

# STAKEHOLDER ENTERPRISE PORTAL

## USER GUIDE



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❖ Indicates that the SEP feature is available only to Accredited VSO Users at this time.

# 1.0 Overview

Veterans Relationship Management’s (VRM) Stakeholder Enterprise Portal (SEP) provides a fully functional and secure entry point for external stakeholders, business partners and service providers to access web-based systems, information and services on behalf of Veterans and the Department of Veterans Affairs (VA). SEP establishes a common enterprise identification and authentication service for VA internal and external stakeholders and provides a portal for VA enterprise stakeholders to manage enterprise content.

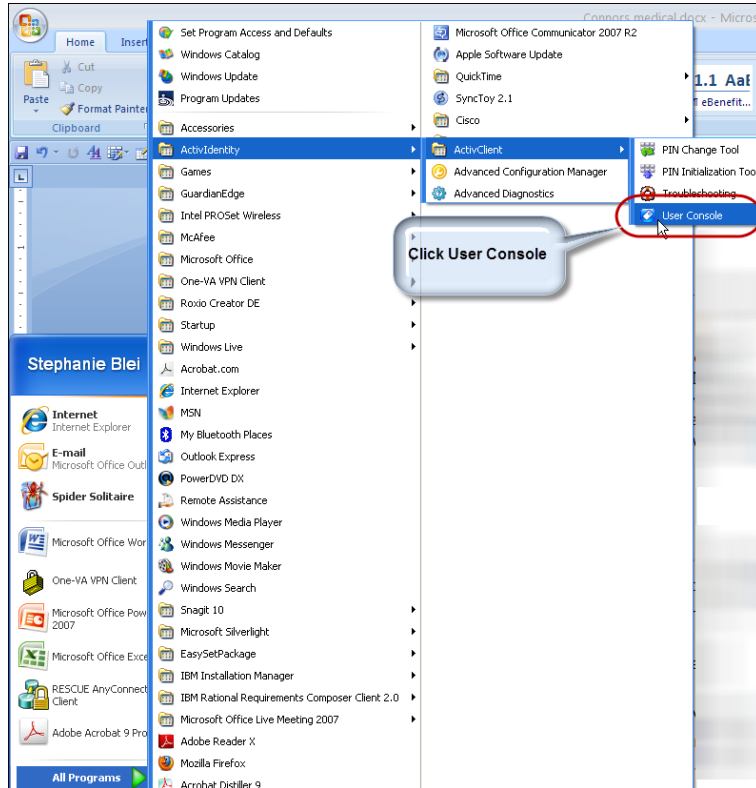
This manual is a step-by-step guide on SEP features. We recommend that you check periodically for guide updates to ensure that you learn of new features as they become available. **For further information and other issues not covered in this user guide, please call the SEP dedicated support line at 1-855-225-0709, or work with the Change Management Agent (CMA) in your local [Regional Office \(RO\)](#).**

[Do you need more help with topics in this user guide? Click here to check out the SEP FAQs.](#)

## 1.1 Pre-Check Hardware, Software, and Identification

SEP has the below minimum hardware and software requirements for full functionality:

1. Operating Systems: Windows XP or Windows 7
  - How to check: Right Click “My Computer” → Select “Properties.” This may vary by Operating System.
2. Web Browsers: Internet Explorer (IE) v9, v10, v11, Firefox, or Google Chrome
  - How to check: Open Internet Explorer. Click onto “Tools” → Select “Help” → Select the “About” icon to display your IE version. This may vary by Web Browser.
3. ActivIdentity (v 6.2 for Windows 7) card reading software (Required only for users logging in with a PIV card.):
  - How to check: Select “Start” → Select “All Programs” → Find “ActivIdentity” → Find “ActivClient” → Select “User Console” and double click to open the program → Select “Help” from the title bar → Select “About” and find ActivIdentity.



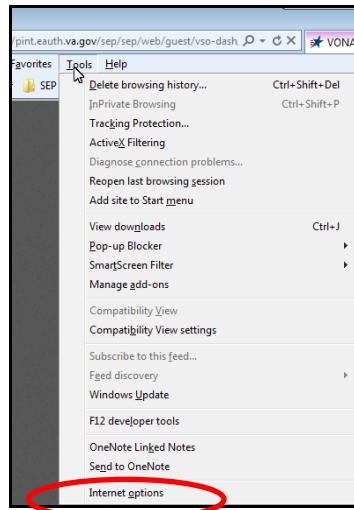
4. Valid Personal Identity Verification (PIV) card and Personal Identification Number (PIN) for the PIV Card. (Required only for users logging in with a PIV card.)
5. PIV card reader slot located on the side of laptop, on the keyboard of a desktop, or external connected by USB. (Required only for users logging in with a PIV card.)
6. Use the following instructions to obtain your Office of General Counsel (OGC) Accreditation number:
  - Link to or copy URL (<http://www.va.gov/ogc/apps/accreditation/index.asp>) into your Web browser. Select the appropriate type of person, enter your last name into the last name field, and select the "Search" button.
  - In the OGC Database, click onto your name to obtain your Accreditation number. Copy or retain the Accreditation number. When you log into SEP, you will enter the number in the OGC Accreditation field.
  - Users who cannot access the OGC database to obtain their Accreditation number should contact the OGC at [ogcaccrreditationmailbox@va.gov](mailto:ogcaccrreditationmailbox@va.gov).

## 2.0 Clear your Cache

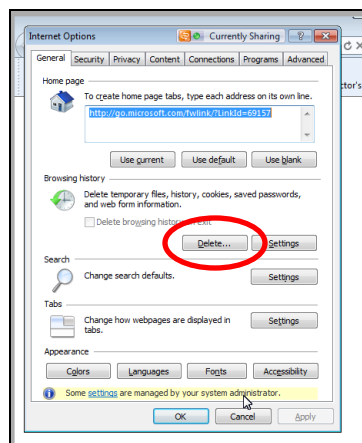
To ensure security and protect privacy, you should clear your Web browser cache or history daily.

Follow the below instructions to clear your Web browser cache or history in Internet Explorer:

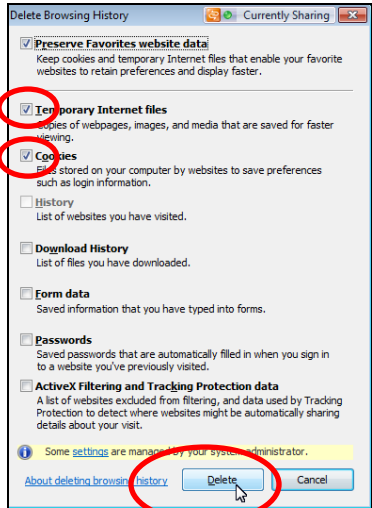
1. Open Internet Explorer.
2. From the top menu, click onto “Tools” and select “Internet Options.”



3. Select “Delete.” (The Delete function will clear the history, cookies, and cache in your Web browser.)



4. External network (non-VA) users should select the appropriate check boxes and click onto the “Delete” button. Note that VA’s secure network does not permit its users to delete Web browser history.

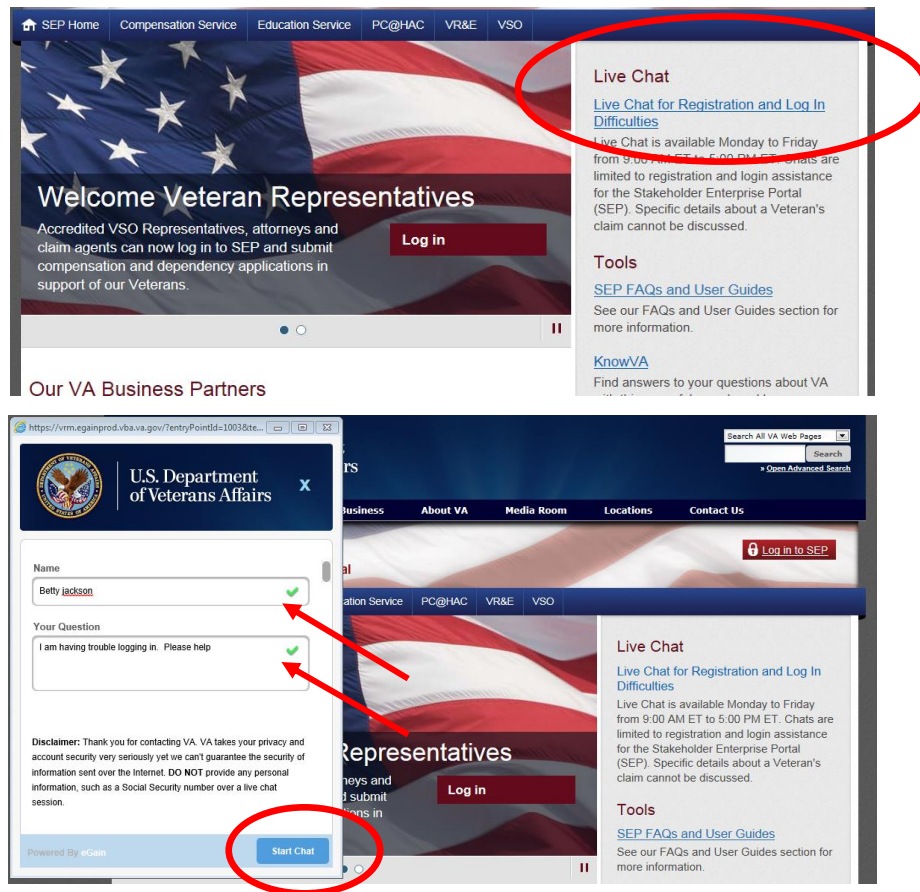


5. Exit the popup screen.

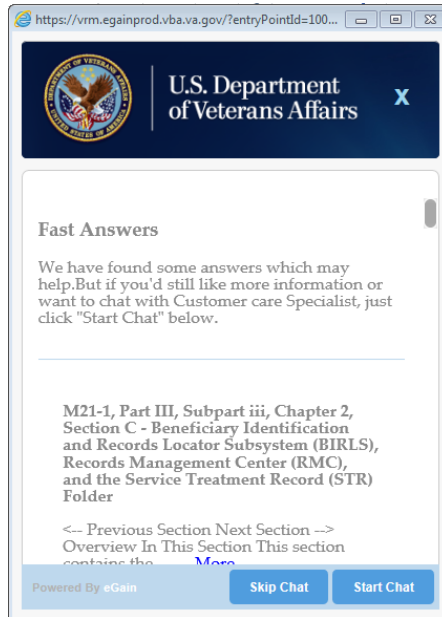
## 3.0 Unauthenticated Chat

The unauthenticated chat feature allows SEP users to communicate directly with National Call Center agents during their online session. The unauthenticated chat feature allows users to ask general questions while the users are not logged in to SEP. Note that the users should not provide sensitive or Personally Identifiable Information (PII) during an unauthenticated chat session. A SEP user can initiate a chat session with a National Call Center agent for assistance when selecting a page on SEP where an unauthenticated chat window is available.

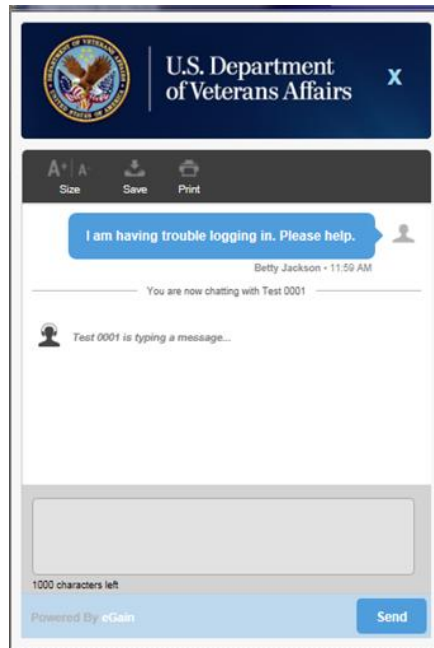
1. When accessing the SEP Home Page, click onto the link, “Live Chat for Registration and Log in Difficulties.” A separate chat box will appear.



3. Enter your name and question into the applicable text boxes and click onto “Start Chat.” The Chat window will first direct you to Fast Answers, in which the user may find the answer to a question without chatting with a representative. If the user does not find the answer they are looking for, the user can click “Start Chat” to proceed to chatting with a live National Call Center agent.

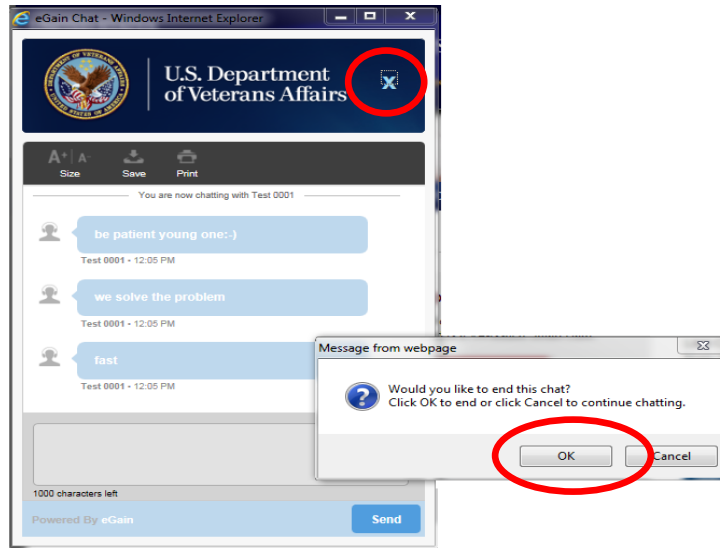


**NOTE:** SEP users and chat agents should not enter Personally Identifiable Information (PII) (e.g., Social Security Number or date of birth) into the chat window.

