### Section C. System Updates

### Overview

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| **In This Section** | This section contains the following: |

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| **Topic** | **Topic Name** |
| 1 | Change of Address and Direct Deposit Processing |
| 2 | Change of Name Processing |
| 3 | Processing Third Party Information Requests |
| 4 | Handling Power of Attorney (POA) Appointments |
| 5 | Updating Electronic Systems for POA |
| 6 | POA Codes |
| 7 | Updating Military Service Information |

**1. Change of Address and Direct Deposit Processing**

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| **Introduction** | This topic covers information on changing claimant’s address or direct deposit information in Share or the Veterans Benefits Management System (VBMS), including   * receiving notice of change of address or direct deposit * updating the address in VBMS * updating the address and/or direct deposit information in Share, and * homeless Veteran address resources. |

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| **Change Date** | July 11, 2015 |

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| **a. Receiving Notice of a Change of Address or Direct Deposit** | Change of address/direct deposit notification may come in multiple formats including   * a signed statement from the claimant * undeliverable mail with the United States Post Office (USPS) forwarding address sticker affixed to the envelope * *VA Form 20-572, Request for Change of Address/Cancellation of Direct Deposit*, and * other Department of Veterans Affairs (VA) forms that contain the information.   ***Important***:   * For any claimant assigned a fiduciary ***do*** ***not*** * change the address * establish a direct deposit account, or * change a direct deposit account. * An address change request is to be sent to the Fiduciary Hub of jurisdiction via Veterans Assistance Inquiry (VAI).   ***Notes***:   * Update addresses in the Veterans Benefits Management System (VBMS) or Share. VBMS release 8.0 added functionality to automatically update the corporate record in Share. * Update direct deposit information only in Share. * An appointed Veterans Service Organization (VSO), agent, or attorney has the legal authority to change a claimant’s address in person, by telephone, or by letter when annotated in * Block 14 of the *VA Form 21-22,* *Appointment of Veterans Service Organization as Claimant's Representative*, or * Block 11 on the *VA Form 21-22a,* *Appointment of Individual as Claimant's Representative*.   ***References***: For more information on   * changing addresses by power of attorneys (POAs) or by fiduciaries (for incompetent Veterans), see M27-1, Part I, 7.5 * undeliverable mail procedures, see M21-1 Part III, Subpart iii, 1.B.3, and * change of address and direct deposit request procedures, see M27-1, Part I, 3.12. |

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| **b. Updating the Address in VBMS** | Follow the steps in the table below to update the address in VBMS. |

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| **Step** | **Action** |
| 1 | Open VBMS and enter the claimant’s claims folder number in the search box. |
| 2 | Select OPEN PROFILE. |
| 3 | Select EDIT VETERAN from the ACTIONS drop down menu.    ***Example***: |
| 4 | Update address and contact information on the UPDATE VETERAN PROFILE screen.  ***Example***: |
| 5 | Once updates are complete select SUBMIT to save the information. |

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| ***Note***: Direct deposit cannot be updated in VBMS. |

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| **c. Updating the Address and/or Direct Deposit Information in Share** | Follow the steps in the below table to   * update the address, and/or * direct deposit information in Share. |

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| **Step** | **Action** |
| 1 | Open Share |
| 2 | * Select the CORPORATE INQUIRIES command * enter the claimant’s information in the FILE NUMBER OR SSN field, and * select SUBMIT.   ***Example***: |
| 3 | * Select the AWARDS/RATINGS tab, and * select the line containing *Mailing* under the ADDRESS TYPE column.   ***Example***: |
| 4 | Compare the address in the system to the address on the change request or USPS forwarding address sticker. Is the address different?   * If *yes*, proceed to Step 6. * If *no*, proceed to the next step. |
| 5 | Does direct deposit need to be updated?   * If *yes,* proceed to Step 8. * If *no*, upload documents to VBMS and proceed Step 10. |
| 6 | * Select the READY button on the lower right of the screen * select CHANGE OF ADDRESS command * choose *Live CPL* (or applicable) in the BENEFIT TYPE field * choose *00 – Veteran* (or applicable) in the PAYEE NUMBER field, and * select SUBMIT.   ***Example***: |
| 7 | When entering or editing the new address   * enter the street address * enter city * enter zip code (if the zip code doesn’t match the city, then Share will prompt you to change the city), and * enter or edit phone numbers.   ***Example***:    ***Note***: If the address has an apartment or unit number, enter it in the ADDRESS 1 box, then enter the street address in the next box. |
| 8 | For entering or editing direct deposit   * enter or edit information in the DIRECT DEPOSIT fields * if the claimant *does not have* direct deposit ensure the USE FOR PAYMENT ADDRESS radio button *is checked*, and * if the claimant *has* direct deposit ensure the USE FOR PAYMENT ADDRESS radio button *is not checked*.   ***Example***: |
| 9 | Select UPDATE. |
| 10 | Update the evidence tab in VBMS for returned mail or address/direct deposit change by   * entering the claims folder number in the search box * selecting the OPEN PROFILE button * selecting MANAGE EVIDENCE from the ACTIONS drop down menu * selecting UPDATE UNSOLICITED * entering the date of receipt as the earliest stamp date on the mail * typing *Returned mail*, *Address change*,or *Direct deposit change* (as applicable) in the DOCUMENT TYPE * selecting ADD EVIDENCE,and * selecting COMPLETE. |

