Business Transformation Systems (BTS) Direct Upload Job Aid and Frequently Asked Questions

OFFICE OF BUSINESS INTEGRATION

12.13.2021

VA | U.S. Department of Veterans Affairs

Table of Contents

Overview

As a Veteran, Veteran family member, Veterans Service Organization (VSO), attorney or other third party representing a Veteran, you have the capability to use the Direct Upload tool to upload Veteran claims and evidence through the Centralized Mail portal making it the fastest and most efficient way to submit Veteran evidence to the VBA Claims Intake Center.

This capability also provides each user with a comprehensive audit history of all material directly uploaded to the Centralized Mail portal improving both Veteran and employee experiences by enabling claims evidence material to be electronically accessible for immediate processing.

Key capabilities to the Direct Upload tool include:

- Full assurance of complete submission
- Prevents the need to print evidence for faxing or mailing
- Incorporate immediate email notification of submission
- Date of submission becomes the official VA date of receipt
- Full historical reporting is available for all submissions
- Historical submissions can be opened, and documents reviewed
- Real time updates on the status of submission

1 Logging In To Direct Upload

1. Users with VA network access, a VA email address and a valid PIV badge can use VA Single Sign On to access the Direct Upload tool while using the VA intranet.

SSO users can logon to Direct Upload by going to: https://dmhs.digitalcontentservices.com/