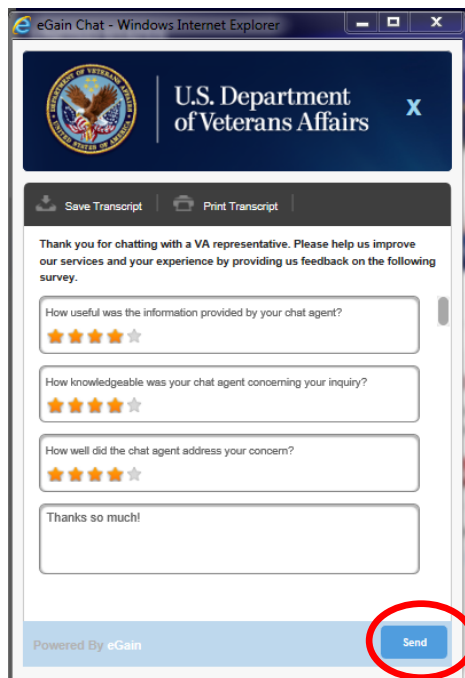


4. A chat agent will receive the message and initiate contact with the user.
5. To finish a chat session, click onto the large 'X' located at the top of the chat window, and confirm your intent to close the session by clicking "OK" in the popup window.





6. To help us improve SEP chat, we ask users to complete a survey. After completing the survey, click onto "Send" button.



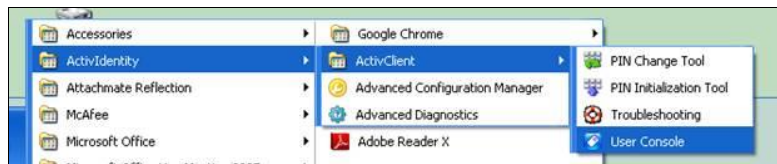
## 4.0 Create an Account and Log In

Accredited users can use their Personal Identity Verification (PIV) cards or Norton Symantec Remote Identity Proofing process to create accounts. Users may find Symantec login procedures by [clicking here for the Symantec Job Aid page](#).

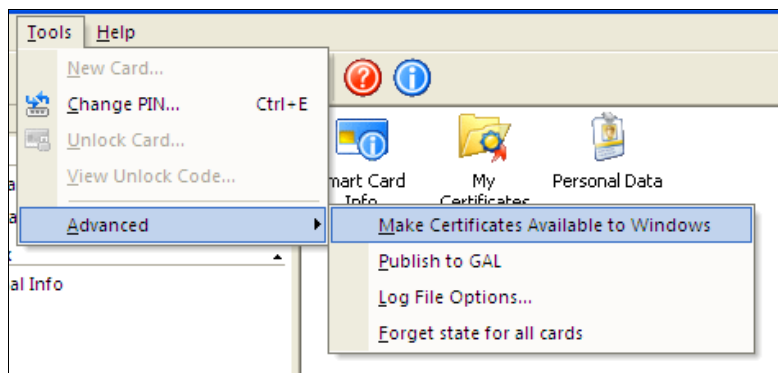
### 4.1 Register a PIV

We recommend that you ensure that your PIV card and PIN function properly prior to registering your PIV Card. To ensure that your PIN card and PIN function, insert your PIV card into the PIV card reader, enter the PIN associated with your PIV card, and log in or unlock your VA Windows Domain user profile. If your PIV and/or PIN do not function properly, please work with your PIV Sponsor or the local PIV office to resolve any problems before moving forward with registering your PIV card.

1. Insert your PIV card into your card reader.
2. Launch the ActivClient console from the Windows Start menu.

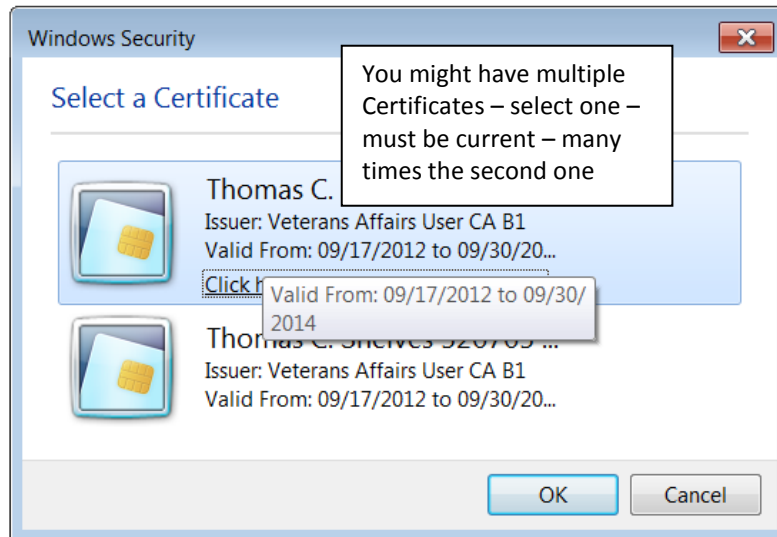


3. Click on “Tools” → “Advanced” → “Make Certificates Available to Windows.”




4. Close ActivClient.
5. Launch your Web browser and link to or copy and paste (<https://register.eauth.va.gov/>) into the Web browser.

6. You will be asked to choose a certificate. Hover your mouse over your name and select the certificate that states “PIV Authentication.” Click “OK.”



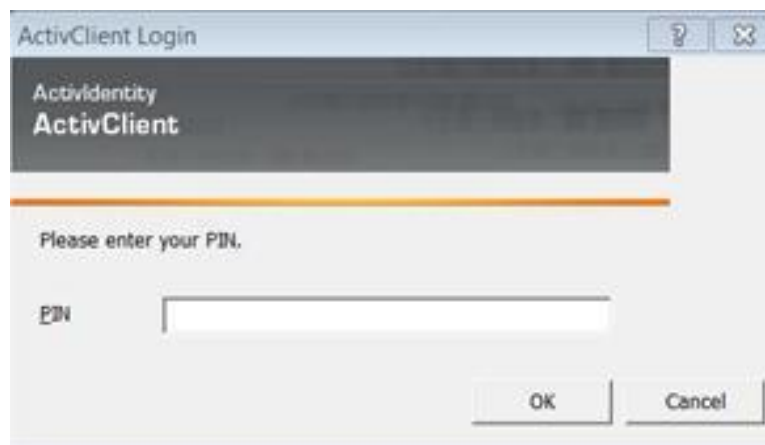
- **Helpful Hints:**

- Do not select a certificate that displays a  symbol. Select only a

certificate that displays a  symbol.

- If you receive an error with one certificate, try another certificate.

7. Enter your PIV PIN and click the “OK” button.



8. Click “Register Smart Card” on the right-hand side of the screen.



9. After a successful registration, your name and a message indicating successful registration will appear on the left-hand side of the page.



- When logging into SEP, should you receive the error screen below, clear your cache (Section 2.0), close your Web browser, and reattempt your PIV card registration (Section 4.1). If you continue to receive the same error message, contact the SEP dedicated support line at 1-855-225-0709, or the Change Management Agent (CMA) in your local Regional Office (RO) to resolve the problem.

[skip to page content](#)

U.S. Department of Veterans Affairs PIV/DoD CAC CSP No PKI

U.S. Department of Veterans Affairs PIV/DoD CAC CSP No PKI

This U.S. Government Public Key Infrastructure (PKI) Credential Service Provider (CSP) only accepts Department of Veterans Affairs (VA) Personal Identity Verification (PIV) cards and Department of Defense (DOD) Common Access Card (CAC) for authentication. If you have a valid VA PIV card or DoD CAC, you must register at [here](#).

WARNING NOTICE:

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This site is intended for use by the public for viewing and retrieving public information only except as otherwise explicitly authorized. VA information resides on and transmits through computer systems and networks funded by VA; all use is considered to be understanding and acceptance that there is no reasonable expectation of privacy for any data or transmissions on Government networks or systems. See <http://www.va.gov/privacy> for further information on privacy. All transactions that occur on VA systems other than the viewing and downloading of information on VA websites may be subject to review and action including (but not limited to) monitoring, recording, retrieving, copying, auditing, inspecting, investigating, restricting access, blocking, tracking, disclosing to authorized personnel, or any other authorized actions by all authorized VA and law enforcement personnel. The use of this system constitutes the understanding and acceptance of these terms. Unauthorized attempts or acts to either (1) access, upload, change, or delete information on this system, (2) modify this system, (3) deny access to this system, or (4) accrue resources for unauthorized use on this system are strictly prohibited and may be considered violations subject to criminal, civil, or administrative penalties.

Quick Links

- [Register PIV or CAC](#)
- [VA Help Desk](#)

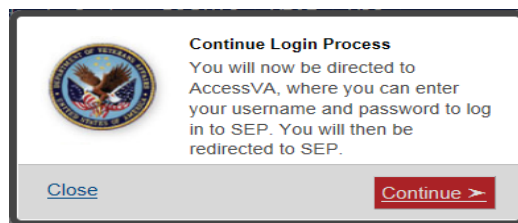
U.S. Department of Veterans Affairs - 810 Vermont Avenue, NW - Washington, DC 20420

10. Close the Web browser.

## 4.2 Register with Remote Identity Proofing: Obtain Norton Symantec Credentials

As an alternative to using a PIV card to log into SEP, you may log into SEP with Norton Symantec credentials.

1. To start the process of credentialing through Symantec, click the following link or copy and paste the URL into a new Web browser: <https://www.sep.va.gov>
2. Click onto the login button. You will be prompted with a pop-up detailing the Login Process. Click to "Continue" to proceed.



3. The SEP login page will appear. Click onto the "Register" link located under "Log in with Norton Symantec."



The application, **SEP**, allows the following CSPs for you to select from:

#### VA PIV Card

VA Personal Identity Verification (PIV) card is a smart card issued to VA Federal employees and contractors.

Log in with  
VA PIV Card

[Register](#) | [Learn More](#)

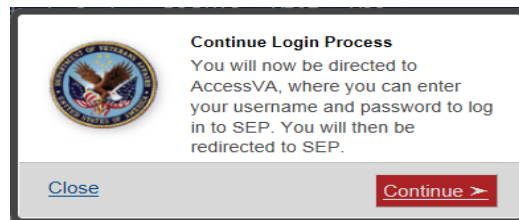
#### Norton Symantec

Norton Symantec accounts are issued to any user requiring identity verification to access VA websites and online services.

Log in with  
Norton Symantec

[Register](#) | [Learn More](#)

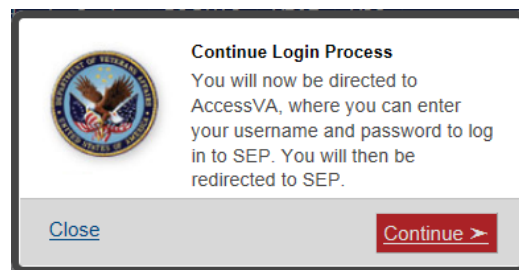
4. You will again be prompted with a pop-up detailing the Login Process. Click to “Continue” to proceed. The Norton Symantec account sign-in page will appear.




To complete the Symantec registration process, [click here for the Symantec Credential User Guide](#).

## 4.3 Log in as a SEP User

1. Click the following link or copy and paste the URL into a new Web browser:  
<https://www.sep.va.gov>
2. Click onto the login button. You will be prompted with a pop-up detailing the Login Process. Click to “Continue” to proceed.

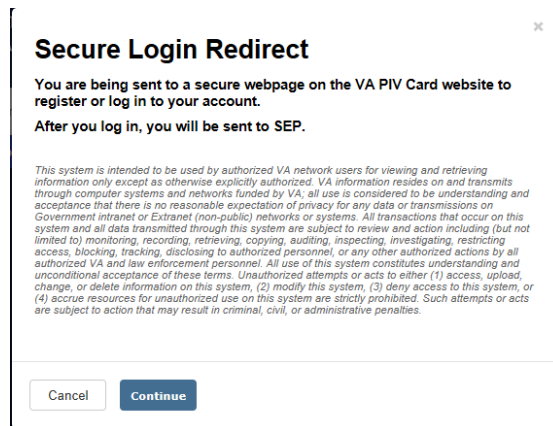


3. The SEP login page will appear.

 The application, **SEP**, allows the following CSPs for you to select from:

<b>VA PIV Card</b> VA Personal Identity Verification (PIV) card is a smart card issued to VA Federal employees and contractors.	<b>Log in with VA PIV Card</b> <a href="#">Register</a>   <a href="#">Learn More</a>
<b>Norton Symantec</b> Norton Symantec accounts are issued to any user requiring identity verification to access VA websites and online services.	<b>Log in with Norton Symantec</b> <a href="#">Register</a>   <a href="#">Learn More</a>

- Note that when you click your respective log in button, you will be prompted with a Secure Login Redirect pop-up. Click “continue” to proceed with your log in.



4. If you log in with a PIV card, SEP will ask you for your PIV credentials and PIN number via ActivClient. If you log in through Symantec, the system will redirect you to the Symantec login page where you may provide your Symantec login credentials.
5. When logging into SEP with your PIV card and PIN, should the screen below appear, clear your cache ([Section 2.0](#)), close your Web browser, and reattempt your PIV card registration ([Section 4.1](#)). If you continue to receive the same error message, contact the SEP dedicated support line at 1-855-225-0709 or the Change Management Agent (CMA) in your local Regional Office (RO) to resolve the problem.

