



Department and Chapter Service Officer
Case Management System
User Reference Manual

Department and Chapter Service Officer – CMS User Reference Manual

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Logging into CMS

You can access the DAV CMS 4.0 at the following website. This is the live site, which all claims action ***must*** be taken through.

<https://cms.dav.org/Account/Login>

Username: Your email address

Password: Set up by NSO Office

For ***training purposes*** only, you can also access the CMS UAT environment at the following website:

<https://uatcms.dav.org>

Username: Your email address

Password: Set up by NSO Office

****Please note, the boarder is *RED in CMS UAT* and *Blue in CMS 4.0*, as seen in the following two pages.****

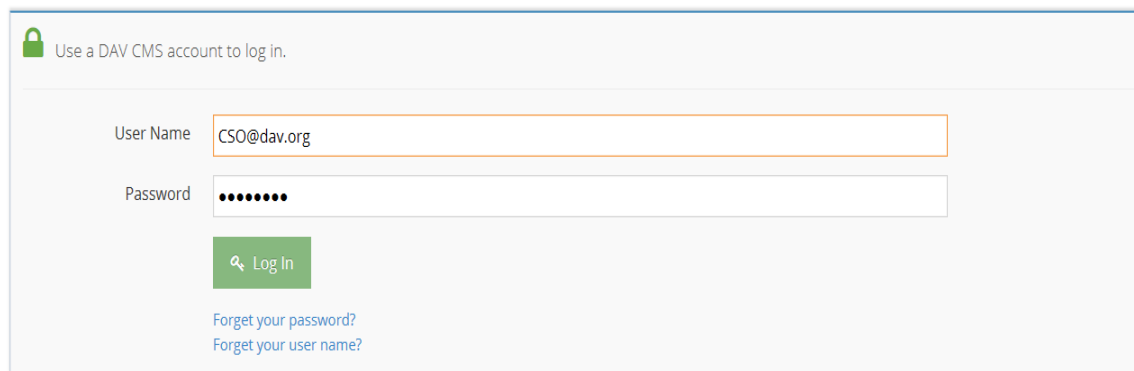
Logging into CMS for First Time

When the local National Service Office has created a user account, a temporary password will be provided.

Upon logging in for the first time, the DSO/CSO must update the account with the following.

- ✓ Set up a ***strong password***.
- ✓ Fill in the five security questions.

This is DAV CMS 4.0, which is the live site. All claims actions must be taken using this site.

A login form with a light gray background. At the top left is a green lock icon and the text 'Use a DAV CMS account to log in.' Below this are two input fields: 'User Name' containing 'CSO@dav.org' and 'Password' containing seven dots. Below the password field is a green 'Log In' button with a magnifying glass icon. At the bottom are two links: 'Forget your password?' and 'Forget your user name?'.

Use a DAV CMS account to log in.

User Name CSO@dav.org

Password •••••••

Log In

[Forget your password?](#)

[Forget your user name?](#)

For training purposes only, you can also access the CMS UAT environment



NSO Portal | Membership System | Employee Portal

Account Options

 Use a DAV CMS account to log in.

User Name

CSO@dav.org

Password

.....

 Log In

[Forget your password?](#)
[Forget your user name?](#)

Finding a Claimant

Upon logging into the system, a navigation bar will be seen on the top left. Upon selecting “Claimant”, then “Find Claimant”, a search for an individual **must always** be made with the below options to prevent creating duplicate claimants.

- ✓ Social Security or Claim Number
- ✓ First and Last Name
- ✓ Email Address
- ✓ Phone Number

The screenshot displays the DAV Case Management System interface. The top navigation bar is red and contains the DAV logo, "CASE MANAGEMENT SYSTEM", and links for "Resource Links", "NSO Portal", "Membership System", and "Employee Portal". On the right, there are dropdown menus for "Working on behalf of" (set to "Waco VA Regional Office") and "Outreach" (set to "Select Outreach"). Below the navigation bar, a blue bar shows the user is logged in as "Welcome, csohope@dav.org". A dropdown menu for "Claimant" is open, showing options for "Find Claimant" and "Add Claimant". Below this, the "Profile" section is visible. On the left, the "Search Criteria" panel includes input fields for "SSN" (with the value "995-99-7765"), "Claim Number", "Email", and "Phone Type". On the right, the search results table has columns for "First Name", "Last Name", "Date Of Birth", "City", "State", "Country", and "Veteran?". The table is currently empty, and a message at the bottom right states "0 results found!".

First Name	Last Name	Date Of Birth	City	State	Country	Veteran?
------------	-----------	---------------	------	-------	---------	----------

Clear Filter | Page 1 of 1 | 20 | 0 results found!

Adding a Claimant

To add a claimant select “Claimant”, then “Add Claimant”.

- ✓ Please note, before adding any claimant to CMS, a search **must always** be conducted to see if a record already exists.
- ✓ As shared previously, this can be completed by selecting “Find Claimant” then searching by first and last name, their social security and/or claim number, email address, and phone number.

By conducting a search, this avoids duplicate CMS records being created. CMS also provides a warning in most cases if a record matches another that already exists.

