

# INTAKE

## FOR COMPENSATION & PENSION



DIGITAL SERVICE at VA

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# Intake Caseflow

Caseflow Intake (Intake) is a web-based application designed to support the Appeals Modernization Act (AMA). It will process AMA appeals for Veterans who have chosen the new Supplemental Claim (SC) or Higher-Level Review (HLR) options as well as those who have chosen to appeal directly to the Board through a Notice of Disagreement (NOD). Intake will serve as the single data input system for this process, providing a source of truth for AMA statutory metrics. Across the board, Intake performs numerous issue-level validations, matching, and error checking, to capture the best possible data and reduce processing overhead.

# Forms compatible with Caseflow Intake:

- VA Form 20-0996 Request for Higher Level Review
- VA Form 20-0995 Supplemental Claim Application
- VA Form 10182 Notice of Disagreement
- VA Form 21-4183 Statement In Support of Claim (RAMP)
- RAMP Opt-In Election Form

# INTAKE ACCESS



## **Browser preference**

Latest version of Google Chrome  
and Internet Explorer are  
recommended for Caseflow Intake

# Requesting Access to Caseflow Intake

If you or your team needs access to Caseflow Intake, please contact Martina Jones: [martina.jones@va.gov](mailto:martina.jones@va.gov)

# Access to Caseflow Intake

- Connect to the VA network
- Open your web browser
- Enter the URL <https://appeals.cf.ds.va.gov/intake>
- Sign in using your VA credentials
- You will then be taken to the Caseflow Intake Welcome page



INTAKING A FORM

Select Form

## Step 1: Select Form

After you receive the AMA form or Notice of Disagreement, the first step in the intake process is to Select Form. Select the desired form from the “Which form are you processing?” dropdown menu.

# Step 1: Select Form

Caseflow > Intake

[Search cases](#) BVAOFRANECKI (VACO) ▼

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

## Welcome to Caseflow Intake!

Which form are you processing?

Enter or select form

Continue to search

Built with ❤ by the Digital Service at VA

[Track Caseflow Status](#) | [Send feedback](#)


INTAKING A FORM

Search

A decorative graphic in the bottom right corner of the slide, consisting of a light blue rounded square partially overlapping a white background.

## Step 2: Search

- Type in the Veteran ID or SSN of the Veteran.
- Even if the claimant is someone other than the Veteran, please search for the Veteran whose benefits are under appeal.

 **Department of Veterans Affairs**

**DECISION REVIEW REQUEST: SUPPLEMENTAL CLAIM**

INSTRUCTIONS: PLEASE READ THE PRIVACY ACT NOTICE AND RESPONDENT BURDEN INFORMATION ON PAGE 2 BEFORE COMPLETING THIS FORM.

**PART I - CLAIMANT'S IDENTIFYING INFORMATION**

NOTE: You can either complete the form online or by hand. If completed by hand, print the information requested in form.

1. VETERAN'S NAME (First, Middle Initial, Last)

2. VETERAN'S SOCIAL SECURITY NUMBER

3. VA FILE NUMBER (If applicable)

4. VETERAN'S SERVICE NUMBER (If applicable)


5. INSURANCE POLICY NUMBER (If applicable)

6. CLAIMANT'S NAME (First, Middle Initial, Last) (If other than veteran)

7. CLAIMANT TYPE:

☐ VETERAN ☐ VETERAN'S SPOUSE ☐ VETERAN'S CHILD ☐ VETERAN'S PARENT

8. CURRENT MAILING ADDRESS (Number, street or rural route, City or P.O. Box, State and ZIP Code and Country)

 **Caseflow > Intake**

1. Select Form      2. Search      3. Review

**Search for Veteran by ID**

Enter the Veteran's ID or SSN

# Veteran ID Errors

There are several errors which you may encounter while searching.

Examples:

- **Invalid file number: Veteran ID not found.** Please enter a valid Veteran ID and try again.
- **Veteran not accessible: You don't have permission to view this Veteran's information.** It looks like you do not have the necessary level of access to view this information. Please alert your manager for further action.
- **Veteran not valid:** The Veteran's profile has missing or invalid information required to perform intake.
- **Duplicate intake in progress: Already started processing this form.** Another user has begun intake on this file. Please confirm they will complete this intake, then move on to the next mail item.
- **Something went wrong. Please try again.** This is a system error. If the problem persists, please contact Caseflow support.

INTAKING A FORM

Review

# Step 3: Review

12. BENEFIT TYPE: **PLEASE CHECK ONLY ONE** (If you would like to file for multiple benefit types, you must complete a separate request form for each benefit type.)

☐ COMPENSATION    ☐ PENSION/SURVIVORS BENEFITS    ☐ FIDUCIARY    ☐ EDUCATION    ☐ VETERANS HEALTH ADMINISTRATION  
☐ VOCATIONAL REHABILITATION AND EMPLOYMENT    ☐ LOAN GUARANTY    ☐ INSURANCE    ☐ NATIONAL CEMETERY ADMINISTRATION

**PART II - HIGHER-LEVEL REVIEW OPTIONS**

13. IF YOU WOULD LIKE THE SAME OFFICE THAT ISSUED YOUR PRIOR DECISION TO CONDUCT THE REVIEW, YOU CAN MAKE THAT REQUEST BY CHECKING THE BOX BELOW. IF YOU DO NOT CHECK THE BOX, VA WILL TAKE THAT AS A REQUEST TO HAVE A DIFFERENT OFFICE CONDUCT THE REVIEW. (Please note VA may be unable to grant your request.)

☐ If available, I would like **HIGHER-LEVEL REVIEW** conducted at the same office within the agency of original jurisdiction.

14. IN ADDITION, YOU OR YOUR AUTHORIZED REPRESENTATIVE MAY REQUEST AN INFORMAL CONFERENCE WITH THE HIGHER-LEVEL REVIEWER. (This is a telephonic communication with the higher level reviewer for the sole purpose of pointing out errors of fact or law in the prior decision. VA will only conduct one informal conference associated with this request for higher-level review. Check the box below to request an informal conference.)

☐ I, or my representative, would like an informal conference. (VA will make up to two attempts to call you between 8:00a.m. and 4:30p.m. Eastern Standard Time at the telephone number and time period you select below to schedule your informal conference. Please select up to two time periods you are available to receive a phone call.)

☐ 8:00a.m. - 10:00a.m.    ☐ 10:00a.m. - 12:30p.m.    ☐ 12:30p.m. - 2:00p.m.    ☐ 2:00p.m. - 4:30p.m.

If you would like for VA to contact your representative, please provide your representative's name and telephone number where he or she can be reached at the above checked time.