[skip to page content](#)

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Quick Links

- [Register PIV or CAC](#)
- [VA Help Desk](#)

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U.S. Department of Veterans Affairs - 810 Vermont Avenue, NW - Washington, DC 20420

6. After your first login attempt, the below VA User Account Confirmation screen will appear, where you must complete information that is required for you to access SEP. Note that first, middle, and last name, and e-mail address and country are read from your PIV card. If information is incorrect, please resolve the inaccuracy with your PIV Sponsor or local PIV office.
  - Helpful Hint: The Date of Birth format is mm/dd/yyyy.





IAM Health - Benefits - Burials & Memorials - About VA - Resources - Media Room - Locations - Contact Us -

AccessVA Home | About | Help & Support

## VA User Account Confirmation

We need help with confirming your PKI CSP information with our records

- The information below is what is provided by PKI CSP log in.
- To complete the process we need you to provide the additional required information.
- This process will improve your VA user experience and security while accessing information on the Stakeholder Enterprise Portal website.
- You can complete this later. All users will have to complete confirmation by **May 1<sup>st</sup> 2015**.

Confirming your account is only required once for each different credential you use.

**Name**

**First Name\***

Your First Name

**Middle Name**

Your Middle Name

**Last Name**

Your Last Name

**Person**

**Gender\***

Home or Cell Phone #\*

**Email\***

Your Email Address

**Date of Birth\***

**Home Address**

**Street Address\***

**City\***

**State\***

**Zip Code\***

**Country\***

United States

**Identification**

**SSN\***

Fields marked with an asterisk (\*) are required.

The fields that are not editable were provided by PKI CSP. Please contact PKI CSP if you desire to update the non-editable information. For more information on updating PKI CSP information please [Click Here](#)

I'll do it later Submit

Related Links: [Our Privacy Policy](#)

7. After completing the VA User Account Confirmation, you will receive the following confirmation message.

IAM Health - Benefits - Burials & Memorials - About VA - Resources - Media Room - Locations - Contact Us -

AccessVA Home | About | Help & Support

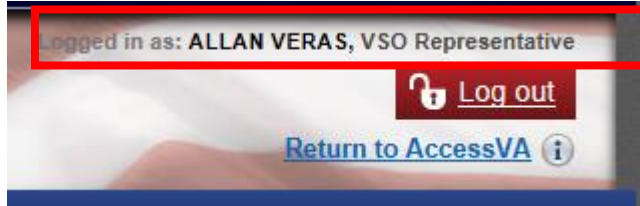
VA User Account Confirmation

Thank you for confirming your VA user account. Your confirmation helps the VA improve your online experience and security.

To complete this process please click 'OK' to log back in.

**OK**

8. Click onto the **OK** button. The system will return you to the login screen, where you must log into SEP (Section 4.3) in order to continue your session.
9. After successfully logging in with either PIV or Symantec credentials, the system will direct you to the SEP web application corresponding to your user role: VSO, Claims Agent or Attorney. Your role will appear in the upper right hand corner of the SEP browser screen.



10. The SEP welcome page should appear. Enter your OGC Accreditation number. (Refer to [Section 1.1](#) of this guide for instructions on how to obtain your OGC Accreditation number.)

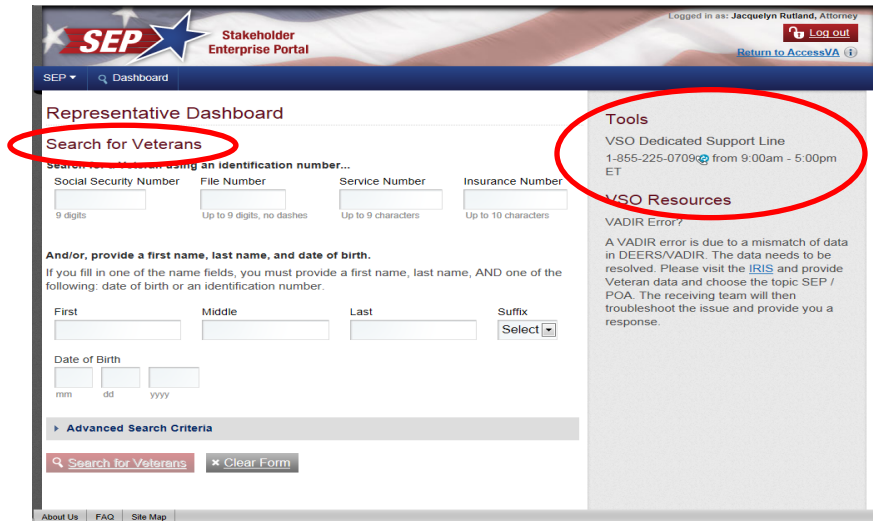


11. Click onto the “Continue Registration” button. The screen should display all of your user roles and POA associations.



12. Click on the “Finish Registration” button.

13. After logging into SEP, the Dashboard screen seen below should appear where you may search for Veterans. (Should you need assistance while conducting a search, contact the SEP dedicated phone number located in the upper right-hand corner of the page.)



Need more help? [Click here to check out our FAQ's on SEP Login.](#)

Users having trouble with registration or with logging in with a PIV card should call the National Service Desk at 855-673-4357, and, when prompted by the automated menus, select Option 6 for specialty services and Option 2 for PIV support.

## 5.0 Manage Form 21-22

1. Accredited VSOs will use SEP to manage electronic 21-22 requests if the VSO is authorized to accept or decline POAs.
2. To search for, manage, or review incoming 21-22s, the accredited user should select the “Representation Requests” option located in the upper navigation bar.



### 5.1 Search for 21-22s

The Representative Requests search function enables an accredited VSO user, using search criteria, to find 21-22s submitted by Veterans who requested the VSO organization as their representative. To make multiple selections, hold the Ctrl key while clicking selections.

A screenshot of the 'Representation Requests' search interface. The page has a dark blue header with navigation links: 'SEP', 'Dashboard', 'Representation Requests', and 'VSO Work Queue'. The main content area is titled 'Representation Requests' and contains a search form. The form has two main sections: 'Search For Representation Requests' and 'Use a Saved Search'. The 'Search For Representation Requests' section includes three dropdown menus: 'Requested Organization\*' (set to 'American Legion'), 'Requested Status\*' (set to 'Accepted'), and 'Claimant's Location Type' (set to 'Select All'). A red 'Find Requests' button is at the bottom left. The 'Use a Saved Search' section has a text box and a 'Select a link below to populate the search form with previously saved search criteria.' The right sidebar contains 'Tools' (VSO Dedicated Support Line) and 'VSO Resources' (VADIR Error?).

#### Helpful Hints:

- “Requested Organization” and “Requested Status” are required fields to conduct a search.
- If the VSO user represents only one organization, the organization will automatically appear, and the VSO user will not be able to select additional organizations.

- You can search 21-22s using five “Request Status” criteria. There are four non-withdraw types (Accepted, Declined, New, Pending) and one withdrawn type (Withdrawn POA).
  - You may search one or more non-withdrawn types at a time.
  - You may not search both non-withdrawn and withdrawn types at the same time. (Withdrawn POA is a mutually exclusive search criterion)

- When searching for New, Pending, Accepted, or Declined 21-22s, you can improve your search results by selecting Domestic, Military, or International Locations as search criterion. In addition, if you select a U.S. state, you may use the city name (or multiple city names, separated by commas) to improve your search results. If selecting multiple states, hold the Ctrl button located on the keyboard when selecting each state.

- When searching by Military Location, you must select both the Claimant’s Post office and the Claimant’s Postal Code. To select multiple selections, hold the Ctrl key while clicking selections.

- When searching by the location type “International,” you will improve your search results if you use the Claimant’s Country as a search criterion. To select multiple selections, hold the Ctrl key while clicking selections. To select all International Requests, click on the “Select All” button.

- You must use valid search criteria to receive successful search results for Veterans who have requested POA (21-22s) and/or withdrawn POAs (21-22s).
- For 21-22s requests, search results will return information about the Veteran or Claimant, Limitations of Consent (if applicable), (VSO decision) Request Status, and, when the VSO has accepted the Veteran’s request for POA, the responsible VSO representative name and decision date.

Request Search Results  
Showing 1 - 25 of 11,399 Search Results Save This Search

Veteran/Claimant Info	City	State	Military Post Office	Military Postal Code	Country	Zip Code	Date Received	Request Status	Limitations of Consent
<a href="#">VETERAN_EXAMPLE1</a> Claimant: (Self)	BURKE	VA			USA	22015	02/17/2013	Accepted Accepted on 02/17/2013 by Example VSO	None
<a href="#">VETERAN_EXAMPLE2</a> Claimant: (Self)	CHESAPEAKE	VA			USA	23322	02/17/2013	Accepted Accepted on 02/17/2013 by Example2 VSO	Address-Related
<a href="#">VETERAN_EXAMPLE3</a> Claimant: (Self)	KENSINGTON	MD			USA	20895	02/17/2013	Accepted Accepted on 02/17/2013 by Example3 VSO	None

- To open the 21-22 Detail page within the Request Search Results, click onto the Veteran’s name.
- SEP users cannot view the detail page of a Veteran or Claimant who has a withdrawn POA request (e.g., when a Veteran removes the VSO organization as his/her POA or requests a POA through another VSO organization).

## Request Search Results

Save This Search

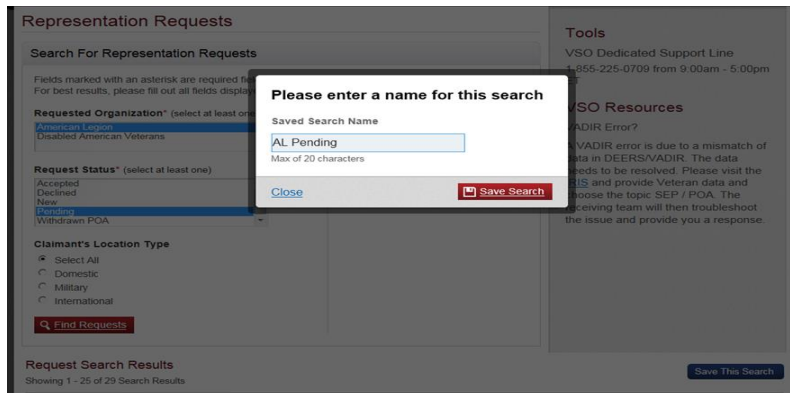
Showing 1-2 of 2 Veteran Search Results

Veteran/Claimant Info	Date Received	Status	Limitations of Consent
Russell, Jose Gary Claimant: (Self) Address	NA	Withdrawn Withdrawn on 01/29/2013	NA
Little, Thomas J Claimant: (Self) Address	NA	Withdrawn Withdrawn on 01/29/2013	NA

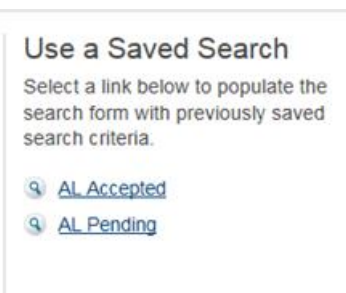
## 5.2 Save a Search / Recall a Saved Search

Accredited SEP users will find it helpful to save frequently-used searches for easy referral.

1. After conducting a search, select the “Save Search” option, name the search, and save it to your list of saved searches.



- You can save up to ten (10) searches that only you who saved the search can view.



2. To recall the parameters of a saved search, select the saved search on the right of the search form.
  - Because the pre-populated search form stored the saved search criteria, you may re-run a search without reentering the search criteria.

Fields marked with an asterisk are required fields.  
For best results, please fill out all fields displayed.

**Requested Organization\*** (select at least one)

American Legion  
Disabled American Veterans

**Request Status\*** (select at least one)

Accepted  
Declined  
New  
Pending  
Withdrawn POA

**Claimant's Location Type**

Select All  
 Domestic  
 Military  
 International

### Use a Saved Search

Select a link below to populate the search form with previously saved search criteria.

[AL Accepted](#)

[AL Pending](#)

3. You are limited to up to ten (10) saved searches. To delete saved searches, hover your mouse over the saved search name and select the "Delete" button.

## 5.3 View 21-22 Detail

1. The accredited VSO user can use the 21-22 detail page to research issues and make informed decisions. The detail page includes the following information: Veteran information, Claimant Information, Limitations of Consent, Change of Address, etc.

### Detail for: 6/30/2012 New Request

Capone, Anthony Jay requesting AMVETS

Action:  -OR-  [Go back to search results](#)

Claim Information	
Date Request Received	6/30/2012
Request Status	New
Sharing of PHI	Not Authorized
Limitations of Consent	Drug Abuse, Infection with HIV, Sickle Cell Anemia
Change of Address	Not Authorized
Veteran Information	
Veteran Name	Capone, Anthony Jay
VA File Number	XX-XXX-123
Social Security Number	XXX-XX-1234

### Viewing History

You are the first VSO Representative to view this request.

2. The "Request Status" in the detail page of the 21-22 provides valuable information:
  - A "New" status indicates that the SEP user is the first to view the new 21-22, including the 21-22 details page.
  - A "Pending" status indicates that other SEP users have reviewed the 21-22, but that they have not taken action.
  - The "Accepted" and "Declined" statuses inform the SEP user that an action has been taken, and of that action's date and time.



## 5.4 Accept or Decline 21-22

Only SEP users who are authorized to accept or decline 21-22s on behalf of their organization are able to see the “Accept Request” and “Decline Request” buttons at the top of the 21-22 detail screen.

