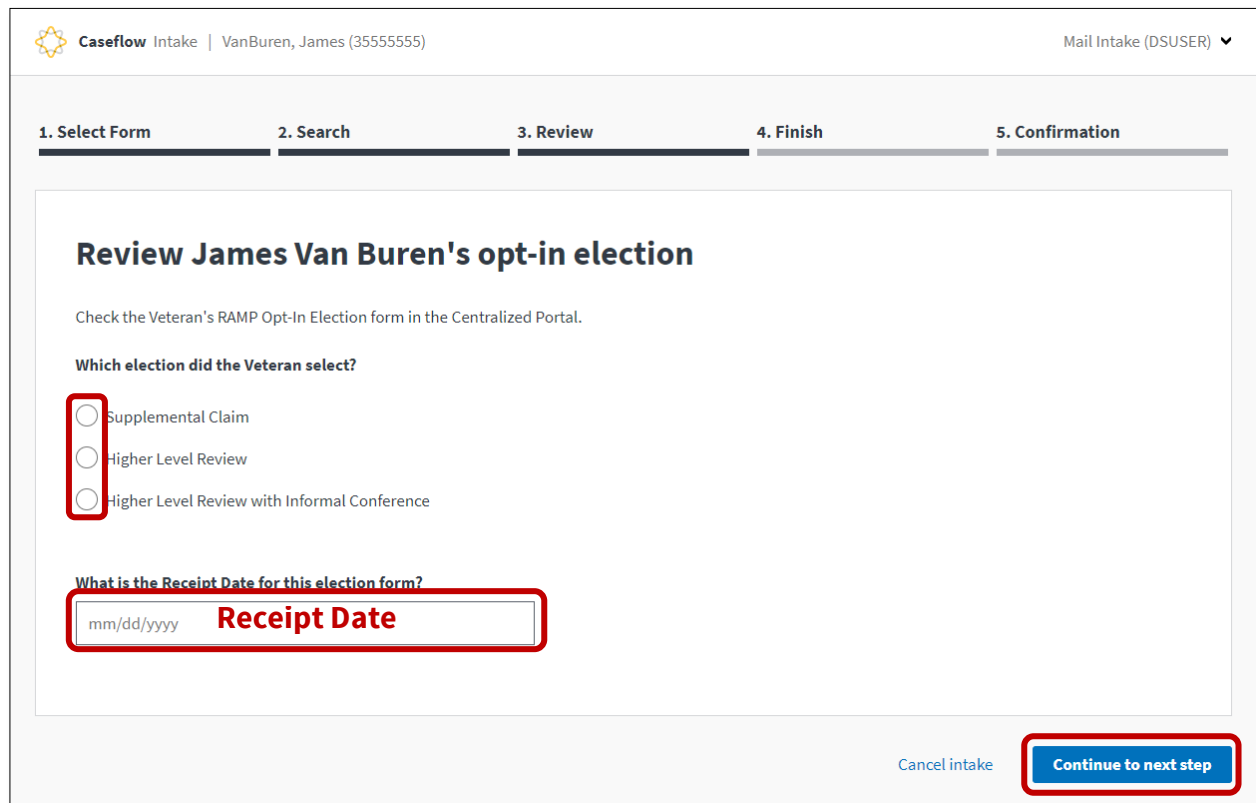


The screenshot shows the Caseflow Intake web application interface. At the top left is the Caseflow Intake logo. At the top right is the user name 'Mail Intake (DSUSER)' with a dropdown arrow. Below the header is a progress bar with five steps: '1. Select Form', '2. Search', '3. Review', '4. Finish', and '5. Confirmation'. The '2. Search' step is currently active. The main content area is titled 'Search for Veteran by ID'. Below the title is a text instruction: 'To continue processing this form, enter the Veteran's 8 or 9 digit ID number into the search bar below.' There is a text input field followed by a blue search icon button, which is highlighted with a red square. At the bottom of the page, there is a footer with the text 'Built with ♥ by the Digital Service at the VA' on the left and a 'Send feedback' link on the right.

Review page

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.



Caseflow Intake | VanBuren, James (35555555) Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Review James Van Buren's opt-in election

Check the Veteran's RAMP Opt-In Election form in the Centralized Portal.

Which election did the Veteran select?