The screenshot displays the DAV Case Management System (CMS) interface. The top navigation bar is red and contains the DAV logo, the text "CASE MANAGEMENT SYSTEM", and links for "Resource Links", "NSO Portal", "Membership System", and "Employee Portal". On the right side of the navigation bar, there are two dropdown menus: "Working on behalf of" (set to "Waco VA Regional Office") and "Outreach" (set to "Select Outreach"). Below the navigation bar, there is a blue bar with a "Claimant" dropdown menu and a "Welcome, csohope@dav.org" message. A dropdown menu is open under "Claimant", showing "Find Claimant" and "Add Claimant". A blue arrow points to the "Add Claimant" option. Below the navigation bar, there is a "Profile" section. The main content area is divided into two sections. On the left, there is a "Search Criteria" section with a "Search Criteria" dropdown menu. Below it, there are input fields for "SSN" (containing "995-99-7765"), "Claim Number", "Email", and "Phone Type". On the right, there is a search results table with columns: "First Name", "Last Name", "Date Of Birth", "City", "State", "Country", and "Veteran?". The table is currently empty. Below the table, there is a "Clear Filter" button, a pagination control showing "Page 1 of 1", a "20" dropdown menu, and a red warning message: "0 results found!".

Adding a Claimant - Continued

Upon selecting “Add Claimant”, all information must be completed on the claimant. This includes first and last name, state, country, date of birth, and if available, their claim and social security number.

- ✓ The claim or social security number may be added by clicking on the slide bar seen below, which will access a different screen shown on the following page.
- ✓ All information required to be added are identified with red asterisks (*). Although some information isn’t required, every effort **must** be made to complete fully.
- ✓ Please note, when filling out, **do not** type in all caps. Example is “JUSTIN” versus “Justin” as a first name.

Create Claimant

Personal Information

Claim Number and SSN:



First Name *

Last Name *

State

Country

Date of Birth

Continue →

Adding a Claimant - Continued

This screen will appear upon the slide bar being selected.

- ✓ Although a claim or social security number isn't required, every effort **must** be made to include. If not available, do not select the slide bar.

Create Claimant

Personal Information

Claim Number and SSN:



Claim Number

SSN

Continue →

Adding a Claimant, Potential Existing Record Match

As shared earlier, CMS provides a warning in most cases if a record matches another that already exists. If this occurs, CMS provides a list of potential record matches as seen below.

- ✓ A review **must** be conducted of any potential matches listed that may be the claimant. Full claimant details may be viewed by selecting “View Full Details”.
- ✓ If confirmed the record is in fact the claimant being added, select “Use this Record” in the individual claimant record of potential matches.
- ✓ If no warning message is shown of a potential record match, continue adding all information.

The screenshot displays the DAV Case Management System interface. At the top, there is a red header bar with the DAV logo and navigation links: Resource Links, NSO Portal, Membership System, and Employee Portal. Below the header, a blue bar contains a search icon and a 'Create Claimant' button. The main content area is divided into two sections. On the left, the 'Personal Information' section is active, showing a form with fields for 'Claim Number' (123456789) and 'SSN'. A 'Cancel' button is at the bottom right of this section. On the right, a green warning box with a yellow triangle icon states 'We found potential Matches!' and asks 'How would you like to proceed?'. Below this, two options are listed: 'Continue without using any Matches' (with an orange arrow icon) and 'Select a match from the list below...' (with a green arrow icon). A blue arrow points to the 'Select a match from the list below...' option. Below the warning box, a section titled 'Potential Matches...' contains a table with the following data:

Status	Claimant
Name	Mr. Paul Blart Mallicop
Date of Birth	6/17/1979
City	n/a
State	n/a
Country	n/a

Below the table, there are two buttons: 'View Full Details' (with an information icon) and 'Use this record' (with a checkmark icon). A blue arrow points to the 'Use this record' button.

Recording a Phone Call or Interview

First, conduct a search of a claimant record by selecting “Find Claimant” then searching by first and last name, their social security and/or claim number, email address, or phone number. Upon conducting a search, a list of claimant records may be shown.

- ✓ Confirm the correct record of claimants shown by initially reviewing the first and last name, date of birth, state, country, and gender.
- ✓ Upon confirming, select “View” to access the intended claimants electronic record.

Please note, any communication with a claimant **must always** be recorded.

The screenshot displays the IDAV Case Management System interface. At the top, a red header bar contains navigation links: Resource Links, NSO Portal, Membership System, and Employee Portal. Below this, a blue bar shows the user's role as 'Claimant' and a welcome message for 'csohope@dav.org'. On the left, a sidebar menu lists various functions: Activities, Appeals, Dependents, Human Interest, POA (marked with a red 'x'), Rating Decision, Submittals, View All, General Request, POA Only (21-22), ITF (21-0966), Claims, Evidence Only, and Case History. The main content area is titled 'Profile » Paul Mallcop; 3456789; SS123456789; Email'. It features a 'Search Criteria' section with input fields for SSN (123-45-6789), Claim Number, Email, Phone Type, Foreign (checkbox), Phone, Prefix, and First Name. To the right, a table lists search results with columns: First Name, Last Name, Date Of Birth, City, State, Country, and Veteran?. The first result shows 'Paul Mallcop' with a date of birth of '6/17/1979'. A 'View | Details' link is present for this entry. Below the table, there is a 'Clear Filter' button and pagination information: 'Page 1 of 1' and 'View 1 - 1 of 1'. Blue arrows indicate the search process: one points to the search icon in the sidebar, another points to the search criteria input fields, and a third points to the 'View | Details' link in the results table.

First Name	Last Name	Date Of Birth	City	State	Country	Veteran?
Paul	Mallcop	6/17/1979				

1

1

Recording a Phone Call or Interview - Continued

Upon selecting “View”, the claimant record will be shown along with all information available.