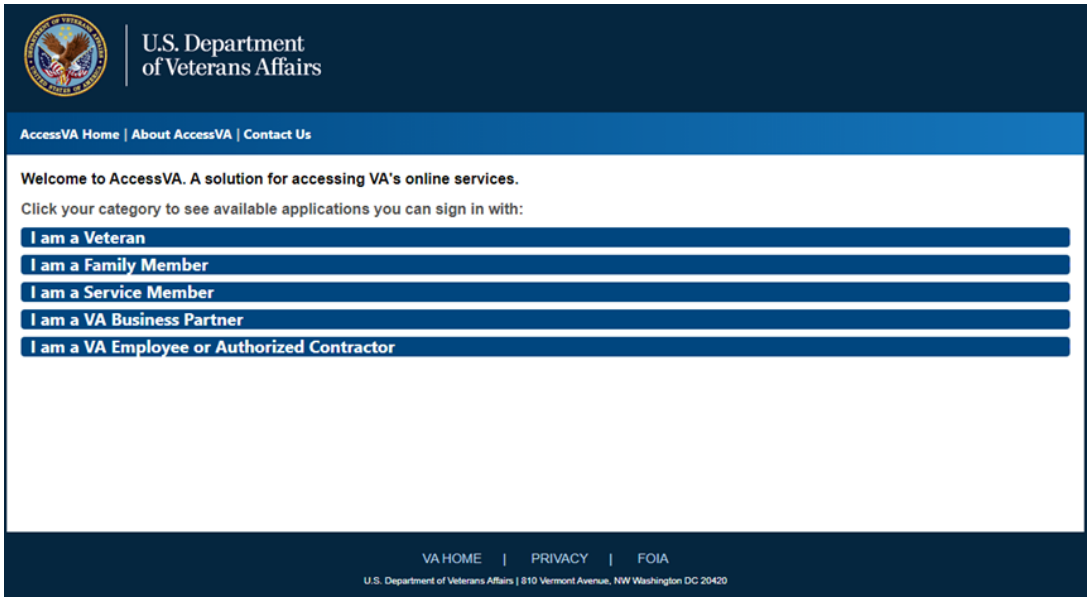
U.S. Department of Veterans Affairs

leidos

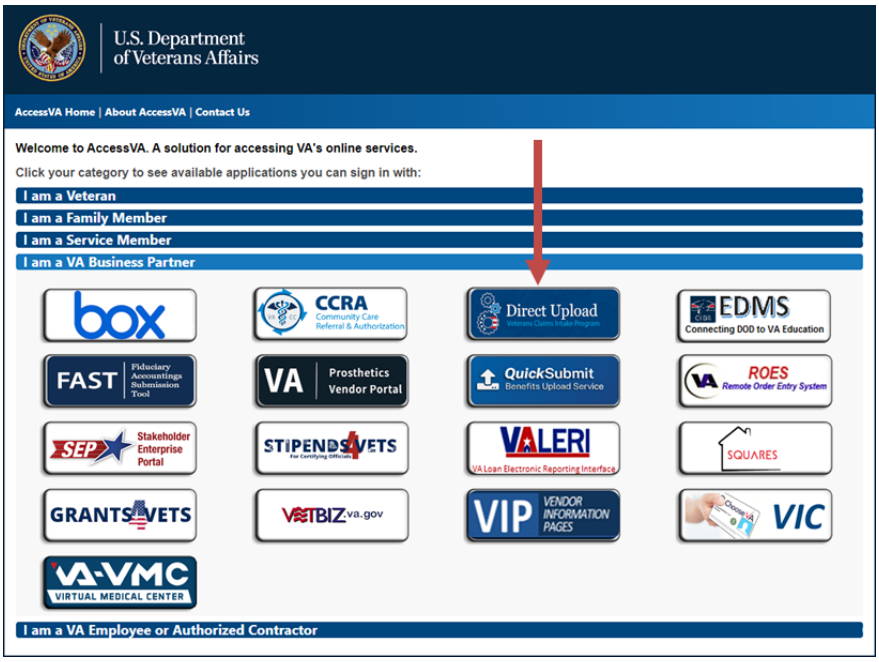
2. Veterans, VSOs, Attorneys, other third parties with no VA network access, PIV card or VA email address can access Direct Upload via AccessVA using ID.me authentication.

   ID.me is VA's third-party authentication provider of choice. Detailed information about creating an ID.me account to access Direct Upload and other government services can be found at https://www.id.me/individuals/government.

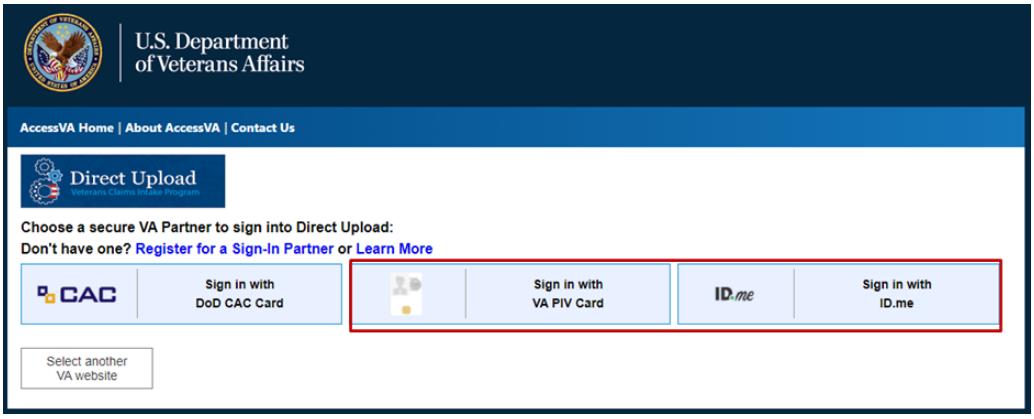
   ID.me users must use AccessVA to login. AccessVA can be found at: https://eauth.va.gov/accessva/.



On AccessVA, choose the appropriate category and then choose Direct Upload.

