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

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1.0 Overview

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

This manual serves as a step-by-step guide for the various features of the system. It will be updated as new functionalities are made 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).

1.1 Hardware, Software and Identification Pre-Check

SEP requires specific hardware and software to operate correctly. The following requirements are necessary for all users of SEP. Note: Accredited users of SEP must have had the required security training and privacy training prior to using SEP.

1. Operating Systems: Windows XP or Windows 7
   a. How to check: Right Click “My Computer” → Select “Properties”
2. Internet Browsers: Internet Explorer v9, v10, v11, Firefox and Google Chrome.
   a. How to check: Open Internet Explorer. Click on “Tools” → Select “Help” → Select the “About” icon to display the version of IE running on system.
3. ActivIdentity (v 6.2 for Windows 7) card reading software (required only for users logging in with a PIV card):
   a. How to check for this software: Select “Start” → Select “All Programs” → Look for “ActivIdentity” → Select “User Console” and double click to open program → Then from the title bar select “Help” → Select “About” and look for the version of software.
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, usually located either on side of laptop or, if using a desktop, there is usually a slot on the keyboard (required only for users logging in with a PIV card)

6. Identify your Office of General Counsel (OGC) Accreditation number. Directions to obtain your OGC accreditation number:
   a. Proceed to the following URL: [http://www.va.gov/ogc/apps/accreditation/index.asp](http://www.va.gov/ogc/apps/accreditation/index.asp) and select the appropriate dialog box. Then enter your last name in the last name field and select the search button.
   b. If you’re in the OGC Database then you should be presented with your Accreditation Number (Labeled Registration Number on OGC search) when you click on your name. You will need to enter this Accreditation (registration) number in the OGC Accreditation field once you login to SEP.
   c. If the the user is not in the OCG database, her or she must contact the OGC at ogcaccreditationmailbox@va.gov.

7. VA Local Area Network (LAN) ID / VA Computer Login ID (required only for users logging in with a PIV card).
a. To obtain your LAN ID, open Microsoft Outlook, select New Mail, in the “To” field enter your name and on the “To” field - double click on your name to bring up the properties box of your email address and copy down the information displayed in the Alias section.

8. Station Number (required only for users logging in with a PIV card). Please ask your supervisor or IT support person if you do not know your station code/RO number.
2.0 Instructions on how to clear your Cache

For security and privacy reasons, please clear your Internet Browser cache on a regular basis.

1. Open your Internet Explorer

2. Click on Tools from the top menu bar and access Internet Options.
3. Click Delete, which clears all the history, cookies and Cache
4. Select the check boxes for what you want to delete. Click delete.
   a. If users are on the VA’s secure network, there is no option to delete browser history.
   b. If users are on an external network, select the check box next to browser history to delete.

5. Close the pop-up.
3.0 Account Creation & Log-In

Accredited users can create accounts using their Personal Identity Verification (PIV) cards or using the Norton Symantec Remote Identity Proofing process. Login procedures for process are detailed in this user guide or in the Norton Job Aid on the SEP website.

3.1 Unauthenticated Chat

The chat feature allows any SEP user to communicate with the National Call Center agents directly during their session. Users may communicate through a chat window from the SEP home page. This feature allows the user to ask general questions, and is only available if the user is not logged in to SEP. Any sensitive or Personally Identifying Information should not be provided during the chat session.

1. When an SEP user selects a page on SEP where chat is an available option, the representative will be able to initiate a chat session with a National Call Center agent for assistance.
2. When accessing the log in page, click on the blue chat box.

Access to Chat on SEP Login Screen
a. A separate chat box will appear.

3. The user will enter his/her name and question in the pertinent text boxes and click ‘Start Chat’. **NOTE:** Personal Identifying Information (PII) such as a social security number or date of birth cannot be entered into the chat window by the user or by the SEP chat agent.

4. A chat agent will receive the message and initiate contact.
5. When finished with the chat session, users can click the large ‘X’ at the top of the chat window.
6. SEP Users then click ‘OK’ to end the session.