- ✓ To record a phone call or interview, select “Communications”, then “View All”, then “Add New”.
- ✓ Upon selecting “Add New”, another page will be shown.

The screenshot displays the IDAV Case Management System interface. The top navigation bar includes links for Resource Links, NSO Portal, Membership System, and Employee Portal. A user login bar shows 'Welcome, cschope@dav.org'. On the right, there are dropdown menus for 'Working on behalf of' (Waco VA Regional Office) and 'Outreach' (Select Outreach).

The left sidebar contains a list of activities: Activities, Communications, View All, Notes, Files Reviewed, Appeals, Dependents, Human Interest, POA, Rating Decision, Submittals, and Case History. The 'Communications' menu item is highlighted with a blue arrow, and the 'View All' option is also highlighted with a blue arrow.

The main content area shows a breadcrumb trail: 'Communications » Paul Mallcop; 123456789; SS123456789;'. Below this, a table displays a record for Paul Mallcop with fields for DOB (6/17/1979), Address (n/a), Phone (n/a), and Special Cases (n/a). The Reference ID is 1597888. A blue arrow points to the 'Add New' button in the bottom right corner of the table.

At the bottom of the page, there is a filter bar with fields for Topic, Contact Type, Interview Type, and Date. The filter bar shows 'Page 1 of 1' and '20' results. A red warning icon indicates '0 results found!'.

Recording a Phone Call or Interview - Continued

Upon selecting “Add New”, the below page will be shown. Several type of communications will be shown to select from for recording an activity. Any communication with a claimant **must always** be recorded.

- ✓ Selectable Communication Type(s) include: Interview-In Person; Interview-Phone; Interview-other Video; Phone Call Requested; Email; Fax; and Other.
- ✓ Select the correct option applicable for the communication being recorded.
- ✓ If wanting an NSO to call the claimant within 48 hours, select “Phone Call Requested”.

Claimant Welcome, csohope@dav.org

Quick Actions: File Note Communication

Activities

Communications

View All

Notes

Files Reviewed

Appeals

Dependents

Human Interest

POA

Rating Decision

Submittals

Case History

Communications » Paul Mallcop; 123456789; SS123456789; Email

DOB 6/17/1989	Address n/a	Phone n/a	Special Cases n/a
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Reference ID
15978

Cancel

Save

Communication Type *

☐ Interview - In Person

☐ Interview - Phone

☐ Interview - Over Video

☐ Phone Call Requested

☐ Email

☐ Fax

☐ Other

Credit To

Files Reviewed

Topic *

Summary *

Cancel

Save

Recording a Phone Call or Interview - Continued

Upon selecting a Communication Type, the local NSO Supervisor **must** be selected from the “Credit To” drop down, and the following must be completed. Examples are shown below, and when preparing **do not** type in all caps.

- ✓ Fill in the “Topic” by providing a short summary of the action completed.
- ✓ At the end of the “Topic”, your position and first/last name must be added.
 - *Example: Discussed a potential claim for Migraines, submitted POA and ITF. DSO Jon Snow*
- ✓ Fill in the “Summary” for greater detail of items discussed with the claimant.
 - *Example: Type of evidence the claimant will be gathering and submitting later, issues filed for, etc.*
- ✓ If records were reviewed, check “File Reviewed”. Records may include service or medical records, etc.

Cancel ↺

Save ✓

Communication Type *

☒ Interview - In Person

☐ Interview - Phone

☐ Interview - Over Video

☐ Phone Call Requested

☐ Email

☐ Fax

☐ Other

Credit To

Jon Retzer

Files Reviewed

☐

Interview Type

VA

Topic *

Discussed Vietnam Service and Diabetes Type II

Summary *

Spoke with Veteran about his on ground service in Vietnam and his recent diagnosis of Type II diabetes. He has a Disability Questionnaire with him and no other conditions to claim. We will be presented a 526EZ, POA, and DBQ to NSO Office for submission, possibly as a DRC. Veteran was appreciative and sign up as a Full Life Member.

Cancel ↺

Save ✓

Preparing Scanned Documents for Electronic Submission

Create and save a file on your personal desktop, and label it as “Submittals”. In preparation of preparing documents for upload and submission in CMS, all information must be temporarily saved here.

- ✓ Documents may include VA Forms, such as the Power of Attorney, Intent to File for a Claim, Supplemental Claim, supporting evidence and documentation, etc.
 - Please note, all VA Forms ***must*** be downloaded directly from the Veterans Affairs website via <https://www.va.gov/find-forms/>.
- ✓ Upon all evidence and information being uploaded and submitted via CMS, all items ***must*** be deleted from the file, pursuant to policy.



Selecting a Submittal Type

Begin by selecting the “Submittals” tab on the left hand side. Several options will be shown. Upon selecting an option, another screen will be shown. *Please note, **do not use the “POA Only” option** as an Intent to File **must always** be submitted with a POA.*

- ✓ Select “ITF (21-0966)” when submitting a POA and Intent to File.
- ✓ Select “Claims” for submitting any new claim for benefits.
- ✓ Select “General Request” when submitting a supplemental claim or higher-level review.
- ✓ Select “Evidence Only” for submitting any type of supporting evidence or documentation for all pending.