VA FORM 20-0996  
XXXX

Page 3

**PART III - ISSUES FOR HIGHER-LEVEL REVIEW**

15. YOU MUST INDICATE BELOW EACH ISSUE DECIDED BY VA FOR WHICH YOU ARE REQUESTING A HIGHER-LEVEL REVIEW. Please refer to your decision notice(s) for a list of adjudicated issues. For each issue, please identify the date of VA's decision. You may attach additional sheets, if necessary. Please include your name and file number on each additional sheet.

Check this box if any issue listed below is being withdrawn from the legacy appeals process. ☐ OPT-IN from SOC/SSOC

1. Select Form    2. Search    3. Review

**Review Anne King's Decision Review Request: Higher-Level**

**What is the Benefit Type?**

☐ Compensation  
☐ Pension & Survivor's Benefits  
☐ Fiduciary  
☐ Insurance  
☐ Education  
☐ Vocational Rehab. & Employment  
☐ Loan Guaranty  
☐ Veterans Health Administration  
☐ National Cemetery Association

**What is the Receipt Date of this form?**

mm/dd/yyyy

**Was an informal conference requested?**

☐ No  
☐ Yes

**Was an interview by the same office requested?**

☐ No  
☐ Yes

**Is the claimant someone other than the Veteran?**

☐ No  
☐ Yes

**Did they agree to withdraw their issues from the legacy system?**

☐ No  
☐ Yes



## Step 3: Review – Headings Explained

- **Benefit type** (Comp, Pension or Non-Pension non-comp - 8 options total). The intake process for compensation, pension and non-pension non-compensation lines of business is very similar.
- **Receipt Date** - The new AMA lanes have specific timelines for appeals' adjudications. The date of the intake is important and should be as accurate as possible. We use the receipt date as the date the review was received.
- **Claimant** - The claimant can be the veteran or not, we use the Veteran ID to identify all cases associated with the veteran. Social security number of the veteran is another way to identify the case.
- **Claimant not in Database** - If the claimant is not the veteran and we don't have the claimant in our database, you can do the following:
  - If you have access to VBMS - you can add the claimant's information to VBMS and refresh this page to select claimant's name.
  - Ask someone on your team with access to VBMS to add the claimant

## Step 3: Input primary form information

- **What is the Benefit Type?** Choose the benefit type against which the appeal is being made.
- **What is the Receipt Date of this form?** Enter the date the form is received. This date is critical for the collection of statutory metrics and should be as accurate as possible.
- **Is the claimant someone other than the Veteran?** If the Claimant is someone other than the Veteran, select Yes. If the person who is claiming the benefit *does not appear* in the list, that person *must be added to the Corporate Database*. Please follow the instructions on the screen to contact the appropriate stakeholder.

Is the claimant someone other than the Veteran?

☐ No

☒ Yes

Please select the claimant listed on the form. If you do not see the claimant in the options below, add them in VBMS, then refresh this page.

☐ Bob Vance, Spouse

☐ Cathy Smith, Child

# Did Claimant Agree to Withdraw from Legacy System?

PART III - ISSUES FOR HIGHER-LEVEL REVIEW
<p>15. YOU MUST INDICATE BELOW EACH ISSUE DECIDED BY VA FOR WHICH YOU ARE REQUESTING A HIGHER-LEVEL REVIEW. <i>Please refer to your decision notice(s) for a list of adjudicated issues. for each issue, please identify the date of VA's decision. You may attach additional sheets, if necessary. Please include your name and file number on each additional sheet.</i></p> <p><i>Check this box if any issue listed below is being withdrawn from the legacy appeals process.</i> <input type="checkbox"/> <b>OPT-IN from SOC/SSOC</b></p>

**Important Note:** If the claimant did not check this box, then any legacy issues in their appeal will be ineligible.

**Did they agree to withdraw their issues from the legacy system?**

☒ No

☐ Yes

INTAKING A FORM

Add Issues

## Step 4: Add Issues

1. Select Form

2. Search

3. Review

4. Add Issues

5. Confirmation

### Add / Remove Issues

Form	Decision Review Request: Higher-Level Review — VA Form 20-0996
Veteran	Martin Merica (231439628)
Receipt date of this form	08/31/2018
Benefit type	Voc Rehab
Informal conference request	No
Same office request	No
Requested issues	<div>+ Add issue</div>

Cancel intake

Establish Higher-Level Review

0 issues

## Step 4: Issues

- Issues are the atomic unit of the Appeals Modernization Act. Many statutory metrics will be tracked at the Issue level.
- As such, it is critically important to record each issue exactly as the Veteran describes it in the form.

## Step 4: Review intake and add issues

- Confirm that the primary review information (Name, Receipt Date, File Number, etc.)
- is correct.
- Begin adding issues from the form, exactly as the Veteran has described them.
- If you make a mistake adding an issue, click the Remove icon to delete the issue.
- Add all issues before finishing intake. Even if issues are unmatched, ineligible, or otherwise difficult to understand, please intake them exactly as the Veteran has described them.

# First, click Add Issue

1. Select Form

2. Search

3. Review

4. Add Issues

5. Confirmation

### Add / Remove Issues

Form	Decision Review Request: Higher-Level Review — VA Form 20-0996
Veteran	Martin Merica (231439628)
Receipt date of this form	08/31/2018
Benefit type	Voc Rehab
Informal conference request	No
Same office request	No
Requested issues	<div>+ Add issue</div>

[Cancel intake](#)

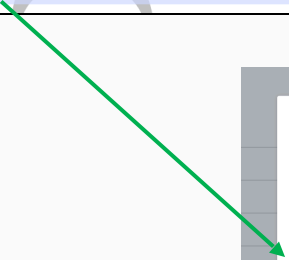
Establish Higher-Level Review

0 issues



# Next, select the known issue that the Veteran is describing

A. Specific Issue(s)	B. Date of Decision
Emphysema effective date should be 10/10/2009	12/19/2018



**Add issue 1**

**Does issue 1 match any of these issues from past descriptions?**  
Tip: sometimes applicants list desired outcome, not what the past decision was -- so select the best matching decision.

**Past decisions from 12/19/2018**

- ☐ Service connection for Emphysema is granted with an evaluation of 100 percent effective June 1, 2013.
- ☐ Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017.

**Notes** Optional

Cancel adding this issue

None of these match, see more options

Add this issue

## Next, select the known issue that the Veteran is describing

- When adding issues in Caseflow, we first show all rating issues the veteran has.
- You can see previous decisions and their dates, select a previous issue if it is the same issue claimant has indicted in their form.
- You can only add one issue at a time.
- If you don't see the issue then select "None of these match, see more options."

# Next, select the issue category from the dropdown

Caseflow > Intake | Merica, Martin (231439628) Search cases BVASCASPER1 (VACO)

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

**Add issue**

Does issue 1 match any of these issue categories?