7. As a final step, the user will be asked to complete a survey and click ‘Send.’
3.2 Register with PIV

**NOTE:** YOU MUST USE INTERNET EXPLORER WHEN YOU USE THE PKI.

1. Ensure that your PIV card works prior to starting these steps. We suggest logging in with PIV or locking and unlocking system to ensure reader is working well with PIV and PIN.
2. Insert your PIV card into your card reader.
3. Launch ActivClient console from the Windows Start menu.
4. Click on “Tools” → “Advanced” → “Make Certificates Available To Windows.”
5. Close ActivClient.
7. You will then be asked to choose the certificate (it must be a valid certificate date). When you hover over your name, it should say PIV Authentication Key. Select that Certificate and click “OK.” Most users can pick the second one.
   a. **Note:** Please do not choose the one with the ribbon on it. If you get an error with one certificate, select the other one.
8. You will need to enter your PIV PIN.

9. Click “Register Smart Card” on the right-hand side of the screen. After successful registration, your name will appear on the left-hand side of the page with a message that indicates that you have registered successfully.

**Need to obtain ActivClient? See our FAQ on how to download ActivClient courtesy of the VA**

**Need more help? Check out our Frequently Asked Questions (FAQ) on PIV Login**
3.3 Register with Remote Identity Proofing: Obtain Symantec Credentials

1. In addition to using a PIV card, users can login to SEP with a credential provided by Symantec.
2. Open a new browser session and go to https://www.sep.va.gov.
3. Click on the login button. It should take you to the SEP login page.

4. Select the Login with Norton option. It should open the Symantec/Norton Account Sign In Page.

**NOTE: To complete Norton registration process, please follow the instructions in the Symantec Credential User Guide, which is available on the FAQ page of SEP. Additionally, the link is:**


**Need more help? Check out our FAQ’s on Norton Symantec Login**
3.4 SEP User Login

1. Open a new browser session and go to https://www.sep.va.gov.
2. Click on the login button. You will be taken to the SEP login page.

3. You can either login with a PIV card or login with Symantec. If you login with a PIV card, SEP will ask you for your PIV credentials and PIN number via ActivClient; if you login through Symantec, you will be redirected to the Symantec login page where you will provide your credentials.

4. After successfully logging in with either a PIV or Symantec, the user is directed to the SEP web application as a logged-in user (based upon the user’s credentials as a VSO, Claims Agent or Attorney), which will be reflected in the upper right hand corner of the SEP browser screen:

5. The user is then presented with a dialog box. Select the user role from the drop down list box. The example here is for a VSO Representative:
6. A new dialog box should display. PIV card users will see this:

![Welcome to SEP dialog box](image)

7. Symantec credential users will see this and there is a separate Norton User guide for:

![Welcome to SEP dialog box](image)

8. Enter your OGC Accreditation (Registration) number.
9. For PIV card users only, enter your VA LAN ID (sometimes called VA Login ID).
10. For PIV card users only, enter your station number in the “Station Number” field.
11. Select the “Next >>” button.

12. After selecting the “OK” button, you will be brought to a screen that displays all of your User Roles and POA associations.
13. Click on the “Finish” button.

14. You will be brought to the Dashboard screen after logging in. This screen is also the Veteran Search Page. (In the upper right-hand corner of this page is the VSO dedicated phone number. Please call this number for additional help.)

**Need more help? Check out our FAQ’s on SEP Login**
4.0 Managing 21-22s

1. Only accredited VSO users who have been designated to accept or decline 21-22 requests will be able to do so through SEP.
2. To search for, manage, and review incoming 21-22s, the accredited user selects the “Representation Requests” option in the navigation bar.

4.1 Search for 21-22s

1. From the 21-22 search screen, the accredited VSO User can enter a combination of criteria to search for 21-22s from Veterans who have requested him/her as a representative.

   Requested Organization and Requested Status are required to conduct a search.
b. If the user only represents one Organization, there will not be a select box for Requested Organization; their single Organization will already be selected for them.

c. A search can be conducted for 21-22s in a New, Pending, Accepted, or Declined status; a search can also be conducted for Withdrawn POAs.

d. It is not possible to conduct a search that includes both of these types of search parameters (Withdrawn and non-Withdrawn).

e. If searching for New, Pending, Accepted, or Declined 21-22s, the user can narrow by U.S. State/ Territory. When one U.S. State is selected, the user can type in a city name (or multiple city names, separated by commas).

f. It is not possible to search by city name when more than one U.S. State is selected. Please ensure that the city name is spelled correctly, as there is currently no spell-checker.

g. If searching for Withdrawn POAs, the user can narrow by date range and select a beginning and end date. We recommend restricting this range to a week or smaller to ensure the timeliness of the search process.
h. Selected search criteria can be previewed by hovering the “i” icon in the select-box.