The screenshot displays the VA benefits portal interface. On the left, a sidebar menu contains various navigation options: Activities, Appeals, Dependents, Human Interest, POA, Rating Decision, Submittals, View All, General Request, POA Only (21-22), ITF (21-0966), Claims, Evidence Only, and Case History. A blue arrow points to the 'Submittals' option, and another blue arrow points to the 'ITF (21-0966)' option. The main content area shows the 'Claimant Profile' for Paul Mallcop, with fields for SSN (123-45-6789) and Claim Number (SS 123456789). A green banner at the top indicates 'The Communication has been saved successfully.' Below this, there are tabs for 'Contact Info', 'Military Service', 'Disabilities', 'Conflict/War Record', 'Treatment Record', and 'Special Case'. The 'Contact Info' tab is active, showing fields for 'Is Veteran?' (checked), 'SSN', 'Verify SSN', 'Claim Number', and 'Prefix' (Mr.). The 'VETERAN' section is also visible, with fields for 'First Name' (Paul) and 'Middle Name' (Blart).

Preparing Intent to File Submittal

Begin by selecting the “Submittals” tab on the left hand side, then select ITF (21-0966). Upon selecting, the below screen will be shown and after completing the following steps, select “Review Submission” at the end.

- ✓ Please note, a Power of Attorney form and Intent to File **must** have already been completed, signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer. If the claimant has a DD Form 214, include this with one of the scanned documents as well.
- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.

The screenshot displays the VA Submittals system interface. On the left, a sidebar contains navigation tabs: Activities, Appeals, Dependents, Human Interest, POA (checked), Rating Decision, and Submittals (selected). Below Submittals are links for View All, General Request, POA Only (21-22), ITF (21-0966) (selected), Claims, Evidence Only, and Case History. The top header shows 'Quick Actions: File, Note, Communication' and 'Submission Contact Info » CSO Hope; 123456789; SS123456789; Email'. The main form area is titled 'Intent To File' and includes fields for Type (Intent To File), Method (Print), Include POA? (checked), Source (CSO), Source Name (CSO Hope), Send to VA Section (Department of Veterans Affairs (VA)), ITF Effective Date, Days Left, and Credit To (No ITF on file). Below the form is a section titled 'VA Forms: 21-0966' containing a list of forms with checkboxes. The first two forms are checked: '21-22 Power of Attorney' and '21-0966 Intent to File'. Other forms include '21-526EZ Compensation Claim', '21-686C Declaration of Status of Dependents*', '21-74 Request for Approval of School Attendance*', '21-8940 Veteran's Increased Compensation Based on Unemployability*', '21-4192 Request for Employment Information in Connection with Claim for Disability*', '21-0781 Statement in Support of Claim for Service Connection for PTSD*', '21-0781a Statement in Support of Claim for Service Connection for PTSD Secondary to Personal Assault*', '26-4555 Veterans Application in Acquiring Specially Adapted Housing or Special Home Adaptation Grant Under Title 38 U.S.C. 2101(a) or (b)*', '21-4502 Automobile or Other Conveyance and Adaptive Equipment Under 38 U.S.C. 3901-3904*', '21-2680 Exam for Housebound Status or Permanent Need for Regular A&A*', '21-0779 Req. for Nursing Home Info. in Connect. with Claim for A&A*', '21-527EZ Pension Claim*', '10-8578 Annual Clothing Allowance*', '21-4140 Employment Questionnaire*', '21-4142 Authorization to Disclose Information to the VA*', '28-1900 Disabled Veterans Vocational Rehabilitation*', '22-0848 Rural Relocation Benefit*', '22-5490 Survivors and Dependents Educational Assistance*', '10-10 Domiciliary Applications*', '10-10EZ Enrollment Application For Health Benefits*', '10-10D Application for CHAMPVA Benefits*', '10-2570D Dental Record Authorization and Invoice for Outpatient Service*', '10-1394 Adaptive Equip - Motor Vehicle*', '10-0103 Assistance In Acquiring Home Improvement and Structural Alterations*', '29-4364 Service-Disabled Veterans Insurance*', '26-1880 Request for A Certificate of Eligibility*', '26-0286 Loan Summary Sheet*', and 'Earlier Effective Date*'. Blue arrows point to the 'Submittals' tab, the 'Include POA?' checkbox, the 'Source' dropdown, the 'Source Name' dropdown, the 'Credit To' dropdown, and the 'ITF (21-0966)' link in the sidebar.

Preparing Intent to File Submittal - Continued

Select “Form Upload” on the top, then “Remove” to delete the auto drafted POA and Intent to File forms. Both auto drafted documents **must** be removed.

- ✓ Select the “Attach Claim” for each, then upload the Power of Attorney and Intent to File forms previously completed, already signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ After uploading each of the documents, confirm they have been added.
- ✓ Select “Review Submission”.

VA Forms: 21-22, 21-0966

Contact Info	Homeless	Veteran Info	Evidence	POA	ITF	Form Upload	Correspondence	Signatures
--------------	----------	--------------	----------	-----	-----	-------------	----------------	------------

Cancel  Save  Continue 

For each form below, to upload a PDF, click the "Attach Claim" button. Highlighted forms indicate that the form can be generated electronically. However you can choose to replace these by manually uploading a PDF instead.

21-22 - Power of Attorney

Attach Claim 

21-0966 - Intent to File   Preview 

 21-0966.20250519132501993.pdf  Remove

This file was automatically generated on 5/19/2025 at 1:25:02 PM using information provided on this submission. To replace it, click "Remove", then attach a claim PDF. To re-generate a new version, click "Remove", then Save without attaching a new PDF.