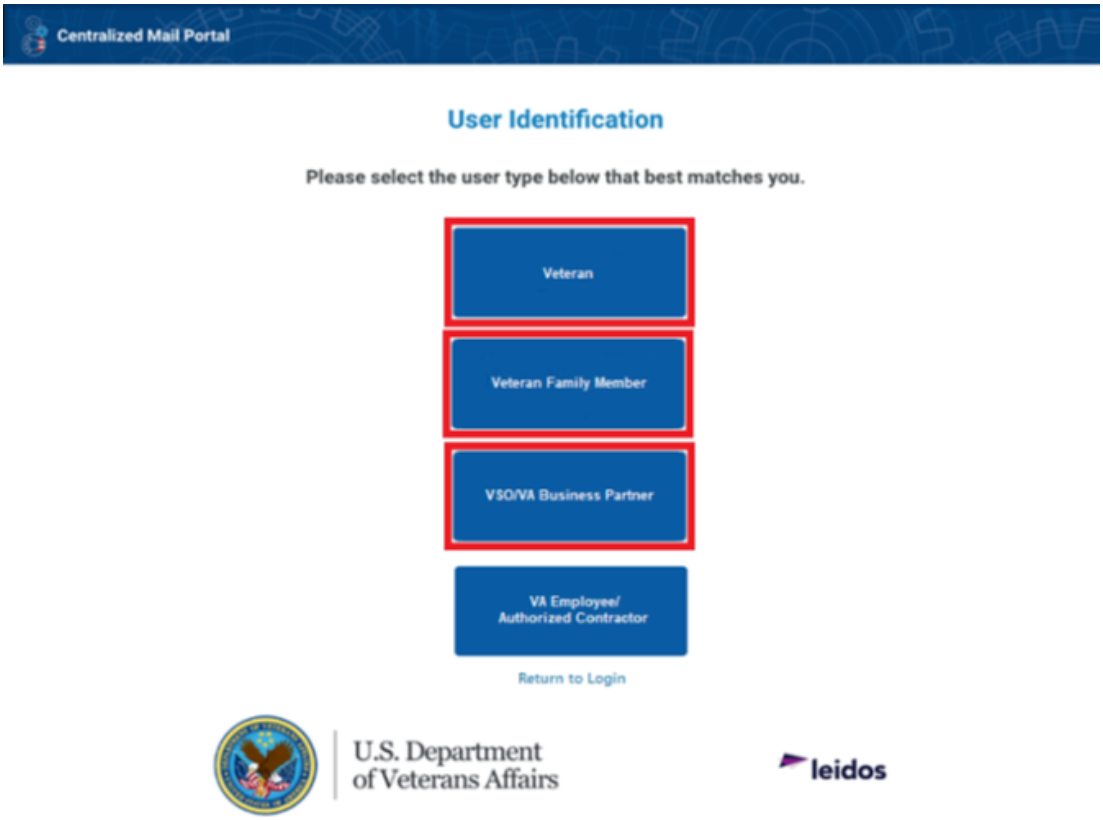


After selecting Direct Upload, users will be taken to the AccessVA Login Page. Choose ID.me or the VA PIV card selection as applicable. Users will be logged into Direct Upload at this point.



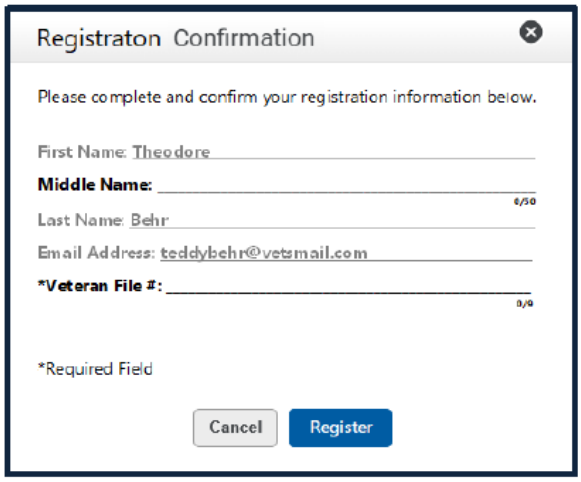
2 Initial User Registration

During the first sign-on attempt, users must register in the Direct Upload system. Three buttons are shown on the User Identification screen: Veteran, Veteran Family Member or VSO/VA Business Partner



2.1 Veteran User Registration

The Registration Confirmation window is displayed. Fields shown in gray text are not editable and are specific to the Veteran logging in to Direct Upload. The 8 or 9-digit Veteran File Number must be entered.

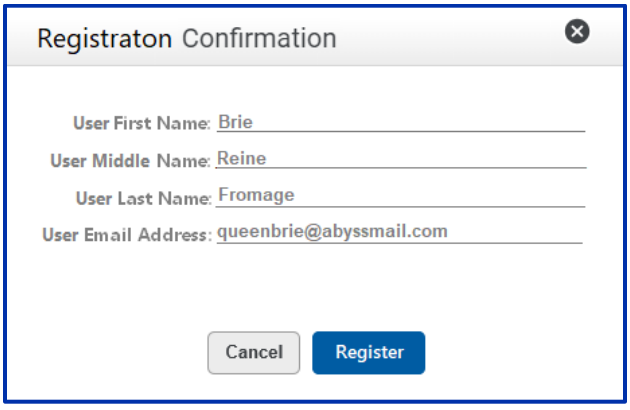


The Register button establishes the Veteran in the system.