i. If valid criteria are met (as defined above), a set of either 21-22s or Withdrawn POAs will be returned and shown in a table below the search form.
j. For 21-22s, information about the Veteran, Claimant, and whether or not there are limitations of consent is indicated. If a VSO decision was made, the responsible VSO representative name is listed along with the decision date.

k. If viewing a declined 21-22 result, hovering over the “i” icon shows the reason the 21-22 was declined by the VSO representative.

l. Clicking the Veteran name will open the 21-22 Detail page.

m. For Withdrawn POAs, only Veteran and Claimant information is provided; there is no detail or even a detail page. POA is considered withdrawn when a Veteran removes the organization as POA or requests POA through another organization.

n. In the event that there are many 21-22 search results, there are links to open more pages below the table of search results.
4.2 Save a Search/Recall Saved Search

1. Accredited VSO Users might find it helpful to save frequently used searches for later.
   a. After running a search, selecting the ‘Save this search’ option will allow the user to name their particular search and save it to the list of saved searches.

   ![Image of save search dialog]

   b. Up to ten searches can be saved per user and these searches are only visible to the VSO representative that saved the search.

   ![Image of saved search form]

   c. To recall the parameters of a saved search, select the saved search on the right of the search form.

   d. The search form will now be populated with the saved search criteria and the user can simply run their search without entering the criteria.
2. Saved searches can be deleted by hovering near the saved search name and selecting the Delete option. This is helpful when the list of saved searches is approaching the specified limit of ten searches.
4.3 View 21-22 Detail

1. The detail of a 21-22 can help the Accredited VSO User make a decision. Information on the detail page includes: Veteran information, Claimant Information, Limitations of Consent, Address Update Authorization, etc.

<table>
<thead>
<tr>
<th>Detail for: 6/30/2012 New Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capone, Anthony Jay requesting AMVETS</td>
</tr>
</tbody>
</table>

- **Action:** Accept Request - or - Decline Request
- **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

- a. The status of the 21-22 is very important.
- b. A ‘new’ status indicates that the user is the first to view this new 21-22 (no prior user has looked at the details).
- c. A ‘pending’ status indicates that other users have reviewed the 21-22 but did not make a decision on it.
- d. The ‘accepted’ and ‘declined’ statuses are self-explanatory. With each of these, the user that made a decision is listed, as well as the date and time of the decision.
4.4 Accept or Decline 21-22

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

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

| Action: | ACCEPT REQUEST -or- DECLINE REQUEST | Go back to search results |

   a. To accept a 21-22, select the ‘Accept’ option at the top of the detail screen.

3. Note: Clicking the “Confirm” option validates the user’s identity of and acts as the user’s virtual signature on this acceptance.

   a. After confirming the acceptance of the 21-22, the detail page will reload and show the new status.

   b. NEW: SEP will now be able to notify the Veteran in the Secure Messaging center of their eBenefits account that their 21-22 request was accepted.

   c. The user can now return to the 21-22 search results screen and evaluate other 21-22 requests.

4. To decline a 21-22, select the ‘Decline’ option at the top of the detail screen.
a. A reason for why this 21-22 is declined must be specified by the VSO representative. After entering a reason, the VSO can confirm the decline action.

5. After confirming the decline action on the 21-22, the detail page will reload and show the new status.

   a. **NEW:** SEP will now be able to notify the Veteran in the Secure Messaging center of their eBenefits account that their 21-22 request was declined.

   b. The VSO Representative can now return to the 21-22 search results screen and evaluate other 21-22 requests.

**Need more help? Check out our FAQ’s on accepting and rejecting 21-22’s **
5.0 SEP Dashboard

After successfully logging in, the user is automatically directed to the Search for Veterans page, also known as the SEP Dashboard. As a VSO user, the SEP VSO Representative Dashboard will look like this:

As an Attorney or Claim Agent User, the Representative Dashboard will look like this:
5.1 Veteran Search

Veteran Search enables users to search for a Veteran using additional search criteria; this enables them to locate the specific person for whom they have POA authority to represent, in order to manage VA-related business.

1. From the SEP Dashboard screen, enter the Veteran’s Social Security Number, File Number, Service Number or Insurance Number. Only one is necessary.
   a. If valid criteria are met, a Veteran record from the web service and several data elements for the Veteran will be returned.