Issue category  
Select or enter... ▼

Decision date  
mm/dd/yyyy

Issue description

Cancel adding this issue None of these match, see more options Add this issue

0 issues

Caseflow > Intake | Merica, Martin (231439628) Search cases BVASCASPER1 (VACO)

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

**Add issue**

Does issue 1 match any of these issue categories?

Issue category  
Select or enter... ▼

- Apportionment
- Incarceration Adjustments
- Audit Error Worksheet (DFAS)
- Active Duty Adjustments
- Drill Pay Adjustments

Cancel adding this issue None of these match, see more options Add this issue

0 issues

## Next, enter the decision date and issue description

A. Specific Issue(s)	B. Date of Decision
Education effective date should be 10/12/2011	10/11/2018

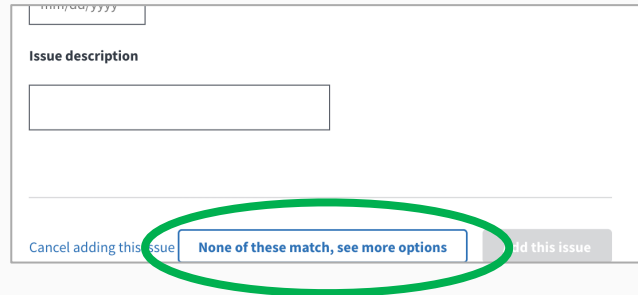
The screenshot shows the 'Add issue 1' dialog box in the Caseflow system. The dialog is titled 'Add issue 1' and contains the following fields:

- Does issue 1 match any of these issue categories?**
  - Issue category: A dropdown menu with the text 'Select or enter...' and a downward arrow.
  - Decision date: A date input field with the placeholder 'mm/dd/yyyy'. A green arrow points from the date '10/11/2018' in the table above to this field.
  - Issue description: A text input field. A green arrow points from the text 'Education effective date should be 10/12/2011' in the table above to this field.
- At the bottom, there are three buttons: 'Cancel adding this issue', 'None of these match, see more options', and 'Add this issue'.

The background shows the Caseflow interface with a progress bar indicating the current step is '4. Add issues'.

## Issues that cannot be categorized

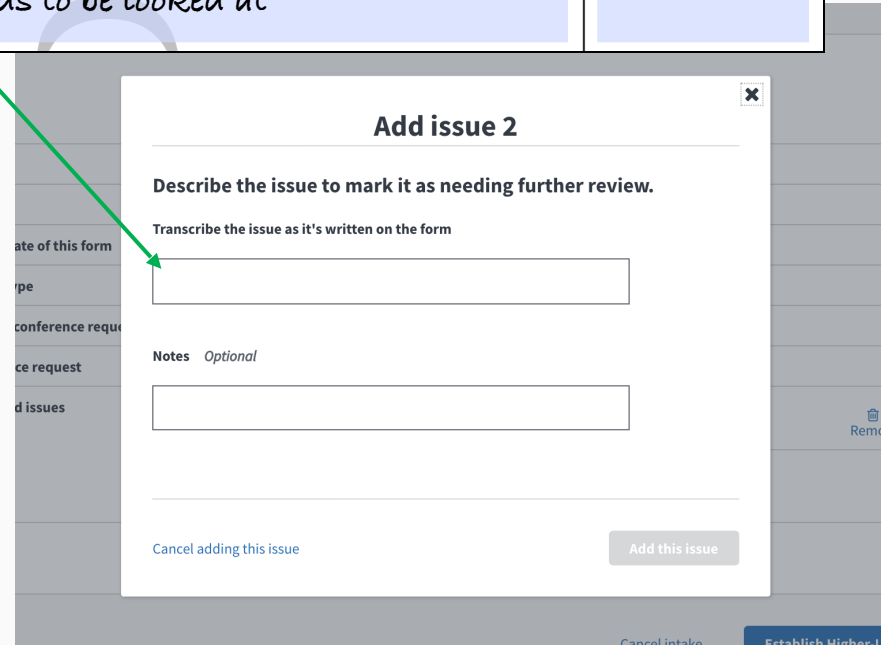
If the issue identified by the Veteran cannot be categorized, is difficult to understand, or has other problems, click “None of these match, see more options”



The screenshot shows a web form for adding an issue. At the top, there is a small input field containing the text "mm/dd/yyyy". Below this is a section titled "Issue description" with a large text area. At the bottom of the form, there are three buttons: "Cancel adding this issue" on the left, "None of these match, see more options" in the center, and "Add this issue" on the right. The "None of these match, see more options" button is highlighted with a green circle.

# Transcribe the issue as best as possible.

A. Specific Issue(s)	B. Date of Decision
This is something that needs to be looked at	



**Add issue 2**

Describe the issue to mark it as needing further review.

Transcribe the issue as it's written on the form

Notes *Optional*

Cancel adding this issue Add this issue

The screenshot shows a modal form titled 'Add issue 2'. It contains a text input field for transcribing the issue, a 'Notes' section with an 'Optional' label and another text input field, and two buttons at the bottom: 'Cancel adding this issue' and 'Add this issue'. A green arrow points from the text 'This is something that needs to be looked at' in the table above to the transcription input field.

Transcribe the issue as best as possible.

If you can't intake issues based on the category options, write down what veteran wrote and add any notes you see pertinent.

## Step 4: Review and submit the appeal

1. Select Form

2. Search

3. Review

4. Add Issues

5. Confirmation

### Add / Remove Issues

Form	Decision Review Request: Higher-Level Review — VA Form 20-0996
Veteran	Martin Merica (231439628)
Receipt date of this form	08/31/2018
Benefit type	Voc Rehab
Informal conference request	No
Same office request	No
Requested issues	<div><div>1. Incarceration Adjustments - This is an issue Decision date: 08/31/2018</div><div>2. Unidentified issue: no issue matched for "What the Veteran wrote" <i>Notes: any supportive information</i></div></div> <div><div>+ Add issue</div></div>

Cancel intake

Establish Higher-Level Review

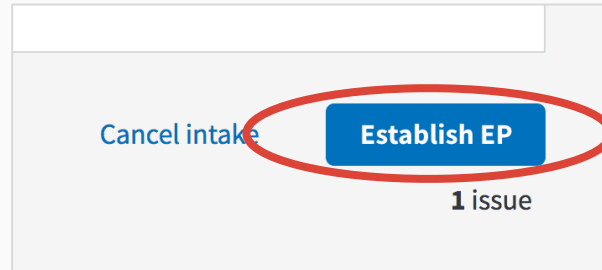
2 issues



# Review the Appeal – Things to Consider

- ✓ Before submitting the intake, **make sure the number of issues are the same in the intake as the number of issues written on the form**
- ✓ Check that the dates are correct
- ✓ Check that each issue reflects the text stated by the claimant
- ✓ Make sure that you include any notes that might help the next person work the appeal
- ✓ It is possible that an issue will be highlighted as ineligible. This is expected for some issues. It is important to record all the issues indicated by the Veteran, regardless of their eligibility.