Cancel  Save  Continue 

Delete Submittal Review Submission 

Preparing Intent to File Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown. Confirm the POA and ITF documents upload was successful on the screen.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ Upon selecting, all information will be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

VA Forms: 21-22, 21-0966

Contact Info Veteran Info POA ITF Form Upload Correspondence Signatures Submit

Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 496975
- **Status:** In Progress
- **Claimant:** Mr. Paul Blart Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Attachment(s):**
- **Form(s):**
 - [21-22 Power of Attorney](#)
 - [21-0966 Intent to File](#)
- **# Claims Filed:** 0
- **Submittal Letter:** Included

Send For Review - All Paper Uploaded

Send For Review - Paper Mailed/Faxed to Office

Cancel Delete Submittal Save

Preparing Claims Submittal

Begin by selecting the “Submittals” tab on the left hand side, then “Claims”. Upon selecting, the below screen will be shown and after completing the following steps, select “Review Submission” at the end.

- ✓ Please note, a Power of Attorney along with all other forms and evidence must have already been completed, signed by the claimant, and scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.
- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to any of the VA Forms listed that’s been prepared, and if the form is not shown, click a check mark next to “Form Not Listed” at the right bottom.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.

The screenshot shows the 'Claims' submittal form. On the left is a sidebar with a menu where 'Submittals' is selected. The main form area has a top section for 'Submission Contact Info' and a 'Type' dropdown set to 'Claims'. Below this, the 'Method' is 'Direct Mail Up' and the 'Include POA?' checkbox is checked. A 'Status' dropdown is set to 'In Progress'. The 'Source' field is empty, and the 'Source Name' dropdown shows 'Must Choose Source...'. The 'Send to VA Section' dropdown is set to 'Department of Veterans Affairs (VA)'. The 'Credit To' dropdown is set to 'Justin Hart'. The 'ITF Effective Date' field is empty, and the 'No ITF on file' checkbox is checked. Below this is a section titled 'VA Forms: 21-22' containing a list of checkboxes for various forms. A list of VA forms is displayed, including '21-22 Power of Attorney', '21-0966 Intent to File', '21-526EZ BDD Claim', '21-526EZ FDC Claim', '21-526EZ IDES Claim', '21-526EZ Standard Claim', '21-686C Declaration of Status of Dependents*', '20-0995 Supplemental Claim*', '20-0996 Higher-Level Review*', '21-674 Request for Approval of School Attendance*', '21-8940 Veteran's Increased Compensation Based on Unemployability*', '21-4192 Request for Employment Information in Connection with Claim for Disability*', '21-0781 Statement in Support of Claim for Service Connection for PTSD*', '21-0781a Statement in Support of Claim for Service Connection for PTSD Secondary to Personal Assault*', '21-530 Burial Benefits*', '21-0304 Spina Bifida Benefits*', '21-4140 Employment Questionnaire*', '21-4142 Authorization to Disclose Information to the VA*', '28-1900 Disabled Veterans Vocational Rehabilitation*', '22-0848 Rural Relocation Benefit*', '22-5490 Survivors and Dependents Educational Assistance*', '10-10 Domiciliary Applications*', '10-10EZ Enrollment Application For Health Benefits*', '10-10D Application for CHAMPVA Benefits*', '10-2570D Dental Record Authorization and Invoice for Outpatient Service*', '10-1394 Adaptive Equip - Motor Vehicle*', '10-0103 Assistance in Acquiring Home Improvement and Structural Alterations*', '29-4364 Service-Disabled Veterans Insurance*', and '26-1880 Request for A Certificate of Eligibility*'. Blue arrows point to the 'Include POA?' checkbox, the 'Source' field, the 'Source Name' dropdown, the 'Credit To' dropdown, the 'No ITF on file' checkbox, and the 'VA Forms' list.

Preparing Claims Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Select the “Disability & Treatment” tab, then select “Add New Disability” and add each issue being claimed for entitlement.
- ✓ Select either “New” for a new condition, or “Increase” if claiming an increase with a current service connected condition.
- ✓ Within the “Disability” drop down, add each issue being claimed along with the others, if applicable. If the disability is not found within the drop down selection, just type out the claimed condition.
- ✓ Select “Review Submission” after completing.

Cancel

Save Continue

This is an initial application for compensation or pension benefits ☐ NO

Disability Entitlements

Add New Disability

☒ New ☐ Increase	Disability: * 8100 - Migraine	Explain how disability relates to in-service event/exposure/injury: 	If due to exposure, event, or injury please specify:
☒ New ☐ Increase	Disability: * hair loss	Explain how disability relates to in-service event/exposure/injury: 	If due to exposure, event, or injury please specify:
☒ New ☐ Increase	Disability: * 7828 - Acne	Explain how disability relates to in-service event/exposure/injury: 	If due to exposure, event, or injury please specify:

Preparing Claims Submittal - Continued

Select “Form Upload” on the top, then “Remove” for any auto drafted VA forms to delete. All auto drafted documents ***must*** be removed.

- ✓ Select the “Attach Claim” for each, then upload all VA forms previously completed, already signed by the claimant, and scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ After uploading each of the documents, confirm they have been added.
- ✓ Select “Review Submission”.