2. Users will click the ‘Advanced Search Criteria’ if they need more options to find a Veteran. The Advanced Search Criteria option provides additional search criteria fields.

   **Note:** There are fields that have been added such as Service Number, Insurance Number, First, Middle, Last and Date of Birth.
3. After users enter the information as prompted by the screen instructions, they click ‘Search for Veterans’.

4. If they choose ‘Clear Form’, all information entered in the fields is automatically cleared, and the user remains on the Dashboard screen.

**Need more help? Check out our FAQ’s on Veteran searches **

### 5.2 Claim Status

1. An SEP user is allowed to view the Claim Status of Veterans who have granted them Power of Attorney (POA). A Veteran must also have authorized the VSO, Attorney or Claim Agent to view health information via VA Form 21-22.

   a. To see the Claim Status of an individual, the approved Representative selects the “Claim Status” option from the “Actions” drop-down menu. The “Actions” drop-down menu is found in the “Veteran Search Results.”
b. The system presents a default Claim Status page. A current summary of open claims is displayed as well as historical claims, if they are available.
2. To see the details of an individual claim, the approved user selects the date of the claim. The system then presents a Claim Detail page. The Claim Detail page lists the status of the selected claim in timeline format.

3. Beneath the timeline, the system presents a “Next Steps” text box, which lists the remaining steps the user must take in order to complete the claim.
4. The bottom section contains items that the VA has requested from the Veteran. These items are generally supporting documentation for the respective claim and are required (unless otherwise indicated) in order to fulfill it.

**Need more help? Check out our FAQ on Disability Questionnaires (DBQ’s)**
5. The items highlighted in yellow are urgent or past due.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status Details</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/22/2013</td>
<td>At this time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>PENDING</td>
<td>Appeal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DECISION</td>
<td>APPROVAL</td>
</tr>
<tr>
<td>04/21/2013</td>
<td>01/20/2014 to 12/09/2014</td>
<td>GATHERING</td>
<td>Compensation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OF EVIDENCE</td>
<td>Evidence Needed from You</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Evidence Requested is Past Due</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Development Letter Sent!</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Upload Documentation</td>
</tr>
<tr>
<td>04/20/2013</td>
<td>At this time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>GATHERING</td>
<td>Dependency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OF EVIDENCE</td>
<td></td>
</tr>
<tr>
<td>04/12/2013</td>
<td>At this time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>GATHERING</td>
<td>Compensation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OF EVIDENCE</td>
<td>Evidence Needed from You</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Evidence Requested is Past Due</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Development Letter Sent!</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Upload Documentation</td>
</tr>
</tbody>
</table>

5.3 View DIC Claims Status as an SEP User

1. SEP Users can view claims status on Dependency and Indemnity Compensation claims to track progress. They can view the claims status summary and detail pages for a Veteran for whom they have POA authority.

2. SEP Users can also view the status, claims status summary and detail information for the Dependency, Initial S/C Death, Initial S/C Death or Pension and New or Re-opened DIC claims types.

**Note:** The spouse or dependent must also be a Veteran in order to be represented by the user, and the spouse or dependent must have previously submitted DIC claims.
### SEP Claims Status Summary Screen

3. Users click on the link for the 'Date of Claim' to view detailed information for that claim.
5.4 Payment History

1. An SEP user is allowed to perform several functions on behalf of the Veteran for whom they have POA. The first function that is available is Payment History.

2. To view payment history for Veterans, select the “Payment History” from the “Actions” drop-down. The “Actions” drop-down is found in the “Veteran Search Results” section.
a. The system presents default view for payments with a date range from January of the current year to the present month.

b. Returned Payments are also displayed if they are available, with their own date range controls (drop-down lists and slider).
5.5 View DIC Payments as an SEP User

a. SEP users can access the payment history for a Veteran, view Dependency and Indemnity Compensation payments for a Veteran’s surviving spouse or for a dependent of a deceased Veteran for whom they have POA authority.
5.6 View Modifications to Payments as an SEP User

1. SEP users with appropriate POA authority can view modifications made to a Veteran’s payment history. This will help them explain to a Veteran how the net payment amount resulted from the gross payment amount.

2. SEP users initially view a summary of payments and returned payments; from that view, they may select a specific payment to see more details for that payment.

3. Payment details include reductions and/or increases from the gross payment, as well as bank or check payment information.