## Submit the appeal



A screenshot of a web form interface. At the top is a white rectangular input field. Below it, on a light gray background, is the text "Cancel intake" in blue. To the right of this text is a blue button with the white text "Establish EP". A red oval is drawn around the "Establish EP" button. Below the button, the text "1 issue" is displayed in black.

INTAKING A FORM

Confirmation

1. Select Form

2. Search

3. Review

4. Add Issues

5. Confirmation

## Intake completed

Martin Merica's (ID #231439628) Request for Decision Review Request: Higher-Level Review — VA Form 20-0996 has been processed. If you need to edit this, go to VBMS claim details and click the "Edit in Caseflow" button.

**Edit the notice letter to reflect the status of requested issues.**

✓ **A Higher-Level Review Rating EP is being established:**

Contention: Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017.

[Begin next intake](#)

## Confirmations

Every time an intake is completed, you will see a confirmation page. From this page, you can start a new intake, as well as review the information of the previous intake.

ADDING ISSUES

Sometimes adding an issue to your intake might take a bit more work – here are some special cases we have identified.

## Important Note

This information applies to decisions made after February 18, 2019.

Decisions made before that must be appealed under the legacy appeals process.



ADDING ISSUES

Unidentified Issues

## Unidentified issues

Issues where we don't (currently) know what decision the appellant is contesting.

### **Example:**

Sometimes the Veteran will write something that requires a little more expertise to interpret.

## Example:

A. Specific Issue(s)	B. Date of Decision
Everything in my previous appeal	10/11/2018

veteran

Receipt date of t

Benefit type

Informal confere

Same office requ

Claimant

Requested issue:

Add issue 1

Describe the issue to mark it as needing further review.

Transcribe the issue as it's written on the form

Everything in my previous appeal

Notes

Optional

I have no idea what the veteran means by this

Cancel adding this issue

Add this issue

Establish EP

0 issues

These unidentified issues can be resolved downstream, by editing the request issues on the decision review.

The screenshot displays the VBMS interface for a claim review. The top navigation bar includes links for Search, Work Queue, Intake, Unassociated Documents, LCM Unassociated, Scorecards, and Admin. The user is logged in as 'TEST ONE'. The main header shows the veteran's name 'JULIE UNDERWOOD' and file number '123458300'. The claim title is '033 - Higher-Level Review Rating'. Below the title, there are links for 'Go to Work Item', 'Days Pending: 31', 'Date of Claim: 10/10/2018', 'Status: RFD', 'Suspense Date: 12/09/2018', 'App Form: N/A', and 'Team'. A green arrow points from the text above to the 'Edit in Caseflow' button. The 'EXPAND CLAIM DETAILS' section shows a navigation bar with 'Contentions List' (selected), 'Development', 'Letters', 'Tracked Items', 'Exams', and 'Claim Notes'. Below this, there are buttons for 'Add Contention' and 'Edit in Caseflow'. A message box at the bottom states: '+ UNIDENTIFIED ISSUE - Please click "Edit in Caseflow" button to fix'. The right sidebar contains a 'Veteran Summary' section with fields for SSN, EDIPI, Gender, Birth Date, Death Date, and General POA. Below this are sections for 'Pending Claims', 'Military Service', 'Rated Issues', and 'Veteran Flashes'.

VBMS Search Work Queue Intake Unassociated Documents LCM Unassociated Scorecards Admin My History TEST ONE

Fri Nov 09 2018 06:39:39PM EST , Version 16.0-20181106-1552 , ID 600179342

JULIE UNDERWOOD File #: 123458300 Veteran Claims Documents Rated Issues Notes

033 - Higher-Level Review Rating

Go to Work Item Days Pending: 31 Date of Claim: 10/10/2018 Status: RFD Suspense Date: 12/09/2018 App Form: N/A Team

Assigned to: N/A Assigned to: N/A

EXPAND CLAIM DETAILS

Contentions List Development Letters Tracked Items Exams Claim Notes

Add Contention Edit in Caseflow

+ UNIDENTIFIED ISSUE - Please click "Edit in Caseflow" button to fix

Veteran Summary

Veteran Information

SSN: 123458300  
EDIPI: Unavailable  
Gender: Male  
Birth Date: 01/01/1970  
Death Date:  
General POA:  
SC: 30

Pending Claims

Military Service

Rated Issues

Veteran Flashes

- Unidentified issues should be resolved before making a decision on them.
- Unidentified issues that are never resolved will be considered to have been ineligible.

ADDING ISSUES

Ineligible Issues

- Users may encounter issues that are *ineligible*.
- Ineligible issues are identified on the Add/ Review Issue page and Confirmation page.
- Follow SOP to notify the Veteran/ Claimant of ineligible issues.

As the Veteran/ Claimant navigates the appeal process, some lanes selections have different policy requirements for future decision appeals.

An appeal is ineligible:

- If the request is an HLR and same issue was last processed as an HLR
- If the request is a Board Appeal and the same issue was last processed as a Board Appeal
- If the request is a HLR and same issue was last processed as a Board Appeal



For all identified issues, we have some automated eligibility checks.

## An issue gets selected

Caseflow > Intake Abraham Lincoln

### Add issue 1

**Does issue 1 match any of these issues from past decisions?**

Tip: sometimes applicants list desired outcome, not what the past decision was – so select the best matching past decision.

**Past decisions from 4/04/2018**

- ☐ Service connection for Emphysema is granted with an evaluation of 100 percent effective June 1, 2013.
- ☒ Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017.

**Past decisions from 6/04/2018**

- ☐ Basic eligibility to Dependents' Educational Assistance is established from May 1, 2013.
- ☐ Service connection for tinnitus is denied.

**Past decisions from 7/19/2017**

- ☐ Evaluation of posttraumatic stress disorder (PTSD) which is currently 50 percent disabling, is increased to 70 percent effective 07/19/2016.

Notes *Optional*

Cancel adding this issue [None of these match, see more options](#) [Add this issue](#)

## Review page shows ineligibility

Caseflow > Intake Abraham Lincoln

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

### Add/Remove Issues

Form	Higher-level review (VA Form 20-0988)
Veteran	Ulysses Grant (ID #888451290)
Form receipt date	09/01/2018
Benefit type	Compensation
Claimant	Julia Grant (payee code ###)
Requested issues	<p>1. Ineligible due to same issue already under review as a Supplemental Claim: Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.</p> <a href="#">Remove</a>

[+ Add issue](#)

[Cancel intake](#) [Complete intake](#)

An issue is ineligible

...if the request is an HLR and same issue was last processed as an HLR

OR

...if the request is a Board Appeal and the same issue was last processed as a Board Appeal.