The screenshot shows a web interface for preparing a claims submittal. At the top is a horizontal menu with tabs: Contact Info, Homeless, Veteran Info, Disability & Treatment, Evidence, Service Record, Service Pay, Direct Deposit, POA, **Form Upload**, Correspondence, and Signatures. The 'Form Upload' tab is active. Below the menu, there are 'Cancel' and 'Save' buttons. A text instruction reads: 'For each form below, to upload a PDF, click the "Attach Claim" button. Highlighted forms indicate that the form can be generated electronically. However you can choose to replace these by manually uploading a PDF instead.' The main area lists three forms: '21-22 - Power of Attorney', '21-526EZ - Standard Claim', and '- Form Not Listed*'. The first two forms are highlighted in yellow. The '21-22 - Power of Attorney' form shows a PDF file '21-22.20250519161648385.pdf' with a 'Remove' button. The '21-526EZ - Standard Claim' and '- Form Not Listed*' forms each have an 'Attach Claim' button. At the bottom, there are 'Delete Submittal', 'Save', 'Continue', and 'Review Submission' buttons. Blue arrows indicate the workflow: an arrow points to the 'Form Upload' tab; an arrow points to the 'Remove' button for the first form; an arrow points to the 'Attach Claim' button for the second form; an arrow points to the 'Attach Claim' button for the third form; and a large arrow points down to the 'Review Submission' button.

Preparing Claims Submittal - Continued

If applicable, select the “Evidence” tab on the top and the following screen will be shown. Please note, all supporting evidence and documentation must already be scanned and saved to the “Submittals” folder on the computer.

- ✓ Select “Add Evidence With Attachment” for each and all supporting documentation.
- ✓ Fill in the “What type of evidence is this?” and “With which claim(s) is the evidence associated”. After uploading each of the documents, confirm all have been added from your “Submittals” folder.
- ✓ Select “Review Submission”.

Preparing Claims Submittal - Continued

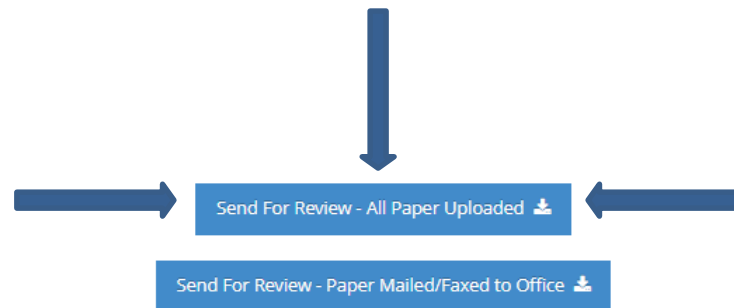
Upon selecting “Review Submission”, the following page will be shown. Confirm all disabilities claimed, attachments, and etc., are shown and listed.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ Upon selecting, all information will be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646456
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Disabilities Claimed:**
 - N 7828 - Acne
 - N hair loss
 - N 9411 - Mental disorders: Anxiety disorders: Posttraumatic stress disorder
- **Attachment(s):**
 - [Boarding Pass - Print your boarding pass - American Airlines.pdf](#) - Airline Boarding Pass for Baghdad, Iraq
 - [Katherine Summer Camp.pdf](#) - Registration for Summer Camp
- **Form(s):**
 - [21-22 Power of Attorney](#)
 - 21-526EZ Standard Claim
 - Form Not Listed*
- **# Claims Filed:** 2
- **# Conditions Filed:** 3
 - New Service Connection(s): 3
 - New Increase(s): 0
 - New Secondary Condition(s): 0
- **Submittal Letter:** Included



Cancel ↺

Delete Submittal

Save ✓

Preparing Supplemental Claim or Higher-Level Review Submittal

Upon selecting “General Request” from the options listed, the following screen will be shown. Please note, a Power of Attorney form, and supplemental or higher level review form must have already been completed, signed, and scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.

- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to either supplemental claim, or higher-level review.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.
- ✓ Select “Review Submission” at the bottom right of the screen.

Quick Actions: [File](#) [Note](#) [Communication](#)

Activities
Dependents
General Attachment
Human Interest
POA ☒
Rating Decision
Submittals

Submission Contact Info » Paul Mallcop; 989827530; XCSS989827530; supercop911@aol.com;

Type: **General Request**

Status: **In Progress**

ITF Effective Date

Method: **Print** ☐ Include POA?

Source: **CSO**

Source Name: **Test Source**

Send to VA Section: **Department of Veterans Affairs (VA)**

Days Left: **No ITF on file**

Credit To:

Files Reviewed: ☐

VA Forms

- ☐ 21-22 Power of Attorney
- ☐ 21-0966 Intent to File
- ☐ 21-526EZ BDD Claim
- ☐ 21-526EZ FDC Claim
- ☐ 21-526EZ IDES Claim
- ☐ 21-526EZ Standard Claim
- ☐ 21-686C Declaration of Status of Dependents*
- ☐ 20-0995 Supplemental Claim*
- ☐ 21-530 Burial Benefits*
- ☐ 21-0304 Spina Bifida Benefits*
- ☐ 21-4140 Employment Questionnaire*
- ☐ 21-4142 Authorization to Disclose Information to the VA*
- ☐ 28-1900 Disabled Veterans Vocational Rehabilitation*
- ☐ 22-0848 Rural Relocation Benefit*
- ☐ 22-5490 Survivors and Dependents Educational Assistance*
- ☐ 10-10 Domiciliary Applications*

Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Select the “Disability Claimed” tab, then select “Add New Disability” and add each issue being claimed for entitlement.
- ✓ Select either “New” for a new condition, “Increase” if claiming an increase with a current service connected condition, or “Secondary” if claiming a condition caused by a service connected condition.
- ✓ Within the “Disability” drop down, add each issue being claimed along with the others, if applicable. If the disability is not found within the drop down selection, just type out the claimed condition.
- ✓ Select “Review Submission” after completing.