- Important: In order to accept or decline a 21-22, the SEP User must be authorized to do so within the OGC Database. If a SEP user is unable to accept or decline a 21-22, the SEP user must coordinate with their organization and the OGC Accreditation to become authorized to accept or decline a 21-22. OGC Accreditation can be contacted at [AccreditationMailbox@va.gov](mailto:AccreditationMailbox@va.gov).

1. To accept or decline a 21-22, select one of the options at the top of the detail screen.



2. To confirm that you accept a 21-22, select the “Accept Request” button at the bottom of the popup screen.



3. When you click the “Accept Request” button, the system revalidates your user identity and treats your acceptance as a virtual signature.
  4. After confirming your acceptance of the 21-22, the detail page will reload and display the 21-22’s new status, as well as the Veteran’s File Number and Social Security Number.
- The Veteran or claimant will receive a message through a secure messaging center located in their eBenefits account that his/her 21-22 POA request was accepted.

- You may return to the 21-22 search results screen and evaluate other 21-22 requests.

SEP Dashboard Representation Requests VSO Work Queue

Representation Requests Detail for: 10/29/2014 Accepted Request from WILLIAMS, AGNES Post: Escoria, User

**Detail for: 10/29/2014 Accepted Request**  
WILLIAMS, AGNES requesting Disabled American Veterans

**Claim Information**

Date Request Received	10/29/2014
Request Status	Accepted
Sharing of PHI	Authorized
Limitations of Consent	No Limitations
Change of Address	Authorized

**Veteran Information**

Veteran Name	WILLIAMS, AGNES S
VA File Number	796-29-6390
Social Security Number	796-29-6390

**Claimant Information**

Claimant Name	WILLIAMS, AGNES
Relationship to Veteran	SELF
Address (City, State, ZIP)	123 ENG 2ND PLT-BCO AE, 003
Daytime Phone	
Evening Phone	

5. To decline a 21-22, select the “Decline Request” button at the top of the detail screen.

Action:  -OR-  [Go back to search results](#)

- You must provide a reason for declining a 21-22. After providing a reason, click onto the “Confirm” button to finalize your decline action.

**Please confirm your declination of this representation request.**

**Veteran:** Capone, Anthony Jay  
**Requesting:** AMVETS

**Reason:**

Required field.

6. After you confirm your decline action for the 21-22, the 21-22 detail page will reload and display its new status.

- The Veteran or claimant will receive a message through a secure messaging center located in his/her eBenefits account that the 21-22 request was declined.
- You may return to the 21-22 search results screen and evaluate other 21-22 requests.

## 6.0 SEP Dashboard

After the SEP user successfully logs in, the system will direct the SEP user to the VSO Representative Dashboard, where the user may search for Veterans.

- Note the difference in the screen below. Because a VSO has more authorized roles, an Attorney or a Claim Agent has less functions within SEP than that of a VSO Representative.

## 6.1 Search for a Veteran

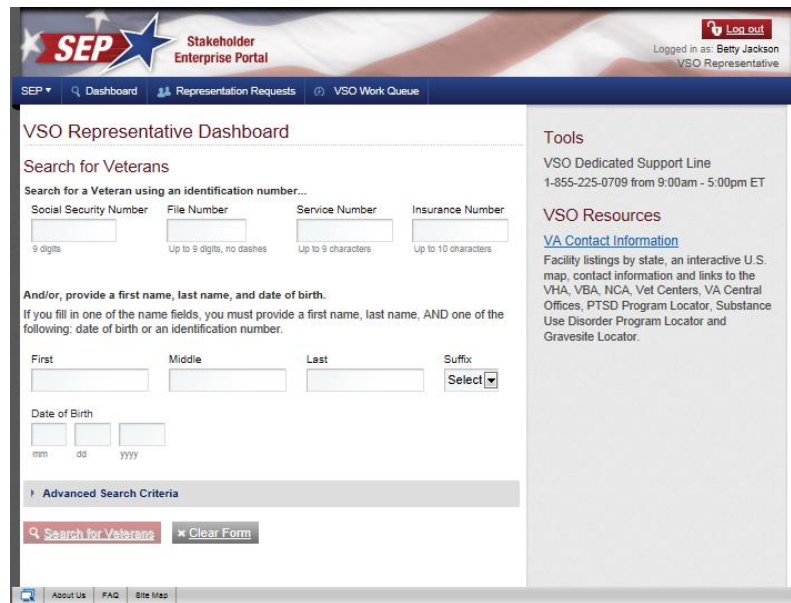
You may use the SEP Representative Dashboard's search criteria to locate Veterans for whom you have a POA. (The POA gives permission to an authorized SEP User to represent and/or manage a Veteran's VA-related business.)

1. From the SEP Dashboard screen, enter the following:

- Veteran's Social Security Number, File Number, Service Number, or Insurance Number.  
(Only one criterion is necessary.)

*or*

- Veteran's First Name, Last Name, and Date of Birth (DOB) (All criterion required)



The screenshot shows the 'VSO Representative Dashboard' with a search section titled 'Search for Veterans'. It includes fields for Social Security Number (9 digits), File Number (Up to 9 digits, no dashes), Service Number (Up to 9 characters), and Insurance Number (Up to 10 characters). Below these are fields for First, Middle, Last, and Suffix (with a dropdown menu), and a Date of Birth field (mm, dd, yyyy). A 'Search for Veterans' button and a 'Clear Form' button are at the bottom. The dashboard also features a 'Tools' section with 'VSO Dedicated Support Line' information and 'VSO Resources' including a link to 'VA Contact Information'.

2. You may use “**Advanced Search Criteria**” to enhance your search for finding a Veteran.

3. If you select **“Clear Form,”** all of the entered Veteran information will clear from their fields, and you will remain on the Dashboard screen.
4. After entering the Veteran’s information, click onto the **“Search for Veterans”** button.
5. The Veteran Search Results will then appear with partial identifiable information.

### Representative Dashboard

#### Veteran Search Results

Searches return Veteran records that match your search criteria, designate you as their representative for VA Claims, and meet the approved permission level.

You searched using SSN ending in 0000

[Change Search Criteria](#)

Showing 1 Search Result

Name	Birthdate	SSN	Location	Represented Through	eBenefits Account?	Email Address	Veteran Actions
VETERAN, NAME	02/13/1958	XXX-XX-0000	SWANSBORO, NC	Disabled American Veterans	Yes	example@gmail.com	<a href="#">Actions</a>

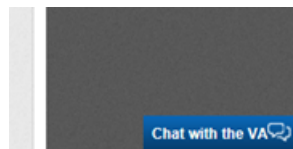
6. Click onto **“Actions”** to view the Veteran’s profile.
7. To search for a different Veteran, click onto **“Change Search Criteria”** to return to the Representative Dashboard.
  - a) Note that you must click onto **“Clear Form”** before inputting the next Veteran’s search criteria in order to remove information of prior search.

## 6.2 Authenticated Chat

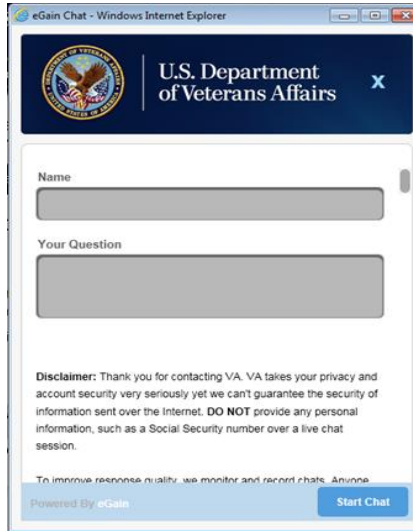
You may communicate directly with a National Call Center agent through an authenticated chat box window located within the SEP Portal. You may ask VA-related questions, including those that are sensitive, regarding a Veteran. Note that questions must pertain to the Veteran whose information appears in the Dashboard screen at the time of the chat session.

To initiate an authenticated chat regarding another Veteran, you must exit the existing chat session, start a new search for a new Veteran, and once the Veteran's information appears in the Dashboard screen, re-initiate a new chat session. To initiate an authenticated chat, see the directions below.

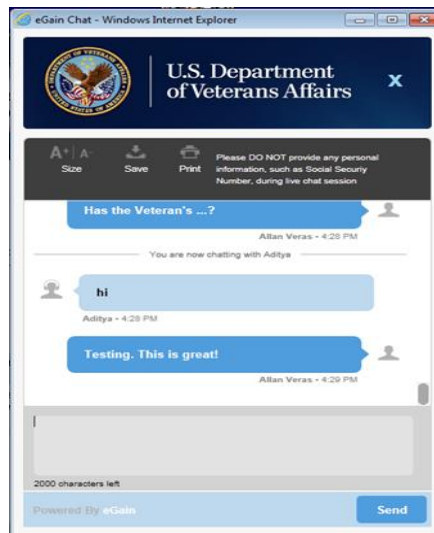
- **IMPORTANT: Do not enter Personally Identifiable Information (PII) regarding the Veteran into the chat box window. The National Call Center Agent will have the Veteran's information available when you initiate a chat session.**
1. Once the Veteran's Record appears in your Representative Dashboard, click onto the "Chat with the VA" blue icon located on the bottom right of your screen.



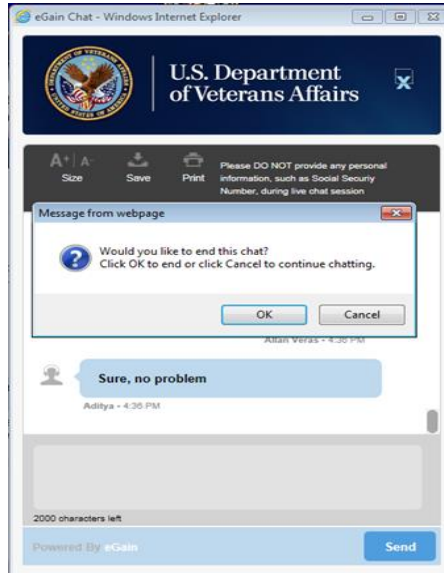
2. A popup window will appear where you may initiate a chat session with a National Call Center Agent. Type your name and your question into the window, and click the "Start Chat" button.
- **IMPORTANT: Do not enter Personally Identifiable Information about the Veteran into the chat box window. The National Call Center Agent will already have the Veteran's information available when you initiate a chat session.**



3. You will be connected to a chat room where a live agent will be available to take your questions.



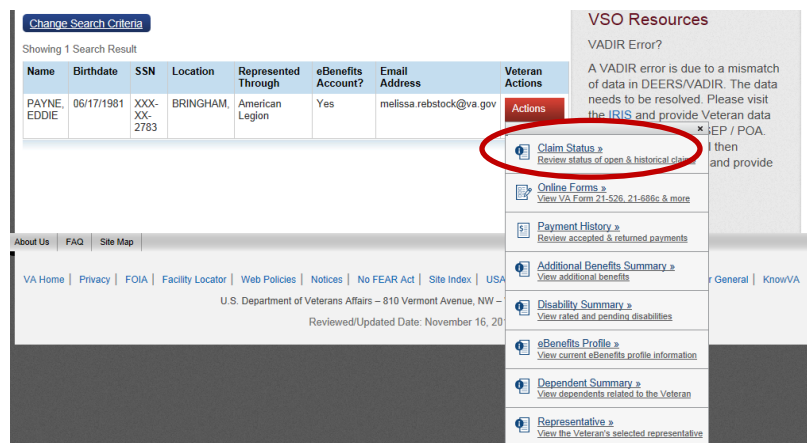
4. To end the chat session, click onto the “X” located in the blue panel at the top of the screen. A popup screen will appear. Click onto OK when prompted.



## 6.3 Claim Status and Document Upload

A SEP user (e.g., VSO, Attorney, or Claims Agent) can view and act on a Veteran’s Compensation/Dependent claim if the Veteran grants the SEP user Power of Attorney (POA) through VA form 21-22.

1. To view a Veteran’s Claim Status, select the “Claim Status” option from the “Actions” drop-down menu located in the “Veteran Search Results” screen.



2. The system will display a Work in Process page with Intent-to-File (ITF), Open Applications, and Claim Status of Submitted Claims.



SEP Dashboard Representation Requests VSO Work Queue

Currently Representing: PAYNE, EDDIE SSN: XXX-XX-2783 Location: BRINGHAM Represented Through: American Legion

## Work in Process for: Payne, Eddie

Your notifications of Intent to File, Open Applications, and Open Claims are shown below and can be managed here on eBenefits before they expire.

### Intent to File <sup>9</sup> [Learn more about Intent to File](#)

Received	Type	Expiration	Source	Status
05/19/2015	Compensation	05/19/2016	Online	Duplicate
05/03/2015	Compensation	05/03/2016	Online	Active
04/01/2015	Compensation	04/01/2016	Online	Claim_received

### Open Applications [View Completed Applications](#)

Please delete any open applications below that you do not want to submit to VA. Reminder: Unsubmitted applications will be deleted when they expire.

Started	Type	Updated	Expiration	Intent to File Received	Status	Actions
05/19/2015	Compensation Benefits	06/08/2015	06/02/2016	N/A	Open	<a href="#">Continue</a> <a href="#">Delete</a>

### Claim Status

If a new claim is submitted while an existing claim is pending, any new information will be consolidated with the pending claim. The new claim will then be marked as Complete and moved to Historical Claims with no further action required.