Displayed Copy:

[Issue selected] is ineligible because it was last processed as a [HLR/Appeal] and this can't be done twice in a row.

...if the request is a SC/ HLR/ Board Appeal and the same issue is being processed in another lane

Displayed Copy:

[Issue selected] is ineligible because it's already under review as a [SC/HLR/Appeal].

...if the request is a Higher-Level Review and same issue was last processed as a Board Appeal

Displayed Copy:

[Issue selected] is ineligible because it was last processed as a Board Appeal which can't be followed by a Higher-Level Review.

## ...if Timeliness not exempted

If the issue has a decision date older than 1 year and the Veteran/ Claimant didn't request an "exemption to the date requirements."

Displayed Copy:

[Issue selected] is ineligible because it has a prior decision date that's older than 1 year.

## Past decision

Caseflow > Intake Abraham Lincoln

1. Select Form

### Add issue 3

**Does issue 3 match any of these issues from past decisions?**

Tip: sometimes applicants list desired outcome, not what the past decision was – so select the best matching past decision.

**Past decisions from 4/04/2018**

- ☐ Service connection for Emphysema is granted with an evaluation of 100 percent effective June 1, 2013. (already selected for issue 2)
- ☐ Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. (already selected for issue 1)

**Past decisions from 6/04/2018**

- ☐ Basic eligibility to Dependents' Educational Assistance is established from May 1, 2013.
- ☐ Service connection for tinnitus is denied.

**Past decisions from 7/19/2017**

- ☒ Evaluation of posttraumatic stress disorder (PTSD) which is currently 50 percent disabling, is increased to 70 percent effective 07/19/2016.

Notes Optional

[Cancel adding this issue](#) [None of these match, see more options](#) [Add this issue](#)

## Request exemption

Caseflow > Intake Abraham Lincoln

1. Select Form

### Issue 3 is an Untimely Issue

**Requested issue:** Evaluation of posttraumatic stress disorder (PTSD) which is currently 50 percent disabling, is increased to 70 percent effective 07/19/2016.

The issue requested isn't usually eligible because it's decision date is older than what's allowed.


**Did the applicant request an exemption to the date requirements?**

- ☐ Yes
- ☐ No

Notes Optional

[Cancel adding this issue](#) [Add this issue](#)

If the requested issue has a decision date older than 1 year but applicant included a request to override.

 **Caseflow** > Intake

Abraham Lincoln ▾

1. Select Form




2. Search

3. Review

4. Add Issues

5. Confirmation

## Add/Remove Issues

Form	Higher-level review (VA Form 20-0988)
Veteran	Ulysses Grant (ID #888451290)
Form receipt date	09/01/2018
Benefit type	Compensation
Claimant	Julia Grant (payee code ###)
Requested issues	<div><div>1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017 is ineligible because this issue is already under review as Supplemental Claim. Remove</div><div>2. Service connection for Emphysema is granted with an evaluation of 100 percent effective June 1, 2013 is ineligible because this issue was last processed as a Higher-Level Review and this can't be done twice in a row. Remove</div><div>3. Evaluation of posttraumatic stress disorder (PTSD) which is currently 50 percent disabling, is increased to 70 percent effective 07/19/2016. Remove</div></div> <div>+ Add issue</div>

Cancel intake

Complete intake



If the requested issue has a decision date older than 1 year and applicant didn't include a request to override.

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

## Add/Remove Issues

Form	Higher-level review (VA Form 20-0988)
Veteran	Ulysses Grant (ID #888451290)
Form receipt date	09/01/2018
Benefit type	Compensation
Claimant	Julia Grant (payee code ###)
Requested issues	<div>1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017 is ineligible because this issue is already under review as Supplemental Claim. <a href="#">Remove</a></div> <div>2. Service connection for Emphysema is granted with an evaluation of 100 percent effective June 1, 2013 is ineligible because this issue was last processed as a Higher-Level Review and this can't be done twice in a row. <a href="#">Remove</a></div> <div>3. Evaluation of posttraumatic stress disorder (PTSD) which is currently 50 percent disabling, is increased to 70 percent effective 07/19/2016 is ineligible because it has a prior decision date that's older than 1 year. <a href="#">Remove</a></div> <div><a href="#">+ Add issue</a></div>

Cancel intake

Complete intake

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

## Intake completed

Ulysses Grant's (ID #888451290) Request for Higher-level review (VA Form 20-0988) has been processed. Edit the notice letter to reflect status of requested issues.

### \* Ineligible

Service connection for tinnitus is ineligible because the same issue is under review as a Legacy Appeal but the claimant didn't choose to withdraw their issue from the legacy system.

Begin next intake

Ineligible issues will be saved to the Caseflow database, and appear on the Add/Review issues page.

They will not be developed or decided on.

**Do not delete ineligible issues**; they are critical for developing statutory metrics.

# EDITING ISSUES

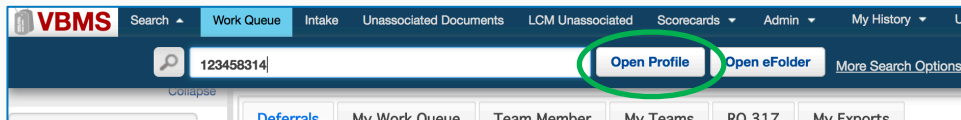
From VBMS

## Issues must be edited in Caseflow

To edit an issue:

1. Search for the file number with the EP you want to edit in VBMS
2. Click the EP with the issue you want to edit
3. Click the Edit in Caseflow button

This will take you to the Add/ Remove Issues page for that EP in Caseflow.



1. Search for the file number

	Date of Claim	EP Code - Claim Label	Status	Benefit Type	Payee Code
+	02/06/2019	040 - Supplemental Claim Rating	OPEN	CPL	00 - Veteran
+	02/06/2019	034 - Board Grant Rating	RFD	CPL	00 - Veteran
+	01/23/2019	033 - Board Grant Non-Rating	RW	CPL	00 - Veteran

2. Click the EP to be edited

**040 - Supplemental Claim Rating**

[Go to Work Item](#) | Days Pending: 21 | Date of Claim: 02/06/2019 | Status: OPEN | Suspense Date: 02/17/2019 | App Form: N/A | Team Assigned to: N/A

Assigned to: N/A

**EXPAND CLAIM DETAILS**

Contentions List | Development | Letters | Tracked Items | Exams | Claim Notes

[Add Contention](#) | [Edit in Caseflow](#)

Service connection for Service connection for Back is denied. is granted with an evaluation of 50 percent effective January 1, 2019.