The screenshot shows the 'Disabilities Claimed' tab in the VA system. At the top, there are tabs for 'Contact Info', 'Veteran Info', 'Disabilities Claimed', and 'Evidence'. A blue arrow points to the 'Disabilities Claimed' tab. Below the tabs, there are 'Cancel', 'Save', and 'Continue' buttons. A toggle switch indicates 'This is an initial application for compensation or pension benefits' with a 'NO' selection. The main section is titled 'Disability Entitlements' and contains an 'Add New Disability' button. Below this, there are two identical forms for adding a new disability. Each form has three radio buttons: 'New' (selected), 'Increase', and 'Secondary'. To the right of the radio buttons is a 'Disability:' dropdown menu. A blue arrow points to the first dropdown menu. To the right of the dropdown menu is a text box labeled 'If due to exposure, event, or injury please specify:'. A blue arrow points to this text box. At the bottom of the form, there are 'Cancel', 'Save', and 'Continue' buttons. A blue arrow points to the 'Continue' button. Below the form, there is a red 'Delete Submittal' button and a blue 'Review Submission' button with a download icon. A blue arrow points to the 'Review Submission' button.

Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

After selecting “Review Submission”, select the “Evidence” tab, then the following screen will be shown.

- ✓ Select “Add Evidence with Attachment”, then add the scan/saved supplemental claim or higher-level review forms from your “Submittals” folder on your computer.
- ✓ Continue selecting “Add Evidence with Attachment” for all others when applicable, and upload the Power of Attorney along with any other supporting evidence or documentation, which is scanned/saved as **separate** PDF documents to your “Submittals” folder on your computer.
- ✓ Select “Review Submission”.

VA Forms: 20-0996

Contact Info Veteran Info Disabilities Claimed Evidence

Cancel Save Continue

Submission Evidence

Add Evidence With Attachment Add Evidence (No Attachment)

VA Form 20-0996.pdf Remove Download Preview

What type of evidence is this? *

VA Form 20-0996

With which claim(s) is this evidence associated?

☒ 20-0996 Higher-Level Review*

Cancel Save Continue

Delete Submittal Review Submission

Preparing Supplemental Claim or Higher-Level Review Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Confirm all disabilities claimed, attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ All information will then be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs. Affairs.

VA Forms: 21-22, 20-0996

Contact Info	Veteran Info	Disabilities Claimed	Evidence	POA	Correspondence	Submit
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Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646465
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Disabilities Claimed:**
 - N 7828 - Acne
 - N 7908 - Acromegaly
- **Attachment(s):**
 - [VA Form 20-0996.pdf](#) - VA Form 20-0996
- **Form(s):**
 - 20-0996 Higher-Level Review*
 - [21-22 Power of Attorney](#)
- **# Claims Filed:** 1
- **# Conditions Filed:** 2
 - New Service Connection(s): 2
 - New Increase(s): 0
 - New Secondary Condition(s): 0
- **Submittal Letter:** Included

The diagram illustrates the navigation flow on the Submission Confirmation Page. Blue arrows point from the left to the following items in the list: 'VA Form 20-0996.pdf - VA Form 20-0996', '21-22 Power of Attorney', and 'New Service Connection(s): 2'. A large blue arrow points down from the list area to the 'Send For Review - All Paper Uploaded' button. Two horizontal blue arrows point towards this button from the left and right. Below it, another button 'Send For Review - Paper Mailed/Faxed to Office' is shown.

Send For Review - All Paper Uploaded

Send For Review - Paper Mailed/Faxed to Office

Preparing Evidence Only Submittal

Upon selecting “Evidence Only” from the options listed, the following screen will be shown. Please note, a Power of Attorney form, along with all supporting evidence and documentation should be scanned as separate PDF documents to your “Submittals” folder on your computer.

- ✓ Click a check mark next to the “Method” option that says “Include POA?”. The VA Forms section will automatically update.
- ✓ Click a check mark next to either supplemental claim, or higher-level review.
- ✓ Select the local NSO Supervisor from the “Credit To” drop down where the submission will be sent, then ensure the “Source” is shown as your position (CSO, or DSO), and “Source Name” indicates your name.
- ✓ Select “Review Submission” at the bottom right of the screen.

Submission Contact Info » Paul Mallcop; 989827530; XCSS989827530; supercop911@aol.com; !

Type: **Evidence Only**

Method: Print ☒ Include POA?

Status: In Progress

Source: CSO

Source Name: Test Source

Send to VA Section *: Department of Veterans Affairs (VA)

ITF Effective Date: Days Left: No ITF on file

Credit To: [Empty Field]

Files Reviewed: ☐

VA Forms

- ☒ 21-22 Power of Attorney
- ☐ 21-0966 Intent to File
- ☐ 21-526EZ BDD Claim
- ☐ 21-526EZ FDC Claim
- ☐ 21-526EZ IDES Claim
- ☐ 21-526EZ Standard Claim
- ☐ 21-686C Declaration of Status of Dependents*
- ☐ 20-0995 Supplemental Claim*
- ☐ 20-0996 Higher-Level Review*
- ☐ 21-530 Burial Benefits*
- ☐ 21-0304 Spina Bifida Benefits*
- ☐ 21-4140 Employment Questionnaire*
- ☐ 21-4142 Authorization to Disclose Information to the VA*
- ☐ 28-1900 Disabled Veterans Vocational Rehabilitation*
- ☐ 22-0848 Rural Relocation Benefit*
- ☐ 22-5490 Survivors and Dependents Educational Assistance*
- ☐ 10-10 Domiciliary Applications*
- ☐ 10-10EZ Enrollment Application For Health Benefits*

Left Sidebar: Activities, Dependents, General Attachment, Human Interest, POA, Rating Decision, Submittals (selected), View All, General Request, POA Only (21-22), ITF (21-0966), Claims, Evidence Only, Case History

Preparing Evidence Only Submittal - Continued

After selecting “Review Submission”, select the “Evidence” tab, then the following screen will be shown.