Submitted	Type	Status	Updates	Actions
01/02/2015		Pending Decision Annual	<a href="#">Development Letter</a>	<a href="#">Upload Documents</a>

- An ITF signifies that the SEP user (on behalf of the Veteran) or the Veteran has submitted partial information in support of a claim, and that the user or Veteran needs additional time to gather the outstanding information or documentation required to complete a fully developed claim. The ITF section in the “Claims in Process” screen informs the user of the ITF’s Received Date, Type, Expiration Date, Source, and Status. [Click here to learn more about the ITF.](#)

### Intent to File <sup>9</sup> [Learn more about Intent to File](#)

Received	Type	Expiration	Source	Status
04/01/2015	Compensation	04/01/2016	Online	Active

3. To view “Historical claims” for the Veteran, select “Historical Claims” on the left-hand side panel.


SEP Dashboard Representation Requests VSO Work Queue

Currently Representing: PAYNE, EDDIE SSN: XXX-XX-2783 Location: BRINGHAM Represented Through: American Legion

## Historical Claims for: Payne, Eddie




This page shows claims that were closed on or after January 1, 2008. For information about a claim that is not shown here, contact VA at 1-800-827-1000. You can also use our [Inquiry Routing & Information System \(IRIS\)](#) to ask a question about your claim. You will receive a response within five days.

Submitted	Type	Closed	Updates
05/06/2015	Dependency	06/09/2015	
05/05/2015	Dependency	06/09/2015	
04/22/2015		06/09/2015	
03/12/2015	Dependency	06/09/2015	
01/26/2015		06/09/2015	
01/08/2015	Compensation	01/02/2015	
01/08/2015	Compensation	01/02/2015	Development Letter Sent
01/08/2015	Compensation	01/02/2015	
01/05/2015	Dependency	06/09/2015	
12/30/2014		01/02/2015	

4. The items that display a  are urgent or past due. To view the claim's status, click onto the date of the claim.

### Claim Status

If a new claim is submitted while an existing claim is pending, any new information will be consolidated with the pending claim. The new claim will then be marked as Complete and moved to Historical Claims with no further action required.

Submitted	Type	Status	Updates	Actions
03/07/2015		Under Review		<a href="#">Upload Documents</a> <a href="#">DBQs Recommended</a>
06/26/2014	Compensation	Gathering Of Evidence	 Documents Needed from You  Requested Documents are Past Due  Development Letter Sent	<a href="#">Upload Documents</a> <a href="#">View Documents</a>

5. In the "Claim Details" screen, click onto "Needed from You" or onto "Needed from Others" to view the list of documents that the user will need to upload to support the Veteran's claim.

#### Status of Your Claim

Submitted: 06/26/2014 (Compensation)

Estimated Completion: At this time, your Regional Office is unable to provide an estimated completion date for this type of claim.

Disabilities Claimed: Tinea pedis (New), hearing loss (New), Sleep apnea syndromes (Increase)

Representative for VA Claims: DISABLED AMERICAN VETERANS

Current Status: Gathering of Evidence

[Mail or Fax Instructions](#)

GATHERING OF EVIDENCE

#### Ask VA to Decide Your Claim

You can request to have your claim evaluated as soon as possible, if you have no other documents or evidence to provide VA. VA will evaluate your claim without waiting for additional evidence.

[Request a Claim Decision](#)

Note: Documents uploaded here may not be available to VA for 24 hours.

Needed from You (0)
Needed from Others
All Uploaded Documents

#### Optional Documents

Please submit any supporting documents. Include any documents that we requested when you submitted your application for this claim.

[Upload Documents](#)

6. A list of requested documents, along with the documents' statuses, will appear.

Needed from You (0) | Needed from Others | All Uploaded Documents

**Optional Documents**  
Please submit any supporting documents. Include any documents that we requested when you submitted your application for this claim. [Upload Documents](#)

**Request 1**  
Due Date: 01/15/2015 Status: Submitted, Awaiting Review [Upload Documents](#)  
In support of your claim for a temporary 100% evaluation, we need medical evidence showing you had surgery and/or received medical treatment for a service connected disability which required a convalescence period of at least one month, or hospitalization of at least 21 days.  
Outpatient treatment records from Personal Physician: PMEDs St Vincent.pdf Submitted On: 12/17/2014

**Request 2**  
Due Date: 01/15/2015 Status: Submitted, Awaiting Review [Upload Documents](#)  
As we consider your claim, you may submit evidence showing that your service-connected [[has]]increased in severity.

7. Click onto “Upload Document” to upload the requested documentation.
8. Click onto “Browse for Files” to locate and select the file to upload. When browsing for files to upload, user may select multiple files. There is no need to upload one file at a time.

Currently Representing: PAYNE, EDDIE SSN: XXX-XX-2783 Location: BRINGHAM Represented Through: American Legion

## Upload Documents for Request 1

**Instructions for Uploading Documents**

**Step 1: Select the files to upload for this request.**  
Note - There are restrictions on the size and type of file that can be uploaded:

- The maximum file size is **10 MB**.
- Acceptable file formats: **PDF (unlocked), GIF, TIFF, TIF, JPEG, JPG, BMP, and TXT**.

**Step 2: Select a Document Type for each document you are uploading.**  
Note - You can submit these documents for additional document requests in the table below. If needed, you can add additional documents to each request.

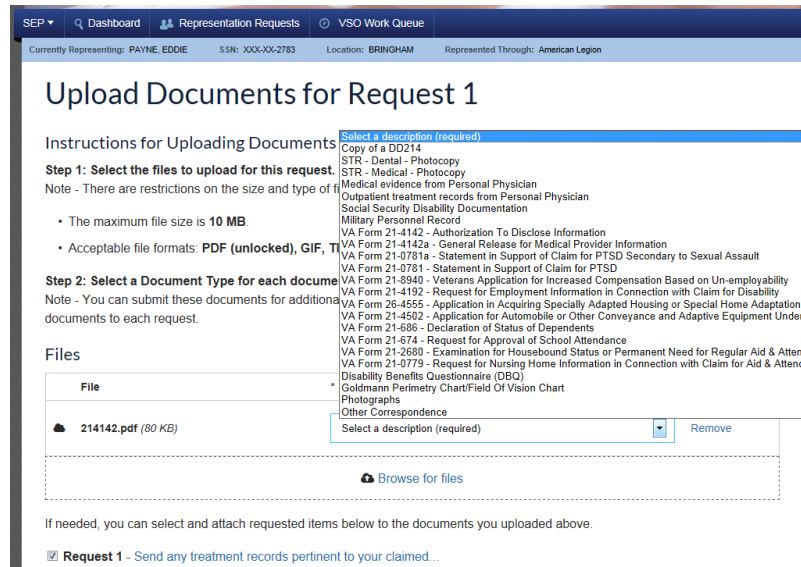
**Files**

File	Type	Actions
<a href="#">Browse for files</a>		

If needed, you can select and attach requested items below to the documents you uploaded above.

**Request 1** - [Send any treatment records pertinent to your claimed...](#)

9. After selecting the files to upload, click onto the “Select a Description” drop down list to select the documentation type for each file upload.



10. Select “Upload Documents.” The screen will display a progress bar showing the progress of the upload.

File	Type	Actions
214142.pdf		100%
<a href="#">Browse for files</a>		

11. A success screen should appear.

Files

File	Type	Actions
<input checked="" type="checkbox"/> Submitted to VA: 214142.pdf Mon Jul 20 11:22:18 EDT 2015	VA Form 21-4142 - Authorization To Disclose Information	
<a href="#">Browse for files</a>		

12. After uploading a file, the user may browse for additional files to upload by clicking onto “Browse for Files” and selecting the additional file(s).

13. For an additional verification that the document upload was successful, click onto “All Done” to return to the Claim Status page. On the “Claim Status” page, click onto the tab “All Uploaded Documents.” A tabbed screen will appear listing the documents uploaded into the Veteran’s profile.

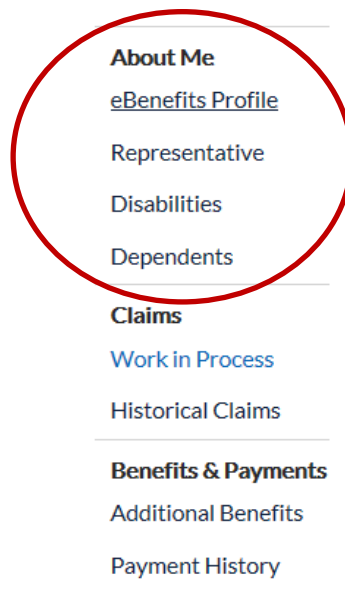
Note: Documents uploaded here may not be available to VA for 24 hours.

Needed from You (0)	Needed from Others	All Uploaded Documents	
All documents submitted after January 25, 2015 are shown below.			
Document Name	Document Type	Submitted	By
PMEDs Baptist Rehab.pdf	Outpatient treatment records from Personal Physician	12/17/2014	
PMEDs St Vincent.pdf	Outpatient treatment records from Personal Physician	12/17/2014	

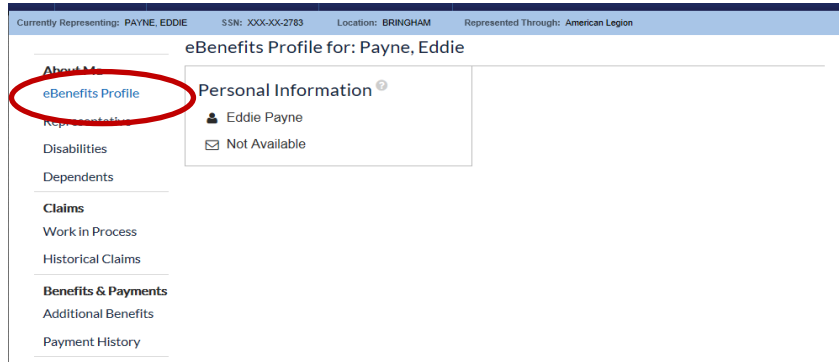
Don't see a document listed? [Check our Unsolicited Items page](#) to see if it was received by VA.

## 6.4 About Me

The left-hand side navigation panel within the Claims screen enables the SEP user to navigate easily to functional areas, including to the “About Me” page. On the “About Me” page, the SEP user can view information on Veteran’s benefits, Representative, and disabilities. The information within these links mirrors that information the Veteran accesses in the eBenefits portal.



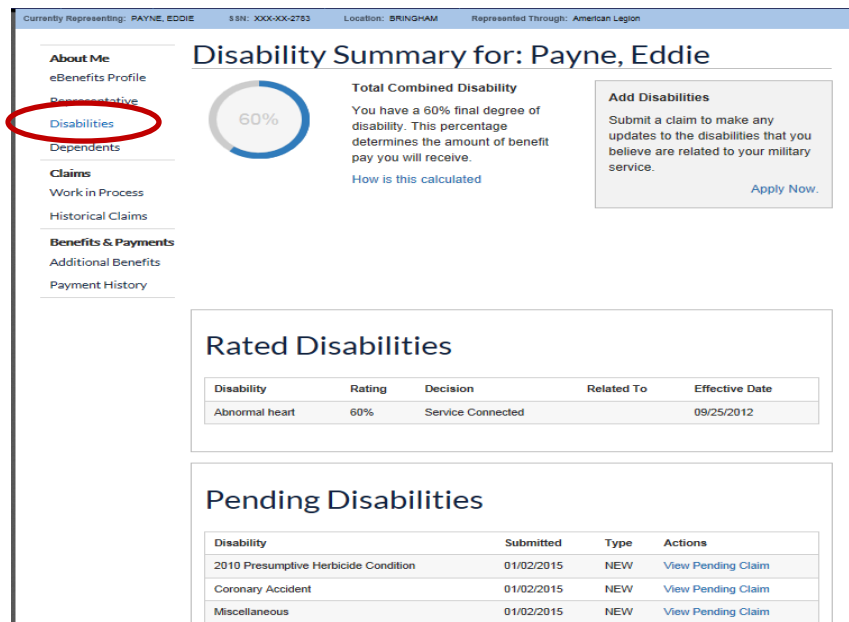
1. Click onto the “eBenefits Profile” to view the Veteran’s eBenefits username and the e-mail address associated with the Veteran’s eBenefits account.



2. Click onto “Representative” to view the Veteran’s Representative information.



3. Click onto “Disabilities” to view a summary of the Veteran’s disabilities. A SEP user is able to view the Veteran’s Total Combined Disability, Rated Disabilities, and Pending Disabilities claimed. Notice that the page also links to a web page that allows the user to add Disabilities.



- Note that if a Veteran does not have pending disabilities, the Pending Disabilities section will populate with the below message.

## Pending Disabilities

We cannot retrieve your information at this time. Please try again later. We apologize for the inconvenience.

- Click onto “Dependents” to view a summary of the Veteran’s Dependents. A SEP user is able to view the Veteran’s Dependent Status and Dependents on an Award. Notice that the page also links to a web page that allows the user to add or remove dependents.

Currently Representing: PAYNE, EDDIE    SSN: XXX-XX-2753    Location: BRINGHAM    Represented Through: American Legion

### Dependent Summary for: PAYNE, EDDIE

**Dependent Status**  
The information on this page represents dependency information available in our records.

**Add or Remove Dependents**  
Apply to have a new spouse or child added to, or removed from, your compensation award.  
[Apply Now.](#)

**Dependents on an Award**  
The following dependents are listed on your current award:

Name	Date of Birth	Age	SSN	Relationship	Award
JACKI PAYNE	01/12/1986	29	XXX-XX-4415	Spouse	Compensation
ROSS PAYNE	10/17/1993	21	XXX-XX-2217	Child	Compensation
WILLY PAYNE	03/09/2004	11	XXX-XX-8778	Child	Compensation

[Show Dependents not on an Award](#)

- What award types are shown on this page?
- I submitted a paper application for a Dependent. Why doesn't it show here?
- Who do I contact if I see an error or have questions regarding my claim?
- What if my dependent is a parent?
- At what disability level do I receive additional compensation for my dependents?