☐ Supplemental Claim

☐ Higher Level Review

☐ Higher Level Review with Informal Conference

What is the Receipt Date for this election form?

mm/dd/yyyy **Receipt Date**

Cancel intake **Continue to next step**

Opt-in Election Options

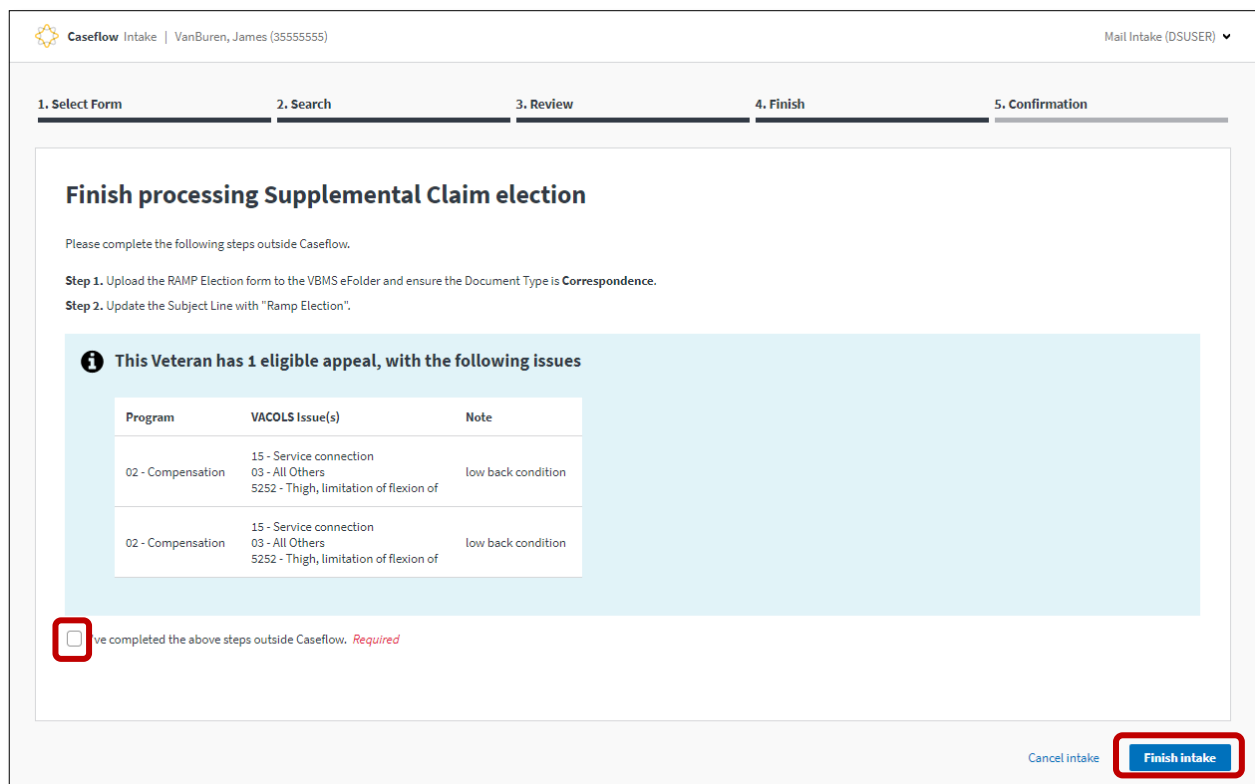
- A **Supplemental Claim** (SC) is a request by an appellant to have their appeal(s) reviewed by Veterans Benefits Administration (VBA) based on additional evidence that is new and relevant to the benefit(s) sought.
- A **Higher-Level Review** (HLR) under RAMP will consist of a de novo review (higher level review, usually completed by someone other than the original reviewer) 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 page

The fourth 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 tasks 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've completed the above steps outside Caseflow** to confirm completion of all tasks.
3. Click **Finish intake** button to continue to the next step.



Caseflow Intake | VanBuren, James (35555555) Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. 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".

i This Veteran has 1 eligible 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

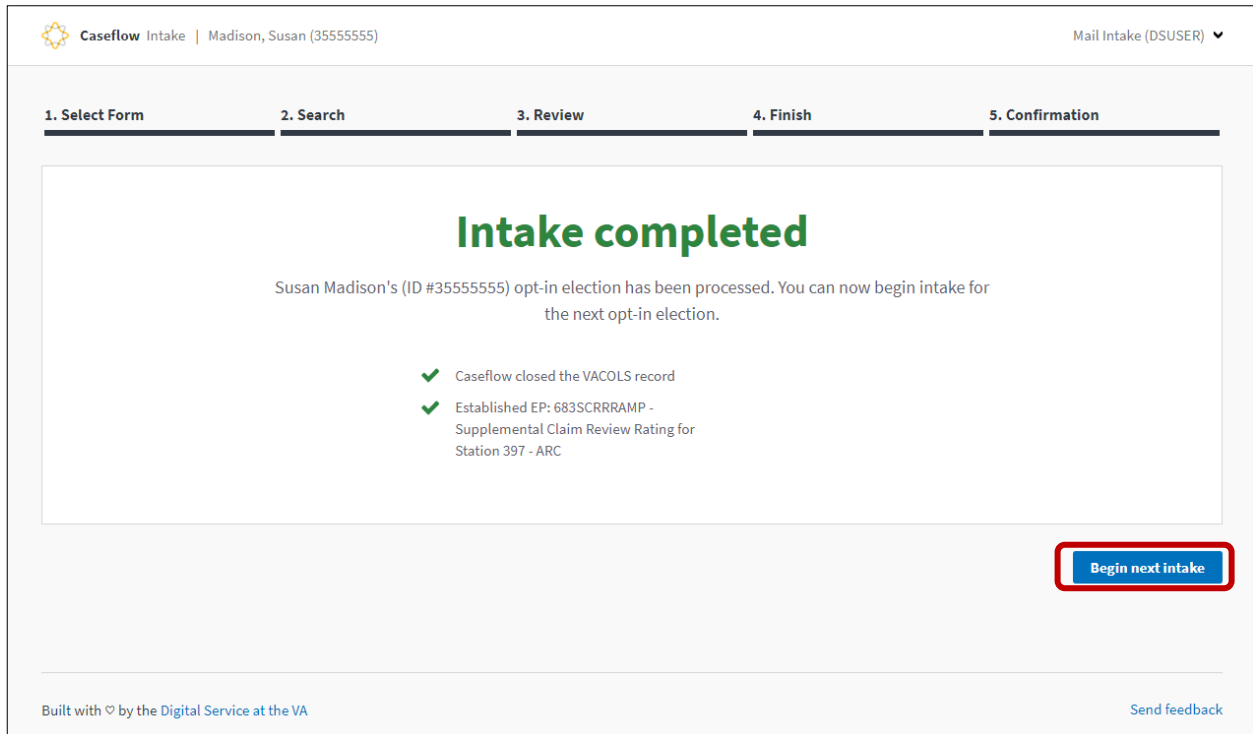
☐ I've completed the above steps outside Caseflow. *Required*