4. A change has been made in the disclaimer notice, and a new ‘Return Date’ column has been added on the payment summary page for returned payments.
5. A new ‘Payment Returned Date’ row has also been added on the payment summary page for returned payments.

### Details on your Retroactive - C&P Payment

<table>
<thead>
<tr>
<th>Details</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Payment Amount</td>
<td>$845.00</td>
</tr>
<tr>
<td>Payment Date</td>
<td>09/08/2011</td>
</tr>
<tr>
<td>Payment Returned Date</td>
<td>09/22/2011</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Retroactive - C&amp;P</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Mailed Check</td>
</tr>
<tr>
<td>Check / Trace Number</td>
<td>1313133</td>
</tr>
<tr>
<td>Check Recipient</td>
<td>TANYA WILLIS</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>8845 BAILEY LANE</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>FAIRFAX VA</td>
</tr>
<tr>
<td>Zip Code</td>
<td>22031</td>
</tr>
</tbody>
</table>

### About Returned 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 your online payment history. Gross payments and modifications will display only for regular and irregular compensation payments. If you have questions about payments made by VA please call the VA Help Desk at 1-800-827-1000.

Six Years Available: Returned payment information is available for 6 years from the date the payment was issued.

Before Reporting Non-Receipt: Please wait at least 3 business days (Monday-Friday) before reporting non-receipt of a payment as check tracing cannot be initiated before that period. To report non-receipt after 3 business days call 1-800-827-1000 with the Veteran's Social Security Number or VA Claim Number, the Veteran's address and (for direct deposit payments) the Veteran's account information.

If Check is Found: If the original check is found or received, the Veteran must return the original check to the Treasury Department and await receipt of the replacement check. If both checks are negotiated, then the Veteran will be responsible for the duplicate payment. The Veteran will receive a letter from the Debt Management Center with instructions concerning collection.
5.7 Access Online Forms

1. An SEP User is allowed to access online forms through the Electronic Claims Submission Process dashboard for those Veterans who have granted them Power of Attorney (POA). A Veteran must also have authorized the user to view health information via VA Form 21-22.

   a. To access an individual’s online forms, the approved SEP user selects the “View Online Forms” option from the “Actions” drop-down menu. The “Actions” drop-down menu is found in the Veteran Search Results.

   b. The system presents the Online Application Dashboard of the selected Veteran.
c. A current summary of open, submitted, and completed applications/forms is displayed, as well as the ability to start a new online form. Open applications are displayed in descending order from newest to oldest.

**Note:** The forms available through SEP are the same as those available to the Veteran on eBenefits. SEP users will be able to complete these forms, such as the 21-526, and submit back to the Veteran through eBenefits for the Veteran’s electronic signature and final submission to the VA. Some forms will not require the Veteran’s electronic signature and may be submitted directly by the user.

**Need more help? Check out our FAQ on Available forms in SEP **
6.0 SEP User May Upload Documents on Behalf of a Veteran

1. In order to move benefits claims forward, users may upload documents on behalf of a Veteran for whom they have POA authority.

2. To upload documents for a Veteran, users:
   a. Log into SEP and search for the Claimant’s record.
   b. Select one of the Claimant’s claims from the Compensation and Pension (C&P) Claims Status feature.
   c. Select the “Upload a Document” option.
   d. The Claimant must be a Veteran for whom the user has POA authority. Users search using the Claimant’s identifying information to pull up the corresponding claims.

**Note:** The Claimant must have previously submitted a claim that is *not yet in the “Complete” Phase.*

---

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Type of Evidence</th>
<th>Pending Decision Approval</th>
<th>Upload Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/22/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/23/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Dependency</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/24/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/25/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/26/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/27/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/28/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>04/29/2013</td>
<td>All time, your Regional Office is unable to provide an estimated completion date for this type of claim</td>
<td>Compensation</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

---

**SEP Document Upload**

1. From the Claims Summary Page, once the user selects the ‘Upload Documentation’ link and then the ‘Upload Documentation’ page will be displayed, as illustrated below.
Note: The ‘Requested Items’ may vary from claim to claim, and each claim may have several different items requested.

2. The user clicks the ‘Add a document for this item…’ button. The pop-up window is then shown, prompting the user to select a file to upload from a local device.