Service connection for Back is denied.

3. Click Edit in Caseflow

## Add / Remove Issues

Form	Decision Review Request: Supplemental Claim — VA Form 20-0995
Veteran	Elly Gish (123458314)
Receipt date of this form	02/06/2019
Benefit type	Compensation
Claimant	Elly Gish
Requested issues	<div><div>1. Service connection for Back is denied. Decision date: 07/29/2018</div><div>2. Service connection for Service connection for Back is denied. is granted with an evaluation of 50 percent effective January 1, 2019. Decision date: 01/03/2019</div></div> <div><div>+ Add issue</div></div>

### 4. Edit the EP.

Note: In order to edit specific parts of any given issue/ contention, you may need to *remove* that issue and re-add it.

See the *Adding Issues* section for instructions on adding issues.

Cancel

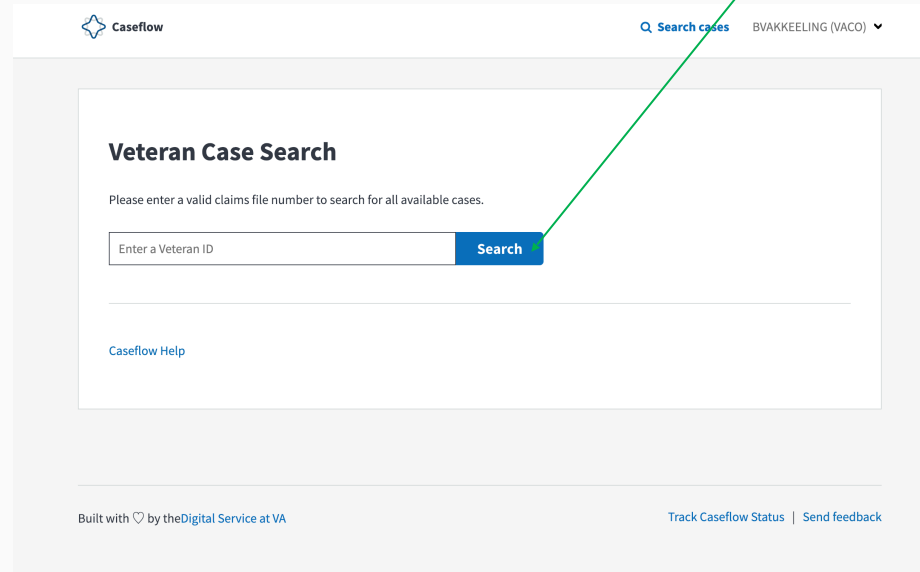
Save

1 issue

### 5. Click the Save button.

SEARCH FOR ISSUES

If an intake is completed and you need to review the appeal information, you can access the case via **Search**



The screenshot shows the Caseflow web application interface. At the top left is the Caseflow logo. At the top right are links for "Search cases" and a user profile for "BVAKKEELING (VACO)". The main content area is titled "Veteran Case Search" and includes a prompt: "Please enter a valid claims file number to search for all available cases." Below this is a text input field labeled "Enter a Veteran ID" and a blue "Search" button. A green line originates from the word "Search" in the text above the screenshot and points directly to the "Search" button. At the bottom of the page, there is a footer with the text "Built with ❤️ by the Digital Service at VA" and links for "Track Caseflow Status" and "Send feedback".



This page can show EPs as they are being created. You can see if there was an error with the creation of the EP, and check the status of an intake.

Caseflow

[Search cases](#) BVAKKEELING (VACO) ▾

### Veteran Case Search

Please enter a valid claims file number to search for all available cases.

× Search

**2 cases found for “Elda Z Quigley (872958715)”**

#### Appeals

Docket	Appellant Name	Status	Type(s)	Decision Date	Assigned To
<a href="#">7705707</a>	Elda Z Quigley	Remand	AOD, Original	10/22/18	98
<a href="#">7705707</a>		Advance			
This is a paper case					

#### Higher Level Reviews & Supplemental Claims

Appellant Name	Review Type	EP Code(s)	EP Status
Anne King	Higher Level Review	null null	Processing
Anne King	Higher Level Review	null null	Cleared
Anne King	Higher Level Review	No EPs created	

# From the search results page, you can access the Case Detail page for Board appeals.

The screenshot shows the Caseflow Case Detail page for Elda Z Quigley. At the top, the Caseflow logo is on the left, and a search bar with 'Search cases' and a dropdown menu showing 'BVA/KEELING (VACO)' is on the right. Below the header, the case name 'Elda Z Quigley' is displayed next to the 'Veteran ID: 872958715' and a 'View all cases' link. A horizontal bar contains four sections: 'DOCKET' with a button '7703707', 'VETERAN DOCUMENTS' with a link 'View 19 docs' and a 'NEW' badge, 'TYPE' with 'AOD, Original', and 'DECISION DOCUMENT ID' with '172482059.747'. Below this is a 'Currently active tasks' section showing 'No active tasks'. At the bottom, there is a sidebar with links: 'Issues', 'Power of Attorney', 'About the Veteran', and 'Case Timeline'. The main content area is titled 'Issues' and contains 'Issue 1' with details: 'PROGRAM: Compensation', 'ISSUE: Service connection', 'All Others', 'CODE: 7347 - Pancreatitis', and a note in Latin: 'NOTE: Itaque adipisci aut ullam voluptas recusandae possimus facilis.'

Caseflow

Search cases BVA/KEELING (VACO) ▼

**Elda Z Quigley** Veteran ID: 872958715 View all cases

DOCKET VETERAN DOCUMENTS TYPE DECISION DOCUMENT ID

7703707 View 19 docs NEW AOD, Original 172482059.747

**Currently active tasks**

No active tasks

Issues >

Power of Attorney >

About the Veteran >

Case Timeline >

**Issues**

**Issue 1**

PROGRAM: Compensation

ISSUE: Service connection

All Others

CODE: 7347 - Pancreatitis

NOTE: *Itaque adipisci aut ullam voluptas recusandae possimus facilis.*

## EDITING ISSUES

## Editing issues in Caseflow

Once an appeal or a review is in our system, Caseflow users can make edits to issues if they find out there was a mistake during the intake or have received clarification about the review request of the veteran or claimant.