2.2 Veteran Family Member Registration

The Registration Confirmation window is displayed. Fields shown in gray text are not editable and are specific to the Veteran Family Member logging in to Direct Upload.

The Register button establishes the Veteran Family Member in the system.



2.3 VSO/VA Business Partner User Registration

The Organization and Role window is displayed.

- VA Business Partners should select the Role closest to the function the user provides.
- VSOs should enter their 4-6-character Accreditation number if available. For those without accreditation numbers, please enter 0000 if prompted.
- Select the Organizations in the drop down to designate all appropriate entities.
  - If user's organization/company is not found, type the organization/company name on the Other line and click the Add button to record the information in the Organization listing.

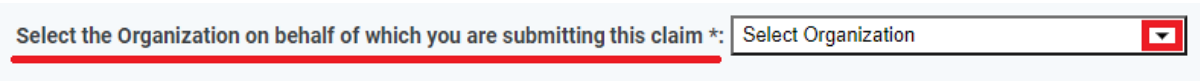
The Register button establishes Role and all Organizations identified for the user in the Direct Upload system.

3 Using Direct Upload

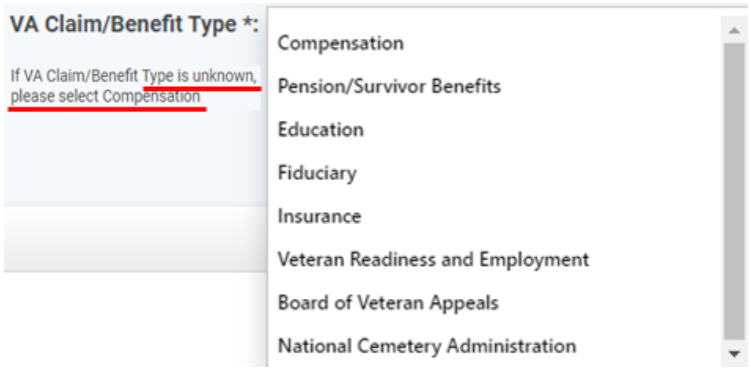
Now you are ready to begin submitting claims and evidence using Direct Upload!

Veteran and Veteran Family Member Users can request assistance and information from VA-accredited attorneys, claims agents, and VSO representatives trained to provide support for VA benefit claim submissions. The VA Office of General Counsel (OGC) maintains a list of authorized organizations and individuals on the VA Accreditation Search Page at https://www.va.gov/ogc/apps/accreditation/index.asp.

If you are a VSO/VA Business Partner User who belongs to multiple Organizations, select the Organization for which you are submitting the Veteran's DU claim documents. Contact the CM Portal Help Desk at dmhs_support@Leidos.com to add or remove Organizations.

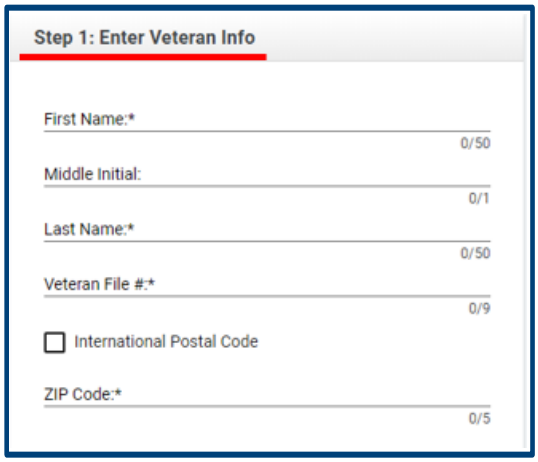


Indicate the VA Claim/Benefit Type (one per DU submission) to facilitate processing by the appropriate program. Select Compensation if the VA Claim/Benefit Type is unknown. The Organization and VA Claim/Benefit Type designations are required before proceeding to Step 1.