3. For each requested item, the user will have the ‘Add a document for this item’ option.

4. The file name of the selected file will appear, along with a drop down menu, as shown below.

5. The user must then select a Label Association for the document from the drop down menu.
6. If the user chooses the wrong file or wants to cancel the file selection for any reason, the ‘Cancel’ button, located next to the filename, should be selected.

7. This will simply remove the file, but the user will remain on the ‘Upload Documentation’ page.

8. When finished selecting documents, the user may click the ‘Submit Documents’ button.
6.1 Alternate Link for Uploading Documents for Internet Explorer (IE) Users

1. If the veterans are using Internet Explorer (IE) browser and are having trouble with uploading documents for their claims. There is a new link ‘Internet Explorer Users Click Here to Add a Document’ available under the ‘Add a document for this item...’ button from the ‘Upload Documentation’ screen as illustrated in the screenshot below.

![Internet Explorer Users Link for Upload Documentation Screen 1](image-url)
Internet Explorer Users Link for Upload Documentation Screen 2
7.0 Submission of 21-526EZ on Behalf of a Veteran

The Electronic Claims Submission System will allow the claimant’s assigned POA the ability to process and potentially submit a Disability Compensation Claim application (VA Form 21-526EZ) and associated documents for the claimant, based on the user’s rights and the claim’s certification status.

The POA can be a National VSO or County VSO. Most NVSOs do not require review and are eligible to submit a valid claim on behalf of the Veteran.

Attorneys and Claim Agents have the same rights as the NVSO that does not require review.

Most CVSOs require review and therefore cannot submit a claim, even claims that have all the necessary certification information. Specifically, an eligible POA may submit a claim to the VA if the Veteran has provided an electronic mark in the presence of a POA Witness who provides their electronic mark as well.

Alternatively, an eligible POA may obtain a wet signature from the Veteran on a 21-526EZ Signature Page and submit that page along with the claim.
7.1 Verify POA When Reopening an Existing 21-526EZ Claim

1. When a representative opens an application that has been previously initiated on behalf of the claimant but has not been submitted, it requires substantiation.

2. Verification must be performed, confirming that a witness mark has been received for the application, or that the Veteran’s 21-526EZ signature page has been uploaded for the application, so that the representative can be confident the application certifications are appropriate for the application.
   a. To complete the verification, click “Continue”.

7.2 Capture Application Certification Information for Accredited Representatives

1. Representatives are provided an opportunity to manage the application certifications in order to electronically submit the application to VA.

2. This can be done as a representative is working on a claimant’s Disability Compensation application for an Original Claim, or a supplemental claim where the Claimant has either Compensation and Pension (C&P) email address or an EBN account.

3. After representatives complete the Getting Started page they are then are provided an opportunity to manage the application certifications to record the application certification information (i.e. Veteran’s Mark, Witness Signature, and 21-526EZ Signature Page), in order to submit the application electronically to VA.
7.3 Original Claim Submission

VSO’s will follow the same process to prepare claims in SEP as they have previously. Upon completing the preparation stages of a claim, and once they are ready to submit, the system must verify that the VSO has permission to submit the application on the Veteran’s behalf. The system will look for either an “Uploaded Signed Signature Page” or the “Claimant and Witness Mark.”

1. **Uploaded Signature Page**: One avenue for a VSO to submit a claim on behalf of the Veteran is to upload a signed signature page. You have the ability to download, print, sign and scan the claim certification from SEP:

![Claim Signature or Mark](image)

2. **Claimant and Witness Mark**: Another option for VSOs to submit a claim on behalf of the Veteran is by obtaining the Claimant and Witness Marks. Capturing these marks electronically is equivalent to the paper method of a Veteran providing a mark or thumb print with a witness verification to sign their claim because the Veteran is unable to sign his/her name.

3. When completing the Claimant and Witness Mark section of the application, the VSO will need to:
   a. Read the claimant mark statement to the Veteran
   b. Veteran provides his electronic mark “X”;
   c. VSO provides his electronic witness signature by checking the box certifying the he saw the Veteran make an electronic mark.
Reminder: Users of the Stakeholder Enterprise Portal (SEP) (1) must continue to comply with the rules of behavior for their computer; and (2) must be present when the Veteran is checking the claimant mark.

1. At the end of the 21-526EZ application, VSO’s will have options to either
   a. Submit on Behalf of Veteran or
   b. Send for Veteran Review. If the NVSO received the application for review from a CVSO requiring review, there will be a 3rd option of “Return for Additional VSO Review and Action”.