- Note that if a Veteran or SEP User has submitted a claim for dependency benefits that has not yet been awarded, the SEP user will see the below message:

**⚠ You submitted one or more claims for dependency benefits pending review.**  
We will update your dependent information as soon as we complete processing your claim.

- If the Veteran does not have dependants on the award, the SEP user will see the below message:

**Dependents on an Award**  
You have no dependents listed on an award at this time.  
[Show Dependents not on an Award](#)

- To show Dependents in which the Veteran is not currently receiving benefits for on an award, click onto “Show Dependents not on an Award.”

[Hide Dependents not on an Award](#)

You are not currently receiving additional benefits for the dependents shown below:

◆ Name	◆ Date of Birth	◆ Age	◆ SSN	◆ Relationship
JANE PAYNE	09/01/1976	39	XXX-XX-3111	Spouse
RICHARD PAYNE	06/17/1987	27	XXX-XX-9889	Child
VAUGHN PAYNE	02/14/1994	21	XXX-XX-5696	Child

## 6.5 Benefits & Payment History

A SEP user is granted the right to perform certain functions on behalf of the Veteran for whom they have POA. For example, the SEP user may access additional benefits and the payment history for the Veteran or for that of his/her dependents.

1. To view additional benefits for Veterans, select “Additional Benefits Summary” from the “Actions” drop-down list. The “Actions” drop-down list is found in the “Veteran Search Results” panel.

The screenshot shows a search result for a veteran named PAYNE, EDDIE. The table lists details such as Birthdate (06/17/1981), SSN (XXX-XX-2783), Location (BRINGHAM), Represented Through (American Legion), eBenefits Account? (Yes), and Email Address (melissa.restock@va.gov). The 'Veteran Actions' dropdown menu is open, showing options like Claim Status, Online Forms, Payment History, Additional Benefits Summary (highlighted with a red circle), Disability Summary, eBenefits Profile, Dependent Summary, and Representative. A 'VSO Resources' panel on the right displays a 'VADIR Error?' message.

2. Additional Benefits include Eligibility Determinations and Supplementary Benefits. Details for each can be expanded and closed by clicking the symbol. If there are no awarded additional benefits, the “Benefits” table will be blank.



## Additional Benefits for: Ruiz, Jeanette

Some of the benefits you are currently receiving, or are entitled to, appear below. Do not consider this list as proof of benefits because recent updates may not be included. You may be approved for additional benefits that do not yet appear below.

For questions about your benefits, please contact the Department of Veterans Affairs:

- **By Phone:**\* 1-800-827-1000 (711 if you use a TDD)
- **Online:** Use our [Inquiry Routing & Information System \(IRIS\)](#)

\*Monday - Friday, 8:00 am - 9:00 pm ET

Benefits
<a href="#">+ Eligibility Determinations</a>
<a href="#">+ Supplementary Benefits</a>

3. If the Veteran is eligible for benefits, the table will display Eligibility Determinations.

Benefits
<a href="#">- Eligibility Determinations</a>
<p>Below is a summary of your eligibility determinations. If you do not see an eligibility determination you applied for listed below, it may still be under review and a decision has not yet been made.</p>
<a href="#">- Mental Health Treatment</a>
<p>Eligible for mental health treatment for any service-related mental disorder. <a href="#">Learn More</a></p>
<a href="#">- Memorandum Rating for VR&amp;E</a>
<p>Eligible for the Memorandum Rating for Vocational Rehabilitation and Employment purposes. <a href="#">Learn More</a> To apply for vocational rehabilitation, complete <a href="#">VA Form 28-1900</a> that will allow you to apply for the full spectrum of benefits offered by VR&amp;E.</p>

- If a Veteran has applied for an Eligibility Determination, but he/she has ***is not eligible*** for that benefit, SEP will display the below message.

Benefits
<a href="#">- Eligibility Determinations</a>
<p>We have reviewed your application for eligibility determinations. Based upon our review, we have determined that you may not be eligible for certain benefits.</p>

- If the Veteran has applied for Eligibility Determinations, but a ***decision has not been made***, the SEP display the following message.

Benefits
<a href="#">- Eligibility Determinations</a>
<p>Below is a summary of your eligibility determinations. If you do not see an eligibility determination you applied for listed below, it may still be under review and a decision has not yet been made. Please also check <a href="#">Other Decisions</a> before calling.</p>

- If the Veteran is entitled to Supplementary Benefits, the table will display those Supplementary Benefits.

**Benefits**

[Supplementary Benefits](#)

Below is a summary of the supplementary benefits you were approved for. If you do not see a benefit you applied for listed below, it may still be under review and a decision has not yet been made. Please also check [Other Decisions](#) before calling.

[Extension of Vocational Rehabilitation Benefits](#)

Entitled to Extension of Ch31 Delimiting Date - Extension of Vocational Rehabilitation and Employment Benefits - Entitled to an extension of basic 12-year period of eligibility, which is your delimiting date for receiving vocational rehabilitation and employment benefits. This is based upon your last qualifying period of active duty or the date you were notified by VA of a service connected disability rating. [Learn More](#)

[Special Home Adaptation](#)

Entitled to Special Home Adaptation. [Learn More](#)

- If a Veteran has applied for a Supplementary Benefit, but he/she has ***not been awarded*** that benefit, SEP will display the below message.

**Benefits**

[Supplementary Benefits](#)

We have reviewed your application for supplementary benefits. Based upon our review, we have determined that you may not be eligible for certain benefits.

- If the Veteran has applied for Supplementary Benefits, but a ***decision has not been made***, the SEP will display the following message.

If you do not see a supplementary benefit you applied for listed below, it may still be under review and a decision has not yet been made. Please also check [Other Decisions](#) before calling.

- In order to see benefit decisions, the SEP User may click onto the “Other Decisions” link, which will direct the SEP user to the list of denied benefits.

## Other Decisions for: Curtis, Travis

Unfortunately, we were not able to grant you the benefits listed below.

For questions about your benefits, please contact the Department of Veterans Affairs:

- **By Phone:**\* 1-800-827-1000 (711 if you use a TDD)
- **Online:** Use our [Inquiry Routing & Information System \(IRIS\)](#)

\*Monday - Friday, 8:00 am - 9:00 pm ET

### Supplementary Benefits

#### Auto or Adaptive Equipment

Not entitled to Automobile Grant of up to \$20,114.34 or Adaptive Equipment for your Automobile. [Learn More](#)

#### Education Assistance Program

Not entitled to Basic Eligibility under the Survivors' and Dependents' Education Assistance Program. [Learn More](#)

5. To view payment history for Veterans, select "Payment History" from the "Actions" drop-down list. The "Actions" drop-down list is found in the "Veteran Search Results" panel.

The screenshot shows a search result for a veteran named PAYNE, EDDIE. The search results table includes columns for Name, Birthdate, SSN, Location, Represented Through, eBenefits Account?, and Email Address. The 'Actions' column contains a red dropdown menu. The dropdown menu is open, showing several options: Claim Status, Online Forms, Payment History (highlighted with a red circle), Additional Benefits Summary, Disability Summary, eBenefits Profile, Dependent Summary, and Representative. A 'VSO Resources' panel is also visible on the right side of the screen.

Name	Birthdate	SSN	Location	Represented Through	eBenefits Account?	Email Address	Veteran Actions
PAYNE, EDDIE	05/17/1981	XXX-XX-2783	BRINGHAM	American Legion	Yes	melissa.restock@va.gov	Actions

- The payment history page should appear. The system will display a default payment date range, from January of the current year to the present month. You may refine your search by using specific date range drop-downs located below the date fields. The payment history page will also display any returned payments applicable.

SEP ▾ Dashboard Representation Requests VSO Work Queue

Currently Representing: PAYNE, EDDIE SSN: XXX-XX-2783 Location: BRINGHAM Represented Through: American Legion

## Payment History for: PAYNE, EDDIE

[Print This Page](#)

### Payments

From: Nov 2012 To: Jun 2015 [Filter](#)

Date	Amount	Type	Method
06/01/2015	\$1,340.00	Compensation & Pension - Recurring	Direct Deposit
05/01/2015	\$1,340.00	Compensation & Pension - Recurring	Direct Deposit
04/01/2015	\$1,340.00	Compensation & Pension - Recurring	Direct Deposit

[Show All Items](#) You have 33 additional items not currently displayed

#### About Payments

**Disclaimer:** Detailed information about some benefits payments may not be available online. For example, payments made in amounts less than \$1 for direct deposit or \$5 for mailed checks will not be displayed in the claimant's online payment history. Gross payments and modifications will display only for recurring and irregular compensation payments. If you (representative) or the claimant have questions about payments made by VA, please call the VA Help Desk at 1-800-827-1000.

**Payment Dates:** VA pays benefits on the first day of each month for the previous month. But if the first day of the month falls on a weekend or holiday, payment is made on the last business day of the previous month. Example: If May 1 is a Saturday, then benefits would be paid on Friday, April 30.

- The initial payment screen displays a summary of payments made to the Veteran, including returned payments. Select the specific payment date to view payment details. Payment details may include reductions from the gross payment, as well as bank or check payment information. At the bottom of the pages, under "About," the SEP user may find explanatory information, including payment mail dates and returned payments. Note that because the SEP user views the same data and information that the Veteran views through the eBenefits portal, the SEP user may also be able to provide contextual assistance to the Veteran.

Currently Representing: MARSHALL, VERA SSN: XXX-XX-7498 Location: WASHINGTON, DC Represented Through: American Legion

[Dashboard](#) [Payment History for MARSHALL, VERA](#) [Detail for Compensation & Pension - Recurring Payment](#) [Print-Friendly View](#)

## Payment Details for MARSHALL, VERA

### Details on your Compensation & Pension - Recurring Payment

Gross Payment Amount	\$2,080.00
Total Modifications	-\$500.00 <a href="#">show details</a>
Net Payment Amount	\$1,580.00
Payment Date	04/01/2014
Payment Type	Compensation & Pension - Recurring
Payment Method	Mailed Check
Check Recipient	VERA MARSHALL
Address Line 1	121 JUMP STREET
Address Line 2	FAIRFAX VA
Zip Code	22030

#### Tools

VSO Dedicated Support Line  
1-855-225-0709 from 9:00am - 5:00pm ET

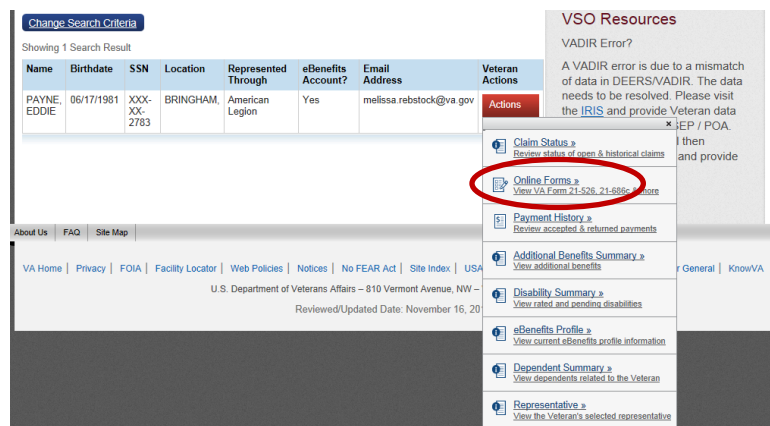
#### VSO Resources

[VA Contact Information](#)  
Facility listings by state, an interactive U.S. map, contact information and links to the VHA, VBA, NCA, Vet Centers, VA Central Offices, PTSD Program Locator, Substance Use Disorder Program Locator and Gravesite Locator.

## 6.6 Online Forms

The SEP users are allowed to access online forms for those Veterans who grant them Power of Attorney (POA). This process is using the same Electronic Claims Submission Process dashboard that Veterans use in eBenefits.

1. To access a Veteran's online forms, the authorized SEP user selects the "Online Forms" option from the "Actions" drop-down menu. The "Actions" drop-down menu is found in the Veteran Search Results.



The system will display the Online Application Dashboard of the selected Veteran. The dashboard will display the current summary of open, submitted, and completed applications and forms. Open applications are displayed in descending order from the newest to the oldest.

- **Note:** Forms available through SEP are identical to those available to the Veteran through eBenefits. In addition, the SEP and eBenefit web portals enable the SEP user and Veteran to interact in order to complete and submit online forms to the VA. The interactive capability between SEP and eBenefits is especially helpful when a SEP user requires a Veteran's Signature on a form (e.g., VA Form 21-526EZ). In this scenario, the Veteran can upload a signed form in PDF format through eBenefits for the SEP user's retrieval and action in SEP.

SEP ▾ Dashboard Representation Requests VSO Work Queue

Currently Representing: PAYNE, EDDIE SSN: XXX-XX-2753 Location: BRINGHAM Represented Through: American Legion

## Online Applications Dashboard

We are building a library of benefit-related applications to enable you to apply for and manage your benefits online. Here you can save, complete, and submit applications; apply to update your benefits; release medical information; or appoint a representative for VA claims.

### Start a New Application

**Dependent Benefits**

Select this application to manage the list of dependents you claim as part of your benefits profile.

[Apply Now](#)

**Compensation Benefits**

Select this application to apply for, or manage, your compensation benefits.

[Apply Now](#)

**Request for Representative**

Claimants appoint representatives to serve as Power of Attorney (POA) and act on their behalf in the preparation, presentation, and prosecution of claims for VA benefits (38 U.S.C. 5902, 5903, and 5904).