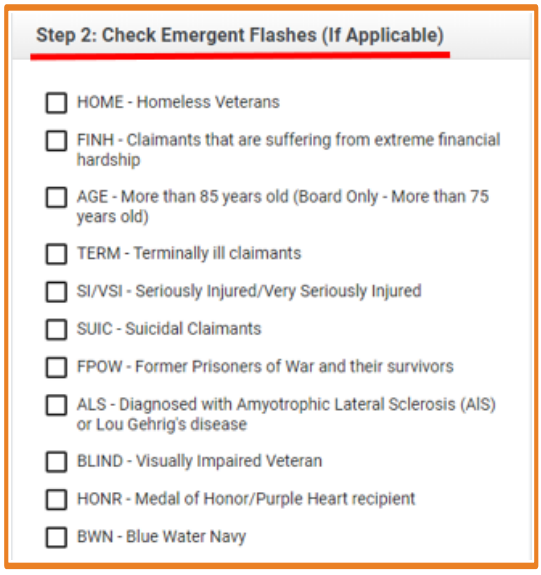


There are 4 steps to successfully submit documents via the Direct Upload tool.

Section 1: Submission

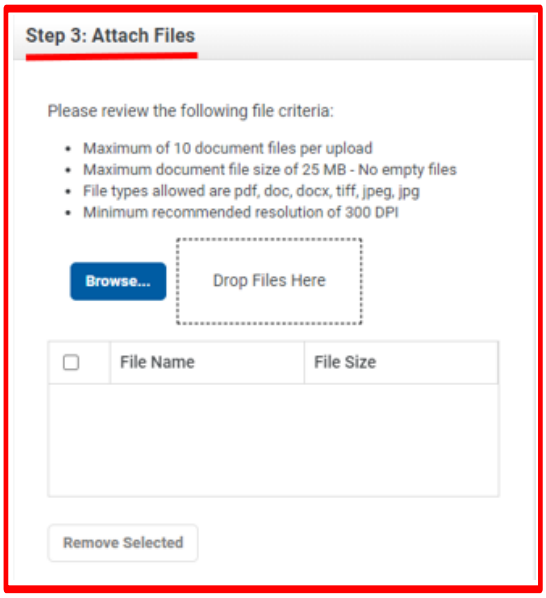


- Step 1: Fill out Veteran Information (blue highlight)



- Step 2: Check Emergent Flashes (if applicable) (orange highlight)

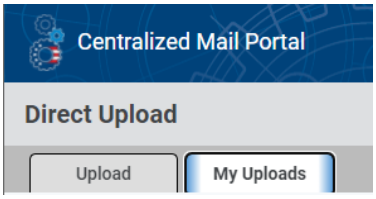
- Step 3: Attach Documents (red highlight)