Cancel intake **Finish intake**

Confirmation page

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 for any additional instructions, if applicable.
2. Click **Begin next intake** to begin the next intake.



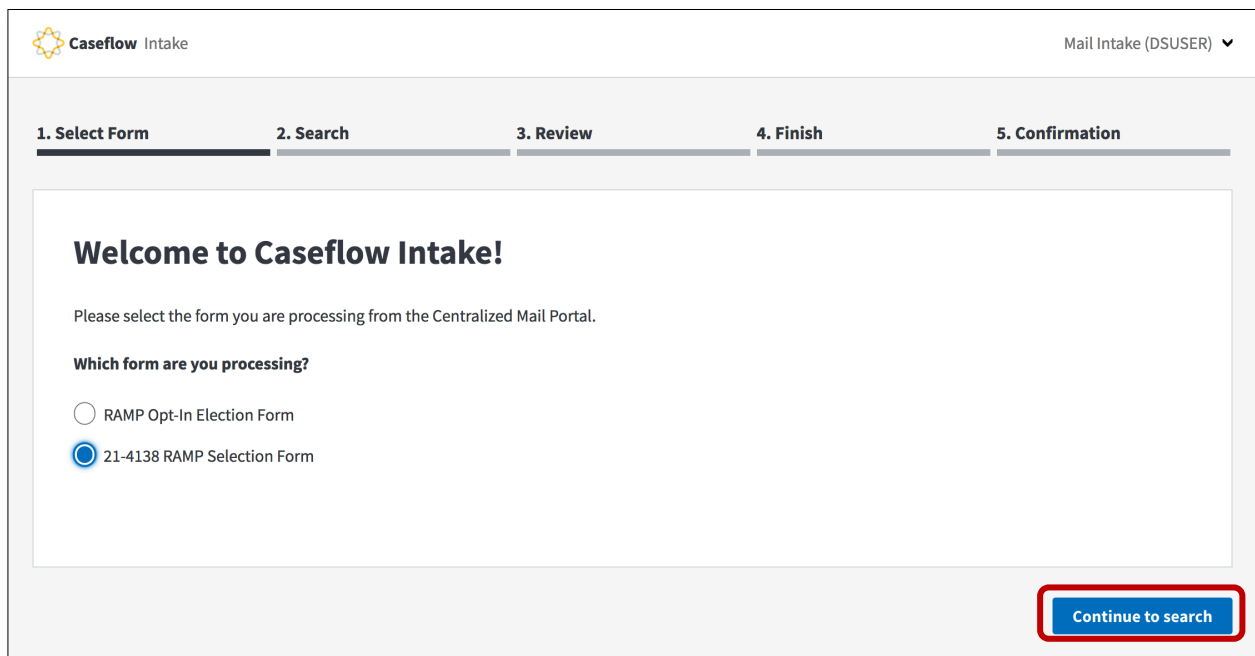
The screenshot shows the Caseflow Intake Confirmation page for user Susan Madison (ID #3555555). The page has a header with the Caseflow Intake logo and user information, and a navigation bar with five steps: 1. Select Form, 2. Search, 3. Review, 4. Finish, and 5. Confirmation. The main content area displays 'Intake completed' in large green text, followed by a message: 'Susan Madison's (ID #3555555) opt-in election has been processed. You can now begin intake for the next opt-in election.' Below this, there are two green checkmarks indicating successful actions: 'Caseflow closed the VACOLS record' and 'Established EP: 683SCRRAMP - Supplemental Claim Review Rating for Station 397 - ARC'. A blue button labeled 'Begin next intake' is highlighted with a red border in the bottom right corner. The footer includes the text 'Built with ♥ by the Digital Service at the VA' and a 'Send feedback' link.