Submission Options

1. Submission Option for NVSOs Receiving Application from CVSO for Review:

   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 or return the application for additional Veteran Service Organization (VSO) review and action.

   **What would you like to do next?**
   ◦ Submit on Behalf of Veteran
   ◦ Send for Veteran Review
   ◦ Return for Additional VSO Review and Action

   Save & Continue   Previous
2. Submission Option for Applications not Requiring Review:

3. A submission confirmation page will be displayed after a representative has successfully submitted the claim on behalf of the Veteran.
Post-Submission of Original Claims

1. If the application is submitted by the VSO representative on behalf of the Veteran, the claimant and witness marks will be captured on the pdf version of the application as shown in the screen shot below:

   ![Screen Shot of Application]

   **SECTION VI: WITNESSES TO SIGNATURE**

   **23A. SIGNATURE OF WITNESS (if veteran signed above using an “X”)**
   **23B. PRINTED NAME AND ADDRESS OF WITNESS**

   **AFFIDAVIT ACT NOTICE**: The forms will be used to determine allocation of compensation benefits. (38 U.S.C. 3106). The witnesses you submit are considered confidential (38 U.S.C. 3106). 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 name and relationship of the witness is required on each of the forms. (38 U.S.C. 5102). Compensation, Pension, Education, and Survivors’ Benefits and Employment Assistance. 115, published in the Federal Register. The requested information is considered relevant and necessary to determine certain benefits under the law. Information submitted is subject to verification through nonmedical techniques or other means. Your signature is not required.

2. There will also be confirmation of VSO claims submission on the top left header of the application as shown in the screen shot below:

   ![Screen Shot of Application]

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

   **Department of**

   7.4 Supplemental Claim Submission

   The claimant and witness mark or uploaded signed signature page is only required on supplemental claim submission when the Veteran does not have an eBenefits account or email address on record in VA systems. Submission of a supplemental claim for a Veteran who does have an eBenefits account or email address on record does not require the claimant and witness mark or uploaded signed signature page to be completed.

   1. If the Veteran does not have an eBenefits account or email address on record, then the steps outlined for original claim submission must be followed.

   2. If a VSO tries to submit a supplemental claim for benefits when the Veteran does not have an eBenefits account, there is not an email address on record, the signed signature page was not uploaded, or the claimant and witness mark section was not checked, the VSO will be presented with the message shown below.

   ![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

   3. If the VSO chooses to “Send for Veteran Review,” then a temporary email address can be entered and the Veteran will receive notification that a draft of the Compensation Benefits Application has been completed.
8.0 SEP Work Queue

1. VSO Users will now have access to a work queue that displays a list of applications in the Online Applications Dashboard that are pending and may require attention from the user.

   a. Once the users login into the Stakeholder Enterprise Portal (SEP), they can access the Work Queue by clicking on the ‘Work Queue’ link on the menu bar.

   ![Stakeholder Enterprise Portal Work Queue Link](image)

   b. After users click the ‘Work Queue’ link, the Work Queue search criteria screen is displayed; this allows the user to enter search criteria to find work items that pertain to their organization and/or location.
7. Once the user selects the search criteria, they will need to click on the ‘Search for Applications’ button on the bottom of the Work Queue search screen.

**Note:** Based on the radio button option selected for the ‘Claimant’s Location Type’, additional search criteria fields will be displayed for the users.
8.1 View Work Queue Search Results

1. SEP Users can view a list of applications under the ‘Work Queue Search Results’ window that fulfill the search criteria entered on the Work Queue search screen.

![Work Queue Search Results Screen]

2. Users can click on the link for the ‘Veteran's Name’ to view detailed information for that application and veteran.

   **Note:** A ‘Checkmark’ sign in the ‘Comments’ column indicates that notes have been entered for that application.
### Application For: Buckley, Brandon

**Application Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veteran’s Name</td>
<td>Buckley, Brandon</td>
</tr>
<tr>
<td>Address</td>
<td>5400 E KELLOGG DR</td>
</tr>
<tr>
<td></td>
<td>WICHITA, KS 67218</td>
</tr>
<tr>
<td>File Number</td>
<td>03-002-914</td>
</tr>
<tr>
<td>Application</td>
<td>Disability Compensation</td>
</tr>
<tr>
<td>Status</td>
<td>Pending VSO Review</td>
</tr>
<tr>
<td>Last Updated</td>
<td>04/07/2014 17:01:40 CDT</td>
</tr>
<tr>
<td>Created</td>
<td>04/03/2014 15:54:29 CDT</td>
</tr>
<tr>
<td>Expires</td>
<td>04/03/2015 15:54:29 CDT</td>
</tr>
<tr>
<td>Represented By</td>
<td>American Legion</td>
</tr>
</tbody>
</table>

**Comments:**

No Comments Available for this Veteran.