[Apply Now](#)

**Release Medical Records**

Select this application to authorize non-VA medical centers to release medical information to the VA.

[Apply Now](#)

### Open Applications

If you no longer need your open application, please delete it below. If a Veteran Service Organization (VSO), attorney, or claims agent is completing or reviewing your application, you should contact your representative before submitting it. Reminder: Unsubmitted applications will be deleted when they expire.

Application Type	Status	Created	Last Updated	Intent to File Received	Expires	Actions
No open requests are available.						

### Completed Applications

Submitted applications that are more than 365 days old do not appear in this table. You can view them in [Claim Status](#). If your completed application includes any incorrect information, you must either complete a new application or [contact the VA](#).

Application Type	Created	Completed Online	Actions
<a href="#">Compensation Benefits</a>	Sep 8, 2014	Sep 8, 2014	<a href="#">View</a>
<a href="#">Compensation Benefits</a>	Sep 8, 2014	Sep 15, 2014	<a href="#">View</a>
<a href="#">Compensation Benefits</a>	Sep 15, 2014	Sep 15, 2014	<a href="#">View</a>
<a href="#">Compensation Benefits</a>	Sep 6, 2014	Sep 6, 2014	<a href="#">View</a>
<a href="#">Compensation Benefits</a>	Sep 30, 2014	Sep 30, 2014	<a href="#">View</a>

## 7.0 Submit Form 21-526EZ on Behalf of a Veteran

Once the Veteran's POA is in the VA system, a representative of that VSO can use SEP to prepare a disability compensation application (VA Form 21-526EZ) on behalf of the Veteran. However, the Representative may **not** be able to electronically submit the application through SEP.

1. Each VSO decides whether or not an individual representative can submit the application in SEP.  
While using SEP:
  - A representative **with** the right/authority to submit the application will be given that option.
  - A representative **without** the right/authority to submit the application will be able to electronically send the application for review by a representative with the authority.
2. Below are the POA types and their typical authorization, which is subject to the VSO's or Veteran's refinement:
  - Most National VSOs (NVSOs) submit a claim on behalf of the Veteran without a VSO organization's review.
  - Most, but not all, County VSOs (CVSOs) cannot submit a claim on behalf of a Veteran, even if the claim has all the necessary certification information, without a VSO organization's review.
  - Most Attorneys and Claim Agents have the same rights as NVSOs.
3. A POA may submit a claim if the Veteran provides authorization by either of the two methods:
  - The Veteran provides an electronic mark in the presence of a POA Witness, who in turn provides his or her electronic mark.
  - The Veteran provides a wet signature on the 21-526EZ signature page and the page is uploaded by the Veteran using eBenefits or by the VSO using SEP.

## 7.1 Verify a POA When Reopening an Existing 21-526EZ Claim

A Veteran may change representatives before an application has been submitted through SEP. Before the new Veteran Representative continues the application, the Veteran’s signature or mark will need to be updated. The system generates a message explaining this situation.

Disability Compensation Benefits OMB No. 2900-0067

**The representative has changed since the Veteran provided a signature or mark.**

If you are the new representative, you must update the Veteran's signature or mark to confirm that you have permission to submit the Veteran's claim.

[Continue](#) [Exit](#)

## 7.2 Submit an Original Claim

To ensure the Representative can prepare and/or submit an original application for a Veteran, the Representative must have permission to do so. Verification of that permission can be satisfied by either uploading a signed signature page or capturing the claimant’s and witness’ marks.

- The SEP user who can download, print, sign, and scan a document may consider uploading a **signed signature page**.

Disability Compensation Benefits [Print Incomplete Forms](#)

[Applicant Information](#) [Military Service History](#) [Disability Records](#) [Treatment Records](#) [Special Circumstances](#) [Supporting Documents](#) [Final Review & Submission](#)

**In this Section**

- [Personal Information](#)
- [Important Dates](#)
- [Getting Started](#)
- [Fully Developed Claim](#)
- [More Info on FDC Evidence & Criteria](#)
- [Claimant Signature or Mark](#)**

### Claimant Signature or Mark

OMB Control No. 2900-0747

We need to verify that you have permission to submit this application on the Veteran's behalf. To provide proof that the Veteran has granted you permission, you'll need to upload a signed claim certification and signature page or provide a claimant mark and witness signature.

**Claimant Signature**

To upload, you'll need to: (1) download the Claimant Signature form below, (2) have the Veteran sign the form; and (3) upload the signed claim certification and signature page.

[Download a VA Form 21-526EZ Claimant Signature](#)

For	Documents	Action
Eddie Payne 06/17/1981	VA Form 21-526EZ Claimant Signature You have not yet uploaded a file.	<a href="#">Add File</a>

**Claimant Mark**

If you're unable to obtain a signed certification and signature page, you'll need to: (1) read the claimant mark

- If the Veteran is unable to provide a signature, the SEP Representative may consider capturing the **claimant’s and witness’ marks**, an electronic equivalent of a mark or thumb print. When completing the “Claimant and Witness Mark” section of the claim, the SEP Representative should:



- a. Read the claimant mark statement to the Veteran;
  - b. Obtain the Veteran’s electronic mark “X”; and
  - c. Acting as a witness, check the box certifying the SEP made visual verification that the Veteran made an electronic mark.
- **Important:** A SEP Representative must be present – either via computer screen sharing or a face-to-face interview -- when the Representative verifies the claimant’s mark.

Claimant Signature or Mark

### Claimant Mark

If you're unable to obtain a signed certification and signature page, you'll need to: (1) read the claimant mark statement to the Veteran; (2) have the Veteran certify by checking the first check box below; and (3) provide your signature as a witness to the claimant's mark by checking the second check box below.

Reminder: Users of the Stakeholder Enterprise Portal (SEP) (1) must continue to comply with the rules of behavior for this computer; and (2) must be present when the Veteran is checking the claimant mark.

I certify and authorize the release of information. I certify that the statements in this document are true and complete to the best of my knowledge. I authorize any person or entity, including but not limited to, any organization, service provider, employer, or government agency, to give the Department of Veterans Affairs any information about me except protected health information. I waive any privilege that makes the information confidential.

By checking this box, you (the Veteran) certify the above in lieu of your signature. Once your application is submitted, you will not be able to make additional changes.

### Witness Mark

I certify that I am a witness to the claimant's mark, which the Veteran provided as the claim certification and signature.

By checking this box, you (the representative) certify the above in lieu of your signature.

Save & Continue

Previous

Exit

## Submission Procedures

1. At the end of the 21-526EZ claim application process, the SEP Representative who is authorized to submit on the behalf of the Veteran will have two options - to submit the application to the VA on behalf of the Veteran or allow the Veteran to review the application.

Disability Compensation Benefits

Print Incomplete Forms

Applicant Information

Military Service History

Disability Records

Treatment Records

Special Circumstances

Supporting Documents

Final Review & Submission

### Next Steps

\*\* Required to Continue

Thank you for completing a draft of the Compensation Benefits Application on behalf of the Veteran. To complete the process, you can submit the application on their behalf. You can also send the application for Veteran review.

\*\* What would you like to do next?

Submit on Behalf of Veteran

Send for Veteran Review

Save & Continue

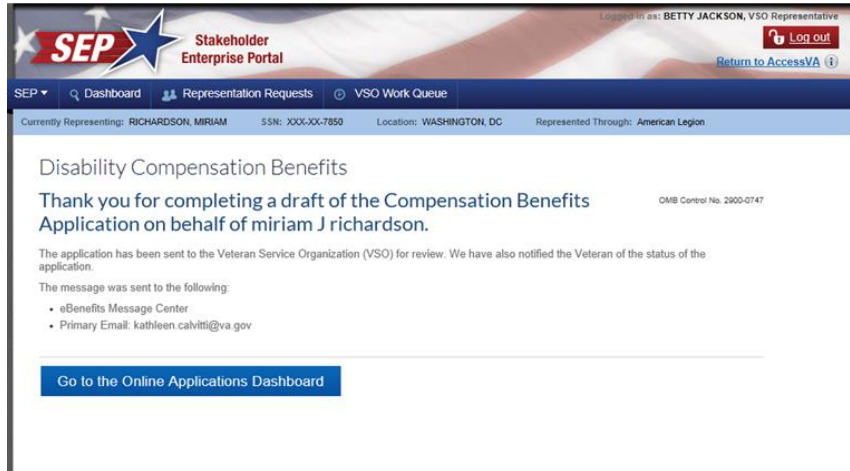
Previous

Exit

- SEP Representatives that require additional VSO review will only have the option to send the application to the NVSO for his/her review.

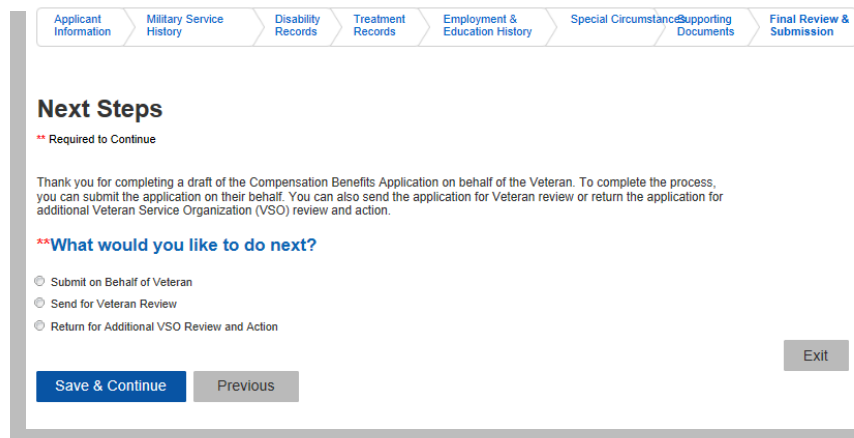
- The user will click onto “continue” to view a draft mail that will be sent to the Veteran.

- Once the user clicks onto “Send for Review”, the user will receive a message acknowledging that the application has been sent for NVSO review.




3. When the NVSO reviews, the NVSO will have the following options:

- Submit the claim on behalf of the Veteran
- Request a Veteran review
- “Return for Additional VSO Review and Action” (e.g. Return the claim to the CVSO for additional information)



4. Once a SEP Representative or an NVSO submits on the behalf of the Veteran, a submission confirmation page will appear.

## Disability Compensation Application

 Print Incomplete Forms

### Thank you for submitting the Compensation Benefits Application on behalf of {Veteran Name}.

The confirmation number is {Confirmation #}. You can view and print a copy of your completed application from the Online Applications Dashboard.

We have notified the Veteran of the status of the application. The message was sent to the following:

- eBenefits Message Center
- Primary Email: {address}
- Alternate Email: {address}

#### What's Included

The application and supporting documents were submitted to the VA for review by a claims agent. The submission includes the following documents:

- VA Form 21-526EZ
- Any Form
- Any Form

#### Next Steps

##### Supporting Documents

If you did not upload all of your supporting documents, you can still add them to the claim. To upload additional documents, follow the directions for each form listed below.

##### Veteran Aid and Attendance

(1) Print the form, (2) have an examiner complete the form, and (3) add the document to the claim using the eBenefits Compensation & Pension Claims & Upload Supporting Documents feature.

 [Download a pre-filled VA form 21-2680](#)

##### Spouse Aid and Attendance

(1) Print the form, (2) have an examiner complete the form, and (3) add the document to the claim using the eBenefits Compensation & Pension Claims & Upload Supporting Documents feature.

 [Download a pre-filled VA form 21-2680 for your spouse](#)

#### Get Additional Information

For additional information or assistance, call our toll-free number at 1-800-827-1000. A benefit counselor is available to answer your questions and provide you with any additional information you need about VA benefits and the claims process.

#### Track Your Claim

You can now track the status of your claim online. [View the status of your claim](#). Please be aware that DBQ forms may change over the course of your claim's life due to changes in law and policy. You will NOT be required to do anything or submit additional evidence. If additional medical evidence is required to rate your claim, VA will establish a DBQ exam for you free of charge.

#### Learn More about the FDC Program

Don't forget to submit your claim as a fully developed claim. For more information on the FDC Program [visit our website](#).

#### Related Actions

[Declare or manage your dependent information.](#)

[Go to the Online Applications Dashboard](#)

## Post Submission Procedures of an Original Claim

5. If the SEP Representative submitted an application on behalf of the Veteran and captured the signature by the claimant's and witness' marks, this will be captured on the PDF version of the claim application, as shown below:

further evidence in support of my claim.	
21. The FDC Program is designed to rapidly process compensation or pension claims received with the evidence necessary to decide the claim. VA will automatically consider a claim submitted on this form for rapid processing under the FDC Program. Check the box below <b>ONLY</b> if you <b>DO NOT</b> want your claim considered for rapid processing under the FDC Program because you plan on submitting further evidence in support of your claim.	
<input type="checkbox"/> I DO NOT want my claim considered for rapid processing under the FDC Program because I plan to submit further evidence in support of my claim.	
22A. VETERAN/SERVICE MEMBER SIGNATURE (REQUIRED)	22B. DATE SIGNED
X Miriam Richardson	07/17/2014
<b>SECTION VI: WITNESSES TO SIGNATURE</b>	
23A. SIGNATURE OF WITNESS (If veteran signed above using an "X")	23B. PRINTED NAME AND ADDRESS OF WITNESS
/s/ Allan Veras OGC #26070	
24A. SIGNATURE OF WITNESS (If veteran signed above using an "X")	24B. PRINTED NAME AND ADDRESS OF WITNESS
<small><b>PRIVACY ACT NOTICE:</b> The form will be used to determine allowance to compensation benefits (38 U.S.C. 5101). The responses you submit are considered confidential (38 U.S.C. 5101). VA may disclose the information that you provide, including Social Security numbers, outside VA if the disclosure is authorized under the Privacy Act, including the routine uses identified in the VA system of records, 58VA212223: Compensation, Pension, Education, and Vocational Rehabilitation and Employment Records - VA, published in the Federal Register. The requested information is considered relevant and necessary to determine maximum benefits under the law. Information submitted is subject to verification through computer matching programs with other agencies. VA may make a routine</small>	

- Note that if the claimant signature was uploaded instead, there will be a separate signature page document. The Veteran and Witness signatures will be blank on the generated 526EZ.