- Step 4: Select "Submit" button to submit documents for processing

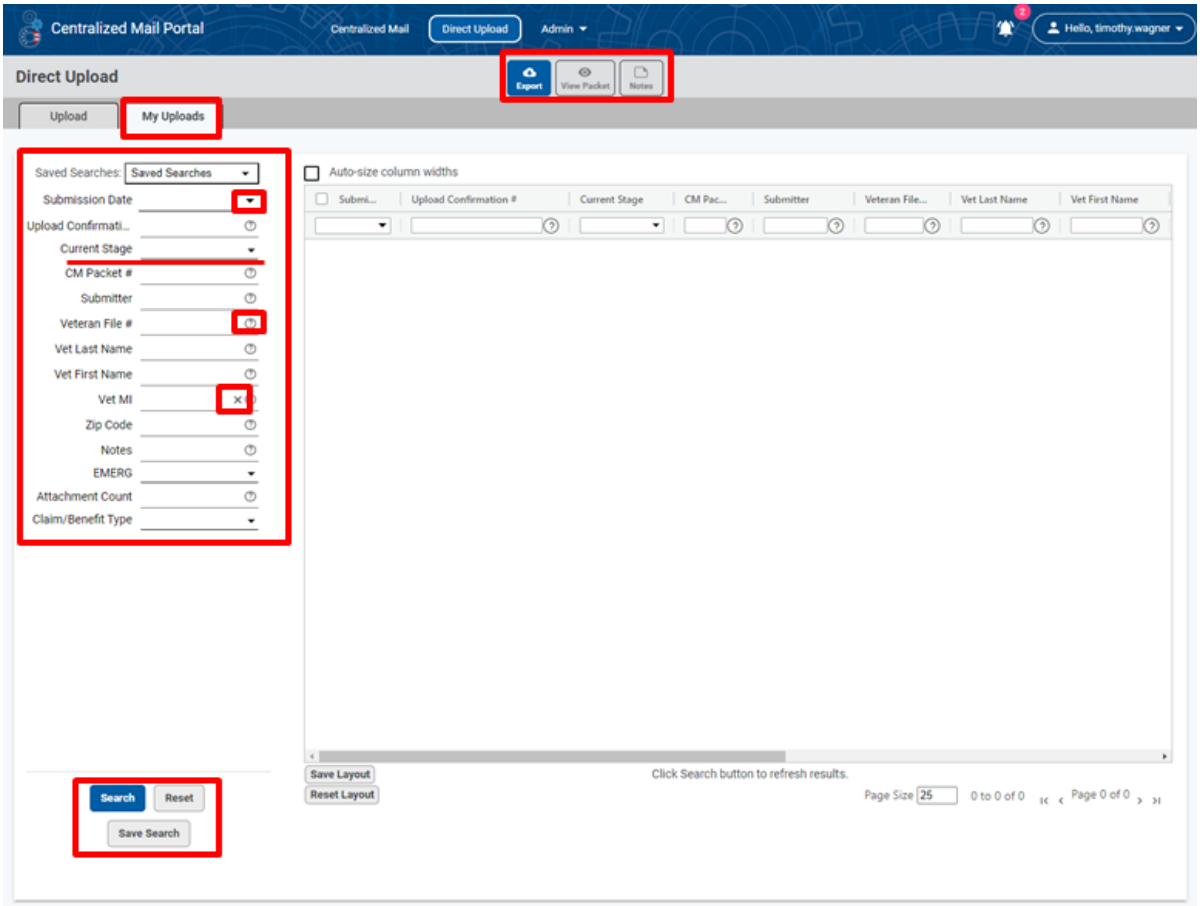
Section 2: Confirmation of Upload

- Step 1: Check email for the upload receipt with confirmation number
- Step 2: Monitor your email for packets that may have failed during processing and must be resubmitted
- Step 3: Check the "**My Uploads**" button to view your submissions.
    - Confirmation numbers will be visible once the submission has gone through the initial stage of the workflow



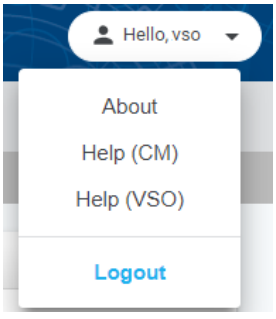
Section 3: Finding packets uploaded using Direct Upload

- Step 1: The Search function retrieves all packets that have been uploaded and match specific search criteria. Search Options symbols appear when clicking the Question Mark ⓘ icon. Fields with Down Arrows have an options menu. The Results Grid on the right side of the screen displays packets meeting the search requirements.



- Step 2: The Current Stage field identifies how far the packet has progressed through the CM Portal.
  - Uploading - Initial stage of submission transmission
  - Evidence Received - DU claim successfully uploaded and is ready for vendor processing
  - Vendor Processing - DU claim is converted into a CM Packet by the ICMHS vendor
  - Submission Failed – Resubmit - DU claim began ICMHS vendor processing but failed for various reasons Resubmit the claim after reading the Submission Failure Notification email.
  - Available in Mail Portal - Vendor processing is complete, and the packet is available in the CM Portal
  - Complete - Packet status is finalized

For more information, please download the Direct Upload Users Manual (VSO) found in the drop down on the upper right hand of the Direct Upload window under Help.



4 Direct Upload Frequently Asked Questions

1. ***What are the differences between the Benefits Intake API and Direct Upload?***
   The Benefits Intake API (also known as Direct Submit or other names designated by the claims management system vendor) works with various claims management systems to submit claims and evidence to VBA electronically.

   A claims management system is used by VSOs to keep track of Veteran data and submissions to VA. Claims Management systems may be licensed from third party sources, such as VetPro, VetraSpec, eVetAssist or Micropact (to name a few) or they may be developed internally by your Veterans Service Organization or company. Typically, third party sources will have a fee for those using their systems. These fees are negotiated with each organization and the VA is not involved. The Benefits Intake API allows claims and evidence submissions to be a maximum size of 100MB for each document and up to 50 documents per submission.