Processing a 21-4138 RAMP Request

Once the Veteran receives the decision from their original RAMP Opt-in election, depending on whether he or she agrees with the decision, he or she has the option to file again using the 21-4138 Selection Form.

Select Form page

1. Click the **21-4138 RAMP Selection Form**.
2. Click **Continue to search** to search for the Veteran's ID.



Caseflow Intake Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Welcome to Caseflow Intake!

Please select the form you are processing from the Centralized Mail Portal.

Which form are you processing?

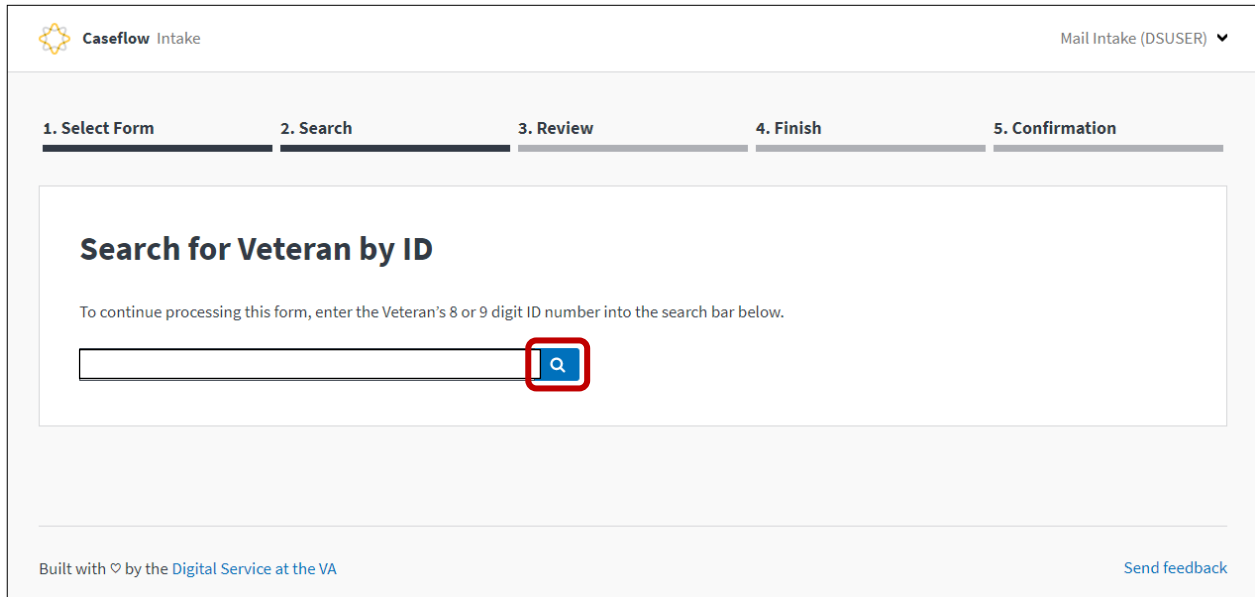
☐ RAMP Opt-In Election Form

☒ 21-4138 RAMP Selection Form

[Continue to search](#)

Search page

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 selection form.