---

**Note:** VSO Work Queue displays summary information in read-only format, and users may not select an application for direct entry into VDC to complete the application.
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 survey as part of the user’s SEP experience.

1. If selected to take part in the survey, a window will appear requesting feedback from the user when finished using SEP.
   a. If a user is not selected to complete the survey, but still wants to give feedback, they can direct their comments and questions to: vrmsep.vbaco@va.gov

2. There are 24 questions in the survey. The user must complete all the questions, include comments if preferred and then hit submit.
### 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 *.

<table>
<thead>
<tr>
<th>Question</th>
<th>Rating Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: *Please rate the convenient placement of the website tools on this site.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>2: *Please rate the variety of website tools on this site.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>3: *Please rate the balance of graphics and text on this site.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>4: *Please rate the readability of the pages on this site.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>5: *Please rate the options available for navigating this site.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>6: *Please rate how well the site layout helps you find what you need.</td>
<td>1=Very Poor 2= Poor 3= Fair 4= Good 5=Very Good 6= Excellent 7= Don't Know</td>
</tr>
<tr>
<td>7: *What is your overall satisfaction with this site?</td>
<td>1=Very Dissatisfied 2= Dissatisfied 3= Neither 4= Satisfied 5= Very Satisfied</td>
</tr>
<tr>
<td>8: *How well does this site meet your expectations?</td>
<td>1=Far Short 2= Short 3= Fair 4= Long 5= Very Long</td>
</tr>
<tr>
<td>9: *How does this site compare to your idea of an ideal website?</td>
<td>1=Not Very Close 2= Close 3= Fair 4= Very Close</td>
</tr>
<tr>
<td>10: *How likely are you to return to this site?</td>
<td>1=Very Unlikely 2= Unlikely 3= Neither 4= Likely 5=Very Likely</td>
</tr>
<tr>
<td>11: *How likely are you to recommend the Stakeholder Enterprise Portal to someone else?</td>
<td>1=Very Unlikely 2= Unlikely 3= Neither 4= Likely 5=Very Likely</td>
</tr>
<tr>
<td>12: *How likely are you to use this site as your primary resource for obtaining information from this organization?</td>
<td>1=Very Unlikely 2= Unlikely 3= Neither 4= Likely 5=Very Likely</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>13: *How likely are you to use this site rather than seeking information from other channels?</td>
<td>1 = Very Unlikely 2 = Unlikely 3 = Neither 4 = Likely 5 = Very Likely</td>
</tr>
<tr>
<td>14: Which of the following best describes your role in visiting the Stakeholder Enterprise Portal (SEP) site today? (Select all that apply)</td>
<td>Veteran Service Organization (VSO)  Education Provider  Doctor or Other Health Care Provider  Attorney  Loan Appraiser  Benefit Provider  Other, please specify</td>
</tr>
<tr>
<td>15: *How frequently do you visit this site?</td>
<td>First time  Daily  About once a week  About once a month  About once or twice a year  Less frequently than once a year</td>
</tr>
<tr>
<td>16: *For which reasons did you visit the SEP site today? (Select all that apply)</td>
<td>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</td>
</tr>
<tr>
<td>17: *Which of the following areas of the SEP site did you visit today? (Select all that apply)</td>
<td>Compensation Service  Education Service  Purchased Care @ Health Administration Center (PC@HAC)  Vocational Rehabilitation &amp; Employment (VR&amp;E)  Veterans Service Organizations (VSO)  FAQs  KnowVA  FAST Letters (1956 - Present)  Learn More About SEP  Other section not listed above  Not sure</td>
</tr>
<tr>
<td>18: *Did you accomplish what you wanted to on the site today?</td>
<td>Yes  Partially  No  I wasn't planning to accomplish anything in particular</td>
</tr>
</tbody>
</table>
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
2
3
4
5
6
7
8
9
10 = Very Likely

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

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

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