- ✓ Select “Add Evidence with Attachment”, then add the scan/saved POA form from your “Submittals” folder on your computer.
- ✓ Continue selecting “Add Evidence with Attachment” for all others when applicable, and upload any other supporting evidence or documentation, which is scanned/saved as separate PDF documents to your “Submittals” folder on your computer.
- ✓ Select “Review Submission”.

The screenshot displays the 'Evidence' tab within the 'VA Forms: 21-22' interface. At the top, there are tabs for 'Contact Info', 'Veteran Info', 'Evidence', and 'Signatures'. The 'Evidence' tab is active, indicated by a blue arrow pointing to it. Below the tabs, there are two main sections. The first section contains a 'Cancel' button and 'Save' and 'Continue' buttons. The second section, titled 'Submission Evidence', contains two buttons: 'Add Evidence With Attachment' and 'Add Evidence (No Attachment)'. A blue arrow points to the 'Add Evidence With Attachment' button. Below this section, there is another 'Cancel' button and 'Save' and 'Continue' buttons. At the bottom left, there is a red 'Delete Submittal' button. At the bottom right, there is a blue 'Review Submission' button. A blue arrow points down to the 'Review Submission' button.

Preparing Evidence Only Submittal - Continued

Upon selecting “Review Submission”, the following page will be shown.

- ✓ Confirm all attachments, and etc., are shown and listed by clicking on.
- ✓ Select “Send for Review – All Paper Uploaded”.
- ✓ All information will then be shared immediately with the National Service Office for final review and submission to the Department of Veterans Affairs.

VA Forms: 21-22

Contact Info Veteran Info Evidence POA Correspondence Signatures Submit

Submission Confirmation Page

Please verify the summary below, then click one of the buttons below. You can also go back to a previous section and make any changes necessary.

- **Submission #:** 2646468
- **Status:** In Progress
- **Claimant:** Mr. Paul Mallcop
- **To:** Department of Veterans Affairs (VA)
- **Attachment(s):**
- **Form(s):**
 - 21-22 Power of Attorney
- **# Claims Filed:** 0
- **Submittal Letter:** Included

Send For Review - All Paper Uploaded

Send For Review - Paper Mailed/Faxed to Office

Cancel Delete Submittal Save

Special Case Notifications

In certain special cases or circumstances, it's important to note and identify within a claimants record to ensure the national service office is made aware of. Some examples of special circumstances may include but are not limited to the following.

- ✓ Homelessness, such as the veteran losing their home due to a fire, and etc.
- ✓ Financial Hardship
- ✓ Terminal conditions, such as lung cancer, multiple sclerosis, and etc.
- ✓ Currently living in another country, email is the best method of communication.

To add a “Special Case”, click on the silhouette on the top left of the screen of a claimants record, then click on “Add Special Case Record”, and the below page will be shown. Select a “Case Type”, then add notes for each and save. **Do not** type in all caps.

The screenshot shows the 'Special Case' form for a claimant named Paul Mallcop. The form is titled 'Special Case Record' and has a 'Cancel' button at the top left. A blue arrow points to the 'Add Special Case Record' button. The form has a 'Case Type' dropdown menu with 'Homeless' selected. Below this is a 'Notes' text area containing the text: 'Veteran recently lost home due to fire. Need to request to expedite.' A blue arrow points to the 'Special Case' tab. At the bottom right, there is a 'Save' button with a green checkmark. A blue arrow points to the 'Save' button.

Quick Actions: File Note Communication

Claimant Profile » Paul Mallcop; 123456789; SS123456789;

Contact Info Military Service Disabilities Conflict/War Record Treatment Record Special Case

Cancel

Add Special Case Record

Special Case Record Remove

Case Type * Homeless

Notes Veteran recently lost home due to fire. Need to request to expedite.

Cancel

Save

Important Reminders

- ✓ All **VA Forms must be downloaded** directly from the Veterans Affairs website via <https://www.va.gov/find-forms/>.
- ✓ **Do not** use the auto generated VA forms in CMS, as they are not the most recent.
- ✓ Sometimes while submitting a claim the POA indicator will be a red X. This will need to be a green check or the POA included box checked on your submittal
- ✓ Always **search for existing claimants in CMS**, ensuring not to create a duplicate record. CMS will also help by sharing a warning one exists.
- ✓ **Ensure each disability being claimed is added for claims submittals**. Indicate specifically what is being claimed such as new, secondary or increase.
- ✓ **Do not** upload the DAV contact brief.
- ✓ **Do not** type in all caps. An example is “JON SNOW” versus “Jon Snow”.
- ✓ Ensure interviews and phone calls are **kept** on all client interactions. This will ensure thorough communication between yourself and the local national service office.
- ✓ **Do not** create two or more separate submittals in the same interview.
- ✓ Always ensure clients **contact information**, such as email, mailing address, and phone numbers are up to date with each client interactions.
- ✓ Upon all evidence and information being uploaded and submitted via CMS, all items **must be deleted** from the “Submittals” file on your computer, pursuant to policy.

Any questions or concerns with CMS, please contact the local National Service Office .