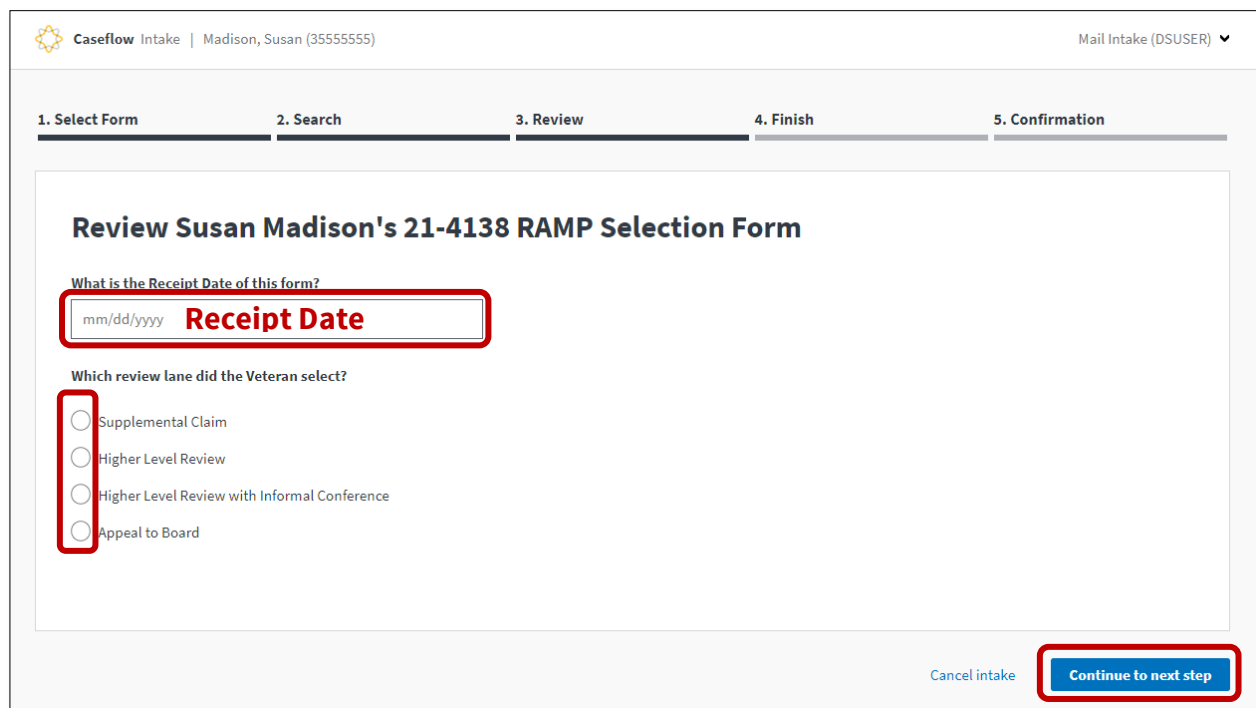


The screenshot shows the Caseflow Intake application interface. At the top, the Caseflow Intake logo is on the left, and the user is logged in as 'Mail Intake (DSUSER)' on the right. Below the header is a progress bar with five steps: 1. Select Form, 2. Search, 3. Review, 4. Finish, and 5. Confirmation. The '2. Search' step is currently active. The main content area is titled 'Search for Veteran by ID'. Below the title, a message states: 'To continue processing this form, enter the Veteran's 8 or 9 digit ID number into the search bar below.' There is a text input field for the ID number, and a blue search icon (magnifying glass) is located to the right of the input field, highlighted with a red square. At the bottom of the page, there is a footer that reads 'Built with ♥ by the Digital Service at the VA' on the left and a 'Send feedback' link on the right.

Review page

Review the Veteran's 21-4138 RAMP Selection Form in the Centralized Portal to verify the Veteran's selection lane.

1. Input the Receipt Date of the Veteran's selection form.
2. Select the review lane requested by the Veteran.
3. Click **Continue to next step** button to go to the next step (If "Appeal to Board" was requested, follow the instructions below).



Caseflow Intake | Madison, Susan (35555555) Mail Intake (DSUSER) ▼

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Review Susan Madison's 21-4138 RAMP Selection Form

What is the Receipt Date of this form?

mm/dd/yyyy **Receipt Date**

Which review lane did the Veteran select?

☐ Supplemental Claim

☐ Higher Level Review

☐ Higher Level Review with Informal Conference

☐ Appeal to Board

Cancel intake **Continue to next step**

NOTE: ARC employees will only process Supplemental Claims and Higher Level Reviews in Intake; "Appeal to Board" will be tracked by Board employees.