6. Confirmation of VSO claims submission will appear in the top left header of that claim application page, as shown below:

---

14:03 CDT 07/17/2014 #1021018 Submitted Electronically  
Submitted by POA - 5103 notice emailed/messaged to Veteran on this date: 07/17/2014



## 7.3 Submit a Supplemental Claim

When the Veteran has an eBenefits account and/or email address on record in the VA system, the SEP Representative can submit a supplemental claim without obtaining the claimant's and witness' marks or uploading a Veteran-signed signature page.

When a Veteran does not have an eBenefits account and no email address on record in the VA system, the SEP Representative will need to obtain the claimant's and witness' marks or to upload a Veteran-signed signature page in order to submit a supplemental claim, as was required with the original claim. When submitting a supplemental claim for a Veteran without an eBenefits account and without an email address, the SEP Representative should refer to [Section 7.2](#) on Submitting an Original Claim.

If the Representative tries to submit a supplemental application for a Veteran (with no eBenefits account and no email address on record) without uploading a signature page or capturing the claimant and witness marks, the system will generate the following message:

**You cannot submit an application on this Veteran's behalf.**

Before you can submit a claim on this Veteran's behalf, the Veteran must authorize you as a representative. To ensure that you can submit this application, return to the [Claim Signature page](#) to: (1) upload a signed claim certification and signature page; or (2) provide a claimant mark and witness mark.

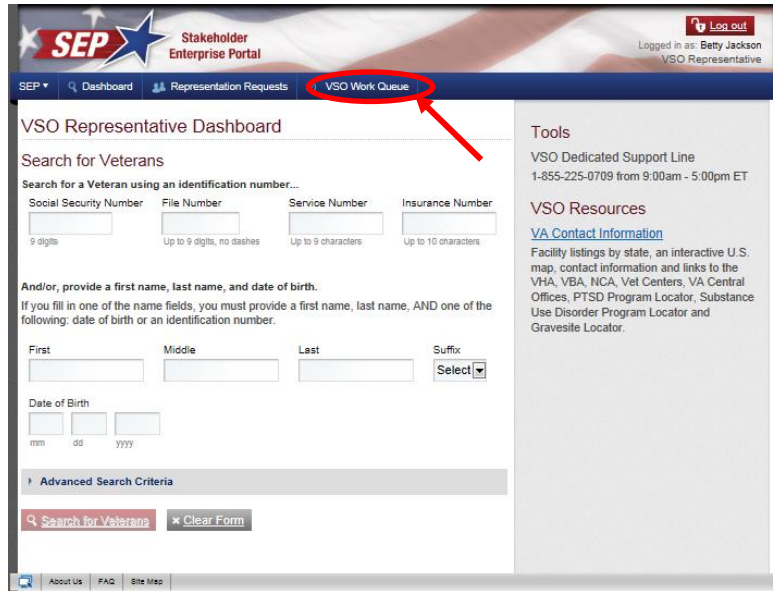
**\*\*What would you like to do next?**

Send for Veteran Review

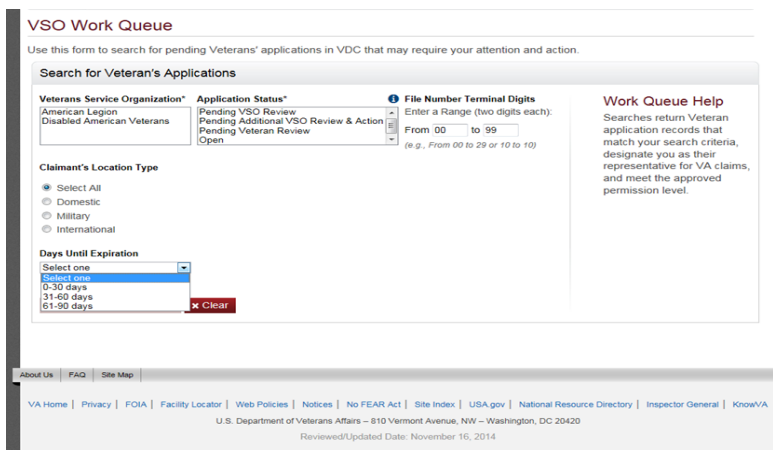
- NOTE: If the Representative selects "Send for Veteran Review," the system will allow the Representative to enter a temporary email address and will send a notification to the Veteran that a draft Compensation Benefits Application has been completed.

# 8.0 SEP Work Queue

After SEP users log into SEP, they can search for Veterans applications that have been started, but not submitted, and are in various stages of the process, by clicking onto “VSO Work Queue” located in the upper menu bar.



1. The Search for Veteran’s Applications page will appear, where the user may enter search criteria to find application(s) that require their organization’s action.



2. After the users have selected all their search criteria, they may click on the “Search for Applications” button located on the bottom of the Work Queue search screen.



# 8.1 View Work Queue Search Results

After the SEP user conducts a successful search, the work queue search results will appear in the window. Search results will display as a list of application(s) in alphabetical order and by Veteran’s last name. Users may not edit, add, nor delete information in the SEP work queue.

- **Note:** A  (checkmark) in the “Comments” column indicates that notes have been entered for that application.

**VSO Work Queue**

Use this form to search for pending Veterans' applications in VDC that may require your attention and action.

**Search for Veteran's Applications**

Veterans Service Organization\*  
 American Legion  
 Disabled American Veterans

Application Status\*  
 Pending VSO Review  
 Pending Additional VSO Review & Action  
 Pending Veteran Review  
 Open

File Number Terminal Digits  
 Enter a Range (two digits each):  
 From 00 to 99  
 (e.g., From 00 to 29 or 10 to 10)

Work Queue Help  
 Searches return Veteran application records that match your search criteria, designate you as their representative for VA claims, and meet the approved permission level.

Claimant's Location Type  
 Select All  
 Domestic  
 Military  
 International

Days Until Expiration  
 61-90 days

Search for Applications Clear

**Work Queue Search Results**

By default, applications are sorted in ascending order by the number of days until expiration.  
 Showing 1-1 of 1 Search Results

Veteran Name	Expires	File Number	Application	Status	Last Updated	Comments
Rhodes, Gregory R	89 days	XXX-XX-3728	Disability Compensation	Open	03/19/2014	

To view detailed information for a specific application, click onto the link with the Veteran's name.

**Application For: Buckley, Brandon**

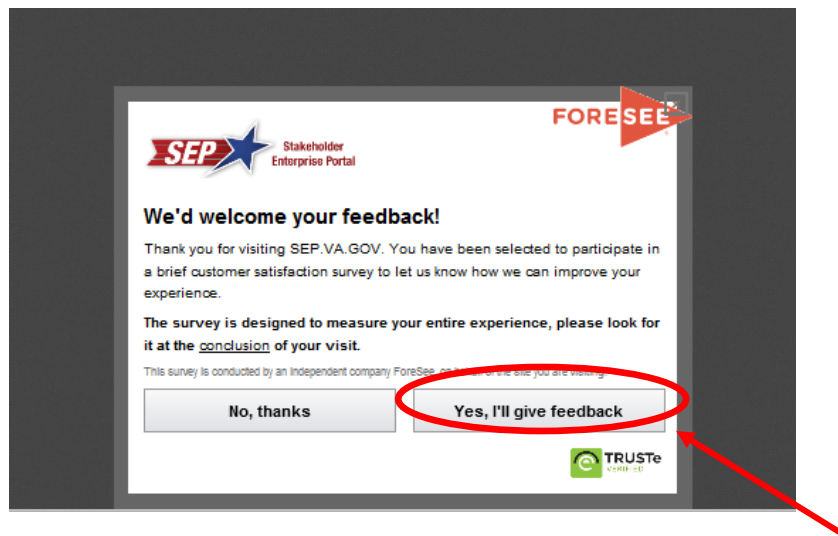
Application Information		Comments:
Veteran's Name	Buckley, Brandon	No Comments Available for this Veteran.
Address	5400 E KELLOGG DR WICHITA, KS 67218	
File Number	60-002-914	
Application	Disability Compensation	
Status	Pending VSO Review	
Last Updated	04/07/2014 17:01:40 CDT	
Created	04/03/2014 15:54:29 CDT	
Expires	04/03/2015 15:54:29 CDT	
Represented By	American Legion	

Print-Friendly View Close

## 9.0 SEP ForeSee Survey

In order to ensure that we are providing the best customer service experience possible, we have partnered with ForeSee to include a random survey as part of the user's SEP experience.

If you are randomly selected to take part in the survey, a window will appear requesting the user's feedback before exiting the SEP portal. If you are not selected but want to give feedback and complete the survey, please direct your comments and questions to: [vrmssep.vbaco@va.gov](mailto:vrmssep.vbaco@va.gov). Note that there are a total of 24 questions in the survey; and to complete and submit a survey, the selected survey participant must complete all of the questions and click onto the "Submit" button.





## Customer Satisfaction Survey

Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

Required questions are denoted by an \*



<p>1: *Please rate the <b>convenient placement of the website tools</b> on this site.</p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>2: *Please rate the <b>variety of website tools</b> on this site.</p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>3: *Please rate the <b>balance of graphics and text</b> on this site.</p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>4: *Please rate the <b>readability of the pages</b> on this site.</p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>5: *Please rate the <b>options available for navigating</b> this site.</p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>6: *Please rate <b>how well the site layout helps you find what you need.</b></p> <p>1=Poor 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Excellent=10 Don't Know ⊙</p>
<p>7: *What is your <b>overall satisfaction</b> with this site?</p> <p>1=Very Dissatisfied 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Very Satisfied=10</p>
<p>8: *How well does this site <b>meet your expectations?</b></p> <p>1=Falls Short 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Exceeds=10</p>
<p>9: *How does this site <b>compare to your idea of an ideal website?</b></p> <p>1=Not Very Close 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Very Close=10</p>
<p>10: *How likely are you to <b>return to this site?</b></p> <p>1=Very Unlikely 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Very Likely=10</p>
<p>11: *How likely are you to <b>recommend the Stakeholder Enterprise Portal to someone else?</b></p> <p>1=Very Unlikely 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Very Likely=10</p>
<p>12: *How likely are you to use this site as your <b>primary resource for obtaining information from this organization?</b></p> <p>1=Very Unlikely 1 2 3 4 5 6 7 8 9 10 ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙</p> <p>Very Likely=10</p>

13: \*How likely are you to **use this site rather than seeking information from other channels?**

1=Very Unlikely  
1 2 3 4 5 6 7 8 9 10  
⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙ ⊙

Very Likely=10

14: \*Which of the following best describes your role in visiting the Stakeholder Enterprise Portal (SEP) site today? (Select all that apply)

- Veteran Service Organization (VSO)
- Education Provider
- Doctor or Other Health Care Provider
- Attorney
- Loan Appraiser
- Benefit Provider
- Other, please specify:

15: \*How frequently do you visit this site?

- First time
- Daily
- About once a week
- About once a month
- About once or twice a year
- Less frequently than once a year

16: \*For which reasons did you visit the SEP site today? (Select all that apply)

- Access information
- Submit claims on my own behalf
- Submit claims on a veteran's behalf
- Apply for benefits
- Check the status of a claim for benefits
- Check the status of an appeal for a claim for benefits
- Check the status of a benefit payment
- To view a veteran's benefit payment history
- Obtain a benefit verification letter
- Change my profile (e.g., change contact information)
- Just browsing/Curious what site offered
- Other, please specify:

17: \*Which of the following areas of the SEP site did you visit today? (Select all that apply)

- Compensation Service
- Education Service
- Purchased Care @ Health Administration Center (PC@HAC)
- Vocational Rehabilitation & Employment (VR&E)
- Veterans Service Organizations (VSO)
- FAQs
- KnowVA
- FAST Letters (1996 - Present)
- Learn More About SEP
- Other section not listed above
- Not sure

18: \*Did you accomplish what you wanted to on the site today?

- Yes
- Partially
- No
- I wasn't planning to accomplish anything in particular

19: \*Did you try to log in on this site today?

Yes

No

20: Thinking about the SEP homepage, was it clear where you needed to go to find what you were looking for today?

Yes

No

21: How would you describe your navigation experience on the SEP site today? (Select all that apply)

I had **no** difficulty navigating/browsing on this site

Too many links/navigational options to choose from

Links often did not take me where I expected

Had difficulty finding relevant information/products

Could not navigate back to previous information

Links/labels are difficult to understand

Had technical difficulties (error messages, broken links, etc.)

I had a navigation difficulty **not listed** above

22: \*Are you aware of the VA Transformation Plan?

Yes

No

Not Sure

23: \*How likely are you to **discourage** others from using the Stakeholder Enterprise Portal?

1 = Very Unlikely					Very Likely = 10				
1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24: If you could identify one improvement to this site, what improvement would you suggest?

1,000 Characters Remaining

Thank you for taking our survey - and for helping us serve you better.  
We appreciate your input!



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