   Direct Upload is an electronic claim and evidence submissions tool made available by VBA to Veteran Representatives, Veterans, their Families, and other third parties. There is no fee to use Direct Upload. Direct Upload enables individuals to submit claims and evidence up to 10 documents per submission with a maximum size of 25MB for each document. Direct Upload can be accessed using a PIV card on the VA network or with ID.me credentials if not on the VA network and is available for anyone to use.

2. ***Who can use Direct Upload?***
   - Any Veteran Representative, including Veteran Service Officers and their staff with PIV cards and VA network access or the appropriate ID.me credentials can use Direct Upload. Accreditation is not required to use Direct Upload.
   - Legal organizations supporting Veterans, including attorneys, paralegal and office staff can use Direct Upload.
   - VA staff can use Direct Upload to submit documents received by electronic means to the Centralized Mail portal.
   - Veterans and their Family Members can upload claims and evidence mail directly to the claim's intake center. A notice is provided to Veterans and family members to be sure to work with their Veteran Representative to ensure their documents are accurate and complete before submission. Veterans will not have the ability to see the documents they upload in VBMS.
   - VBMS access rules are not changing.

3. ***How do I log in to Direct Upload?***
   There are two ways to log in to Direct Upload. Direct Upload can be accessed using a PIV card on the VA network or with ID.me credentials if not on the VA network. Other log in methods such as DS Logon are not enabled with Direct Upload.

   - If you are using a PIV card to log in to Direct Upload and are on a VA network, go to: https://dmhs.digitalcontentservices.com.
   - If you are using ID.me credentials to log in to Direct Upload, go to: https://eauth.va.gov/accessva/ and select the correct user type to log in.

- If you experience problems logging in to Direct Upload using a PIV card, please email: dmhs_support@leidos.com.
- If you experience problems logging into Direct Upload with your ID.me credentials, please submit a ticket at: https://lgy.va.gov/lgyhub/help.

4. ***I downloaded the ID.me app to my cell phone for veteran's discounts during online purchases. Can that app be used for this purpose too?***
   ID.me credentials can be used to access Direct Upload after you verify your group affiliation with VA.gov on the ID.me website. Go to your ID.me My Account page to select a government affiliation.

5. ***As a VSO and a veteran, do I create two ID.me accounts - one personal, one business?***
   No. A person can only have one ID.me account and user credentials. From a Direct Upload perspective, there is no differentiation between different accounts.

6. ***Should office staff (including paralegal and other non-accredited staff) create their own account or use their supervisor's account?***
   Each person who logs in to Direct Upload should use their own authorized credentials. Only that individual will be able to see the documents they upload.

7. ***During Registration, what should I enter for the accreditation number if I am not an accredited VSO?***
   Enter 0000 as the accreditation number of you are registering as a VSO but are not accredited.

8. ***How long does it take for Direct Upload submissions to reach VBMS?***
   For mail belonging to the Veterans Benefits Administration, Direct Upload submissions will be processed and uploaded to the Centralized Mail portal in less than 6 hours and will be uploaded to VBMS in another 1-2 days. Very large documents or submissions with very complex claims and evidence may take longer. Material submitted through Direct Upload for the Board of Veterans Appeals fall outside the turnaround times described above.

9. ***What do we if we get a confirmation number following Direct Upload, but the records do not show in VBMS even after 2 weeks?***
   If a submission does not show up in VBMS right away, several things may be occurring:
   - For a third party to see documents in VBMS, the appropriate Power of Attorney must be in place giving that third party the right to see those documents (no matter who submits the documents via Direct Upload). i.e. the documents may be in VBMS but may not be visible to a Veteran Representative who does not have the appropriate POA in place.
   - If the submission contains BVA documents, the packet follows a different process which may take longer than the current VBA turnaround times.
   - VBA has made it a priority to reduce the amount of time it takes for Direct Upload submissions to be processed, aiming for same day processing whenever possible.

10. ***Do I use Direct Upload to submit documents to the Board of Veterans Appeals (BVA)?***
    Yes, the Board of Veterans Appeals recently approved the use of Direct Upload for the submission of Appeals and related documentation.