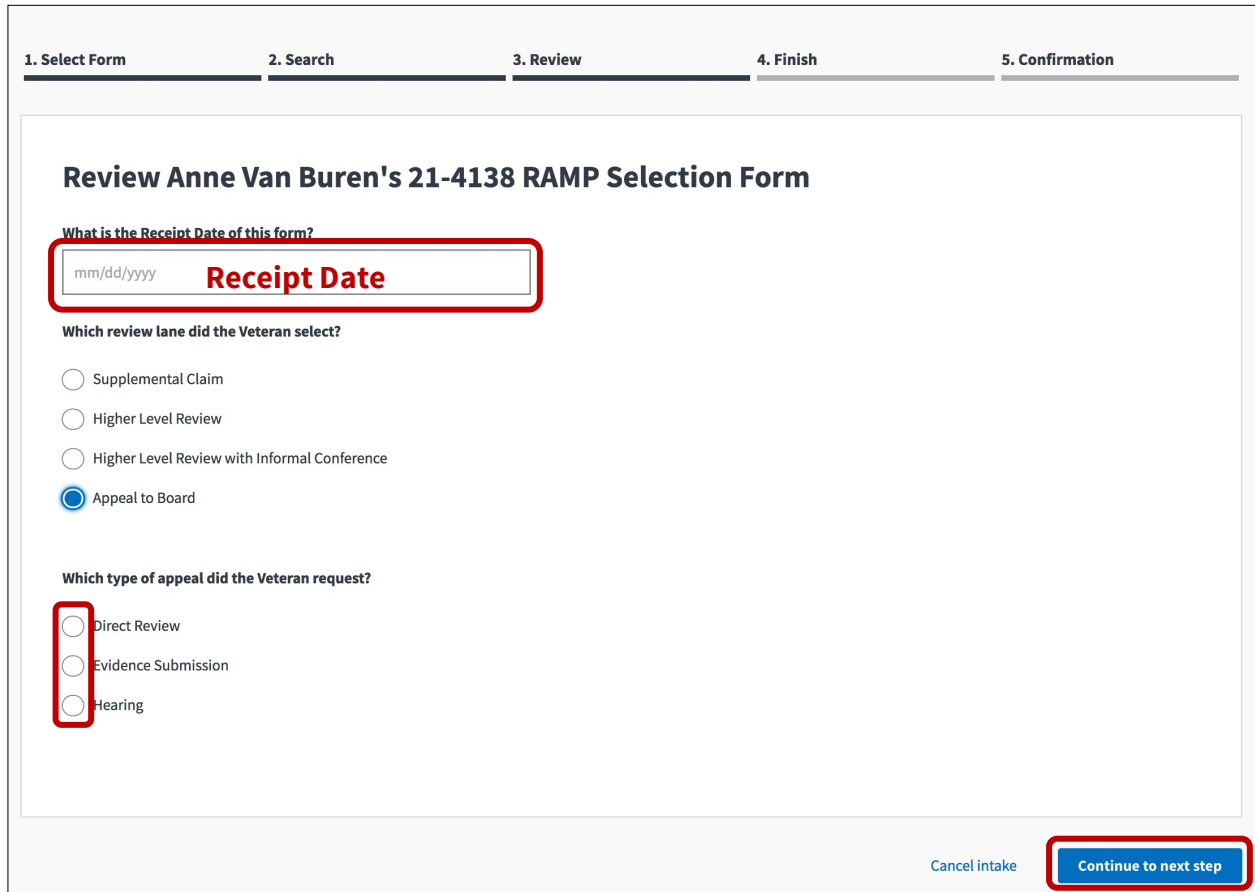
Review page (Appeal to Board requested)

NOTE: The "Appeal to Board" review lane will be tracked by Board employees only.

Review the Veteran's 21-4138 RAMP Selection Form in the Centralized Portal to verify that the Veteran has selected the "Appeal to Board" selection lane.

1. Input the Receipt Date of the Veteran's selection form.
2. Select the "Appeal to Board" review lane.

3. Select the type of appeal selected by the Veteran.
4. Click **Continue to next step** button to go to the next step.



1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Review Anne Van Buren's 21-4138 RAMP Selection Form

What is the Receipt Date of this form?

mm/dd/yyyy **Receipt Date**

Which review lane did the Veteran select?

☐ Supplemental Claim

☐ Higher Level Review

☐ Higher Level Review with Informal Conference

☒ Appeal to Board

Which type of appeal did the Veteran request?

☒ Direct Review

☐ Evidence Submission

☐ Hearing

Cancel intake **Continue to next step**

Type of Appeal options:

The **Direct Review** is a closed record review, similar to a HLR, but reviewed by BVA. No new evidence will be considered. The goal is to have a decision within one year.

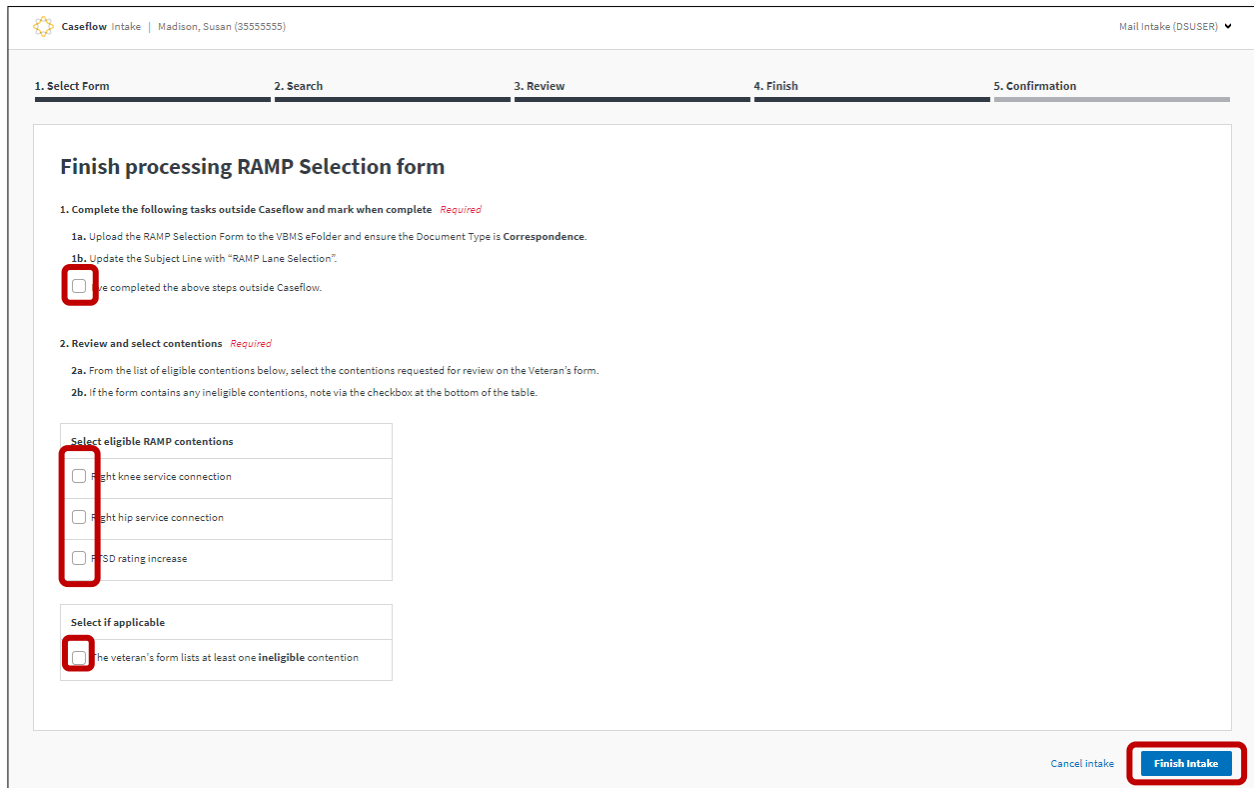
The **Evidence Submission** is a review including new evidence submitted by the Veteran. The new evidence must be submitted with the Notice of Disagreement (NOD) and/or within 90 days of the VA receiving the NOD. There is no goal set for the timeframe of a decision.