If you are coming in from a review in Casflow, you can use the “Correct issues” button to edit the review

The screenshot displays the Casflow user interface. At the top, the Casflow logo is on the left, and a search bar with 'Search cases' and the user name 'REBECCA SMITH' is on the right. The main header for the case is 'Joe Snuffy', with a 'Veteran ID: 222222222' and links to 'View Veteran's documents: 5 docs' and 'View all cases'. Below this, there are three columns: 'About the case' (containing 'TYPE: AOD, CAVC', 'DOCKET: 09-1212', and 'TOTAL DAYS WAITING: 1'), 'Assigned by: H. Anderson' with 'Case instructions', and 'Actions' with a 'Select action' dropdown. A left sidebar lists navigation options: 'Issues', 'Power of Attorney', 'Hearings', 'About the Veteran', and 'About the Appellant'. The 'Issues' section is expanded, showing two items. The first item, 'Benefit type: Compensation', has an 'Issue' description, a 'Diagnostic code: 7914', and a 'Note from NOD'. The second item, also 'Benefit type: Compensation', has an 'Issue' description, a 'Diagnostic code: 7913', and a 'Note from NOD'. A 'Correct issues' button is located at the top right of the 'Issues' list, and a green arrow points to it from the top right of the slide. A 'View NOD' link is at the bottom of the issues list.

**Caseflow** Search cases REBECCA SMITH

### Joe Snuffy

Veteran ID: 222222222 View Veteran's documents: 5 docs View all cases

**About the case** Edit

TYPE: AOD, CAVC

DOCKET: 09-1212

TOTAL DAYS WAITING: 1

**Assigned by:** H. Anderson

**Case instructions:** Any notes from judge to the attorney. Any notes from judge to the attorney. Any notes from judge to the attorney. Any notes from judge to the attorney.

**Actions**

Select action

Issues >

Power of Attorney >

Hearings >

About the Veteran >

About the Appellant >

### Issues

Correct issues

- Benefit type:** Compensation  
**Issue:** Service connection for pain disorder is granted with an evaluation of 70% effective May 1, 2011  
**Diagnostic code:** 7914  
*Note from NOD: Pain disorder with 100% evaluation per examination*
- Benefit type:** Compensation Stayed  
**Issue:** Service connection for tinnitus is granted with an evaluation of 50% effective May 1, 2011  
**Diagnostic code:** 7913  
*Note from NOD: Want evaluation of 100%*

View NOD

# Add / Withdraw / Remove

When returning to intake to edit issues, user will see all issues that are part of this review.

Add more  
issues if  
necessary

Remove and  
withdraw issues

Caseflow > Intake

Abraham Lincoln ▾

### Edit Issues

Form	Supplemental Claim (VAForm 21-526b)
Veteran	Ulysses Grant (ID #888451290)
Form receipt date	09/01/2018
Benefit type	Compensation
Claimant	Julia Grant (payee code ###)
Requested issues	<div><div><div>1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.</div><div>2. Incarceration Adjustments. Decision date 06/12/2017.</div><div>3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011 <i>Notes: Pain disorder with 100% evaluation per examination</i></div></div><div><div>Select action ▾ Withdraw issue Remove issue</div><div>Select action ▾</div></div></div>

+ Add issue

Cancel Save

# Editing issues in Caseflow

In order to edit an issue, you need to remove the issues from Caseflow and the re-add it with the corrected selection or information.

Caseflow > Intake Abraham Lincoln

### Edit Issues

Form Supplemental Claim (VA Form 21-526b)

Veteran Ulysses Grant (ID #888451290)  
Form receipt date 09/01/2018

Benefit type Compensation

Claimant Julia Grant (payee code ###)

**When you finish making changes, click "Save" to continue**

**Requested issues**

1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.  
Select action  
Withdraw issue  
Remove issue

2. Incarceration Adjustments. Decision date 06/12/2017.  
Select action

3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011  
Notes: Pain disorder with 100% evaluation per examination  
Select action

+ Add issue

Cancel Save

Remove existing issue

Add updated issue

Make all necessary changes to this review before you save.

# Editing issues in Caseflow

Caseflow will give you a warning message before you remove issues, this is to make sure you are aware you are making changes to the review.

**Do not remove issues unless there was a mistake with the intake.**

The screenshot shows the Caseflow 'Edit Issues' interface. At the top, the breadcrumb 'Caseflow > Intake' is visible on the left, and the user 'Abraham Lincoln' is on the right. The main heading is 'Edit Issues'. Below this, a form is displayed with fields for 'Form' (Supplemental Claim (VA Form 21-526b)), 'Veteran' (Ulysses Grant (ID #889451290)), 'Form receipt date', 'Benefit type', 'Claimant', and 'Requested issues'. A modal dialog titled 'Remove review?' is centered on the screen. The dialog text reads: 'This review originally had 4 issues but now it has 0. This review and all tasks associated with it will be removed.' At the bottom of the dialog are two buttons: 'Cancel' and 'Yes, remove'. Below the form, there is a '+ Add issue' button. At the bottom right of the form area, there are 'Cancel' and 'Save' buttons.



# Withdraw issues

There are circumstances when veterans or claimants will request to withdrawn an issues.

There are many reasons a veteran may want to do this, we ask them to send this request in writing.

Caseflow > Intake Abraham Lincoln

### Edit Issues

Form	Supplemental Claim (VAForm 21-526b)	
Veteran Form receipt date	Ulysses Grant (ID #888451290) 09/01/2018	
Benefit type	Compensation	
Claimant	Julia Grant (payee code ###)	
	When you finish making changes, click "Save" to continue	
Requested issues	<div><div>1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.</div><div>Select action Withdraw issue Remove issue</div></div> <div><div>2. Incarceration Adjustments. Decision date 06/12/2017</div><div>Select action</div></div> <div><div>3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011 Notes: Pain disorder with 100% evaluation per examination</div><div>Select action</div></div>	

+ Add issue

Cancel Save

Withdraw issue

# Withdraw issues

You will see a list of all withdrawn issues before you save the changes.

Add the date the issue withdrawal was requested. This date cannot be after today's date or before the review's date, otherwise you will get an error and ask to re-enter.

Caseflow > Intake Abraham Lincoln ▾

### Edit Issues

Form	Supplemental Claim (VA Form 21-526b)
Veteran	Ulysses Grant (ID #888451290)
Form receipt date	09/01/2018
Benefit type	Compensation
Claimant	Julia Grant (payee code ###)

**i** When you finish making changes, click "Save" to continue

**Requested issues**

2. Incarceration Adjustments. Decision date 06/12/2017. Select action ▾

3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011. Select action ▾  
*Notes: Pain disorder with 100% evaluation per examination*

[+ Add issue](#)

**Withdrawn issues**

1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018. Undo  
*Withdraw pending*

Please include the date the withdrawal was requested

[Cancel](#) [Save](#)

## Confirmation

Once you are done with changes you will see a confirmation on the page you came from in Caseflow.