11. ***Should you still be checking the status of the submission if you see it uploaded in VBMS?***
    Once a document reaches VBMS, no further updates will be made to the packet status in My Uploads.

12. ***Will documents be maintained as submitted (i.e., memo with attachments) or broken up? What is the best, most recommended way of linking multiple submissions that are too large for one upload?***
    Grouped documents are those documents bound or fastened together and are typically sent on the same day. To the extent possible, grouped documents shall remain intact and be identified in accordance with the Document Type Identification and Date of Receipt Guide. Documents with different document types will generally be uploaded as separate documents. If you are uploading a significant number of large documents, please place VA forms near the front of the document set. We have found that VA Forms found in the middle of hundreds of page of other documents, may be processed incorrectly. Retaining grouped documents throughout processing supports date of receipt integrity for the specific group of documents where applicable.

13. ***I have submitted claims during the last few days of the month which have shown up in VBMS with dates of receipt in the next month. How do we get this corrected to ensure the earliest possible effective date? Is the date of receipt for uploaded documents set based on the local time?***
    If submitted claims are in VBMS with an incorrect date of receipt, please email VCIP.VBACO@va.gov with the confirmation number and the details of the submission. The submission will be reviewed and if it is determined an incorrect date of receipt was applied, the date of receipt will be revised. If the date of receipt is correct in Direct Upload, then we advise reaching out to your local RO POC or Change Management Agent for resolution.

14. ***Will Direct Upload document our submission date, even if it takes days to get into VBMS? Is the date of receipt for uploaded documents set based on the local time?***
    The date of receipt, or submission date, is set on the day that the submission is successfully received in Direct Upload. This date will be maintained throughout processing and in VBMS. The date of receipt is captured in local time but uses Central Time zone when uploaded to VBMS.

15. ***Is there a way to save a veteran's identification information for reuse multiple times?***
    For Veteran's using Direct Upload, their identification information is pre-populated in Direct Upload. For other users, Veteran information is not maintained since the expectation is that Veteran Representatives will be uploading claims and evidence for multiple Veterans.

16. ***We have had claims in the past, that once we submit a claim and it is received, the claim has been lost from there and the VA does not honor the confirmation number.***
    When a submission reaches the Evidence Received stage and the documents are available in the user's My Uploads page, the submission has been received and will be honored by the VA. If a Submission Failed or Submission Rejected – Resubmit message is received, the submission failed during processing. Most often the failure is a result of documents containing multiple layers, is password protected, or is corrupt and must be resubmitted. Depending on the reason for failure, the submission date of receipt may or may not be honored.

17. ***Is there policy where the VA must accept the effective date if there is an upload error?***
    There is no policy stating the VA must accept a date of receipt if there is an upload error. If a Submission Failed or Submission Rejected – Resubmit message is received and the error is due to a user issue, the date of receipt

will not be honored. If the error is due to a VA or tool error, the date of receipt may be honored. Users should contact their local RO POC or Change Management Agent with the details of the submission and the error, and the appropriate business line will make the decision regarding the date of receipt.

18. ***Do you know if the Pension Management Center plan to go Direct upload at the end of the year?***
    The Pension Management Center has been supported in Direct Upload for several years.

19. ***Is there a way to delete an upload or document if submitted in error while still in process?***
    There is currently no way to delete a document or complete submission in the Direct Upload tool. Each mail packet is reviewed for accuracy and should be corrected once processed. If needed, please contact your local RO POC or Change Management Agent for assistance with an incorrect submission.

20. ***Tips for submitting documents to Direct Upload:***
    - Evidence Intake Cover Sheet is not required
    - Black and white documents work best in Direct Upload; however, color photographs and DD214 documents are accepted and will be uploaded to VBMS in color.
    - Highlighting does not work well when documents are converted for upload to VBMS
    - Be sure to use high quality settings when scanning documents in as lower quality originals will often have image quality issues in VBMS.
    - Very large documents and very large packet sizes cause delays in processing. Be aware of the number of pages in your submission and the size of the documents and separate into multiple packets to ensure quicker processing.

21. **What if I don't know what type of VA Claim/Benefit Type I am submitting?**
    Select Compensation as the Claim/Benefit type if you are unsure which type of document you are submitting. Most documents submitted are Compensation related so Compensation is the default.