The **Hearing** is a face-to-face, or virtual, hearing of the Veteran's case which may include new evidence. The new evidence must be submitted at the hearing and/or within 90 days after the hearing. There is no goal set for the timeframe of a decision.

Finish page

The fourth step in the intake process requires you to complete a list of tasks outside of Caseflow Intake before proceeding to the next step.

1. Complete listed tasks in VBMS.
2. Click checkbox next to **I've completed the above steps outside Caseflow** to confirm completion of all tasks.
3. Review and select contentions that match the issues listed on the Veteran's RAMP Selection form. If the form contains any issues that cannot be reviewed under RAMP (e.g., a new issue that was not previously reviewed), select the ineligible checkbox in the lower table.
4. Click **Finish intake** button to continue to the next step.



Caseflow Intake | Madison, Susan (35555555) Mail Intake (DSUSER)

1. Select Form 2. Search 3. Review 4. Finish 5. Confirmation

Finish processing RAMP Selection form

1. Complete the following tasks outside Caseflow and mark when complete *Required*

1a. Upload the RAMP Selection Form to the VBMS eFolder and ensure the Document Type is *Correspondence*.

1b. Update the Subject Line with "RAMP Lane Selection".

☐ I've completed the above steps outside Caseflow.

2. Review and select contentions *Required*

2a. From the list of eligible contentions below, select the contentions requested for review on the Veteran's form.

2b. If the form contains any ineligible contentions, note via the checkbox at the bottom of the table.

Select eligible RAMP contentions
<input type="checkbox"/> Right knee service connection
<input type="checkbox"/> Right hip service connection
<input type="checkbox"/> PTSD rating increase

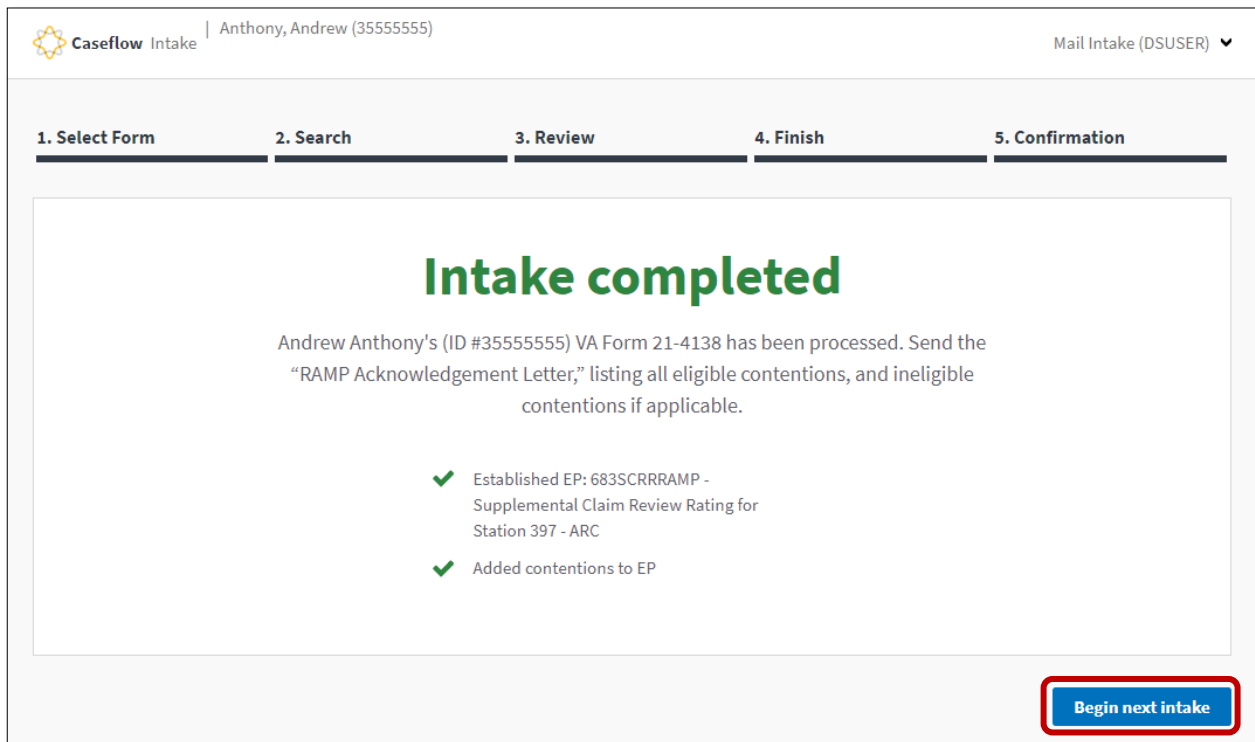
Select if applicable
<input type="checkbox"/> The veteran's form lists at least one <i>ineligible</i> contention