### **Edit Complete**

You have successfully withdrawn the following issue(s):

Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011. Notes: Pain disorder with 100% evaluation per examination for Ulysses Grant (ID #888451290)

//Withdrawing review is still  
in development

## WITHDRAWING REVIEWS

# Withdraw reviews

There are circumstances where the Veteran or claimant may ask to withdraw their review.

Caseflow > Intake

Abraham Lincoln

### Edit Issues

Form	Supplemental Claim (VA Form 21-526b)	Select action
Veteran	Ulysses Grant (ID #888451290)	Withdraw review
Form receipt date	09/01/2018	Remove review
Benefit type	Compensation	
Claimant	Julia Grant (payee code ##)	
Requested issues	1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.	Select action
	2. Incarceration Adjustments. Decision date 06/12/2017.	Select action
	3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011 <i>Notes: Pain disorder with 100% evaluation per examination</i>	Select action
<a href="#">+ Add issue</a>		

[Cancel](#)[Save](#)

# Withdraw reviews

If you withdraw a review, you are withdrawing every issue in that review. You will see this preview to make sure your changes are correct before withdrawing the review.

Add date the review withdrawal was requested. This date cannot be after today's date or before the review's date, otherwise you will get an error and ask to re-enter.

### Edit Issues

Form	Supplemental Claim (VA Form 21-526b)	Select action ▾
Veteran	Ulysses Grant (ID #888451290)	
Form receipt date	09/01/2018	
Benefit type	Compensation	
Claimant	Julia Grant (payee code ###)	

Withdrawn issues

This review will be withdrawn. You can intake these issues as a different type of decision review, if that was requested.

1. Basic eligibility to Dependents' Educational Assistance is established from October 1, 2017. Decision date 04/04/2018.

Undo

2. Incarceration Adjustments. Decision date 06/12/2017.

Undo

3. Service connection for pain disorder is granted with an evaluation of 70% effective May 1 2011

Undo

Notes: Pain disorder with 100% evaluation per examination

Withdraw pending

Please include the date the withdrawal was requested


03/01/2019


Cancel

Withdraw

# Review status

If you are using Caseflow to process your review – you can see the status of the review to “Withdrawn”.

 Caseflow

 Search cases

## Veteran Case Search

Please enter a valid 9-digit Veteran SSN or claims file number to search for all available cases.

### 5 reviews found for “Ewald D Buckridge | 213493092”

#### Appeals

	Docket Number	Appellant Name	Type(s)	Decision date	Assigned to	Status
 	180203	Ewald D Buckridge	AOD, Original		Attorney X	Withdrawn
 	92929	Ewald D Buckridge	Reconsideration		Administration admin team	
	180203	Ewald D Buckridge	Original		Attorney X	

#### Higher-level Reviews and Supplemental Claims

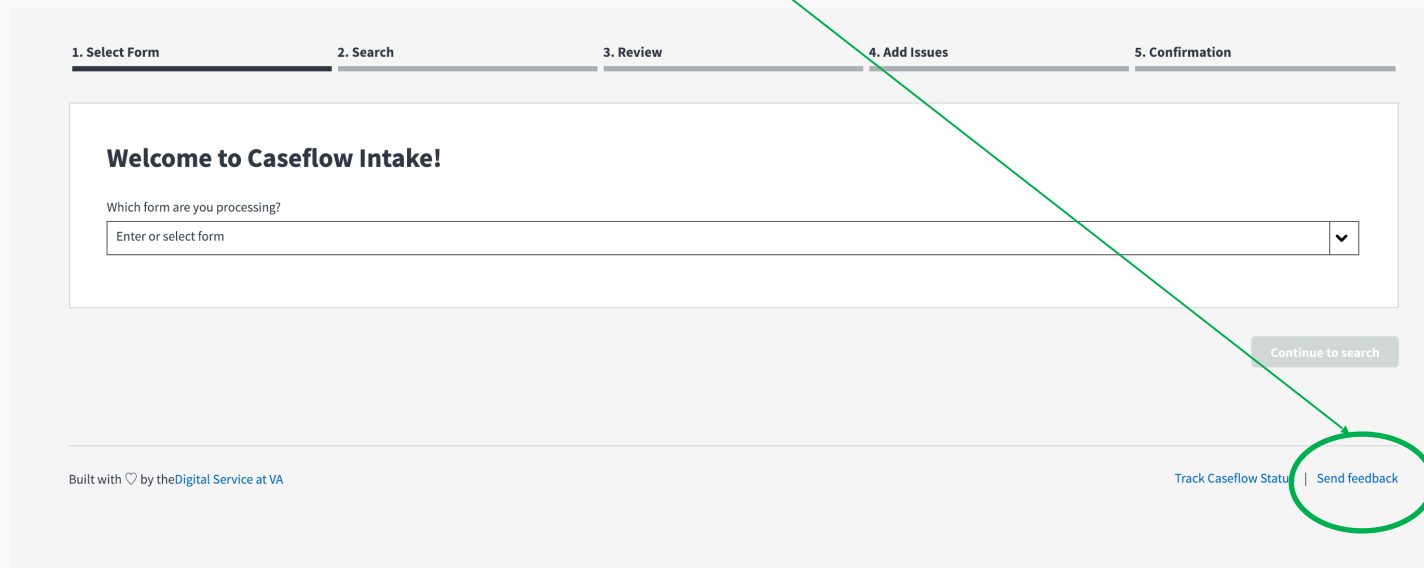


SEND US FEEDBACK



# Send us feedback

If you run into a problem or have comments or requests, **please let us know!**



The screenshot shows the 'Caseflow Intake' form. At the top, there is a progress bar with five steps: 1. Select Form, 2. Search, 3. Review, 4. Add Issues, and 5. Confirmation. The '1. Select Form' step is currently active. Below the progress bar, the heading 'Welcome to Caseflow Intake!' is displayed. Underneath, the text 'Which form are you processing?' is followed by a search input field containing the placeholder text 'Enter or select form' and a dropdown arrow. To the right of the input field is a 'Continue to search' button. At the bottom of the form, there is a footer section. On the left, it says 'Built with ❤️ by the Digital Service at VA'. On the right, there are two links: 'Track Caseflow Status' and 'Send feedback'. A green arrow originates from the text 'please let us know!' and points directly to the 'Send feedback' link, which is also circled in green.

1. Select Form 2. Search 3. Review 4. Add Issues 5. Confirmation

**Welcome to Caseflow Intake!**

Which form are you processing?

Enter or select form

Continue to search

Built with ❤️ by the Digital Service at VA

Track Caseflow Status | [Send feedback](#)

# THANK YOU



DIGITAL SERVICE at VA

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