Cancel intake **Finish Intake**

Confirmation page

The **Confirmation** page, the final step in the Caseflow Intake process, confirms the completion of the Veteran's RAMP Selection. Caseflow will create an End Product (EP) in VBMS with the contentions you selected in the previous step. You are now ready to begin the next intake.

1. Review the Confirmation page for any additional instructions, if applicable.
2. Click **Begin next intake** to begin the next intake.

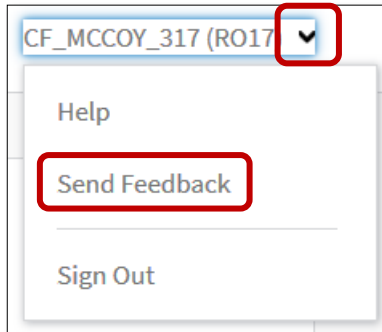


The screenshot shows the Caseflow Intake interface. At the top, the header includes the Caseflow Intake logo, the user name 'Anthony, Andrew (35555555)', and a 'Mail Intake (DSUSER)' dropdown menu. Below the header is a progress bar with five steps: '1. Select Form', '2. Search', '3. Review', '4. Finish', and '5. Confirmation'. The '5. Confirmation' step is currently active. The main content area displays 'Intake completed' in large green text. Below this, a message states: 'Andrew Anthony's (ID #35555555) VA Form 21-4138 has been processed. Send the "RAMP Acknowledgement Letter," listing all eligible contentions, and ineligible contentions if applicable.' Two green checkmarks indicate successful actions: 'Established EP: 683SCRRAMP - Supplemental Claim Review Rating for Station 397 - ARC' and 'Added contentions to EP'. In the bottom right corner, there is a blue button with a red border labeled 'Begin next intake'.

Sending Feedback

The **Send Feedback** link can be used to provide feedback or make a new feature request.

- 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.

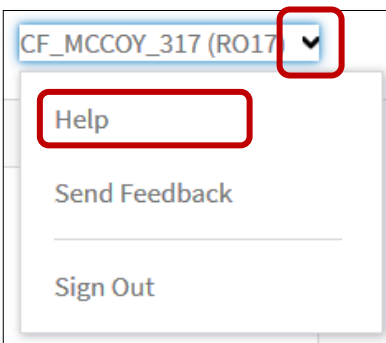


- Or, click the **Send Feedback** link located on the bottom right-hand side of any screen.



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.



Caseflow Status Page

The Caseflow Status Page provides the operational status for all Caseflow applications, from Reader to Queue, at a glance. To view the Caseflow Status Page, type, or copy and paste, the URL (<https://dsva.statuspage.io>) into your web browser and click [Enter] on your keyboard. You can stay abreast of the operational status of Caseflow applications by clicking the **Subscribe to Updates** button on the Caseflow Status Page.

Caseflow - Status page

SUBSCRIBE TO UPDATES

All Systems Operational

Refreshed about 1 minute ago

About This Site

Welcome to Caseflow's StatusPage.

If you're currently experiencing an issue with Caseflow and wish to reach out for service, you send us an email at caseflow@va.gov or 1-844-876-5548

Caseflow - Reader	Operational
Caseflow - Certification	Operational
Caseflow - Intake	Operational
Caseflow - Hearing Prep	Operational
Caseflow - Efolder Express	Operational
Caseflow - Dispatch	Operational
Caseflow - Queue	Operational

You can also access the Caseflow Status Page by clicking the **Track Caseflow Status** link located on the bottom right-hand corner of the page of any Caseflow application.

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Track Caseflow Status

Send feedback