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| **d. Homeless Veteran Address Resources** | Use the following resources when researching a homeless Veteran’s address:   * [Homeless Shelter Directory](http://www.homelessshelterdirectory.org/) * [Regional Office Homeless Coordinator Directory](http://vbaw.vba.va.gov/bas/outreach/Veterans/homeless/home-index.asp), and * [HUD Exchange](https://www.hudexchange.info/grantees/?granteesaction=main.searchresults&programid=3).   ***Reference***: For more information on processing claims for homeless Veterans, see   * M21-1, Part III, Subpart ii, 1.D.2, and * M27-1, Part II, 3. |

**2.** **Change of Name Processing**

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| **Introduction** | This topic contains information on changing a claimant’s name in the systems, including   * evidence required for name changes, and * processing name changes. |

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| **Change Date** | July 11, 2015 |

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| **a. Evidence Required for Name Changes** | Before changing the claimant’s name in the systems, the claimant must have submitted a signed request and sufficient evidence of the legal name change.  ***Reference***: For more information on evidence requirements for name changes, see M21-1, Part III, Subpart iii, 8.1.a. |

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| **b. Processing Name Changes** | Once adequate evidence has been received to change the Veteran or claimants name, follow the steps in the below table to process the change. |

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| **Step** | **Action** |
| 1 | Open Share |
| 2 | Select the BIRLS UPDATE command.  ***Example***: |
| 3 | On the BIRLS UPDATE screen, select the second tab labeled NAME.  ***Example***: |
| 4 | Select the CHANGE (RETAINS OLD AND NEW NAME) radio button. |
| 5 | Enter the new name in the UPDATE NAME fields at the bottom of the screen. |
| 6 | Select UPDATE. |
| 7 | Upload the document to VBMS and add a permanent VBMS note. |

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| ***Note***: Until the Pension Management Centers (PMCs) fully transition to VBMS, substitute uploading documents to Virtual VA (VVA) and adding notes to Modern Awards Processing-Development (MAP-D). |

**3. Processing Third Party Information Requests**

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| **Introduction** | This topic contains information on processing third party information requests, including   * use of *VA Form 21-0845,* *Authorization to Disclose Personal Information to a Third Party* * *VA Form 21-0845* required criteria checklist, and * updating systems for third party disclosure. |

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| **Change Date** | February 11, 2016 |

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| **a. Use of VA Form 21-0845** | *VA Form 21-0845, Authorization to Disclose Personal Information to a Third Party*, allows the National Call Centers (NCCs) and regional offices (ROs) to release specified information normally protected under privacy provisions to family members or other designated persons who are not POAs, agents, or fiduciaries.  ***Note***: A Veteran may only designate one person or one organization on the form. In addition, only one form may be valid at a time.  ***Reference***: For more information on third party release of information, see the M27, Part I, Chapter 7.6 |

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| **b. VA Form 21-0845 Required Criteria Checklist** | To be valid, the *VA Form 21-0845* must contain or meet the following criteria to be considered substantially complete:   * the signature of Veteran/claimant and date * the name and claims folder number of the Veteran/claimant * the contact information (address, daytime or cell phone number, or e-mail address) * the type of information authorized for release * the length of time authorization is valid, if applicable * a security question and answer * the form date stamped by the VA * the form designates only one person or organization, and * if the Veteran has a fiduciary, the signature of the fiduciary.   ***Important***: The signature cannot be someone other than Veteran/claimant except in cases where the Veteran/claimant is incompetent. When the Veteran/claimant is found incompetent, the *VA Form 21-0845* must be signed by a VA appointed fiduciary.  ***Note***: If the form does not contain substantially complete information required to authorize access   * return it with a letter explaining * the reason for the return, and * the block(s) that must be completed, and * add a VBMS or MAP-D note stating *VA Form 21-0845 returned on MM/DD/YY for completion*. |

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| **c. Updating Systems for Third Party Disclosure** | Once the *VA Form 21-0845* is deemed acceptable, follow the steps in the table below to update systems for third party information disclosure. |

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| **Step** | **Action** |
| 1 | Open Share. |
| 2 | * Select the CORPORATE FLASHEScommand on the left side of the screen * enter the claimant’s claims folder number in the FILE NUMBER OR SSN field, and * select SUBMIT. |
| 3 | Verify that *Third Party Release* flash is not shown in the top right field labeled SELECT RO FLASHES*.*  ***Note***: If the flash is already present   * select CANCEL, and * proceed no further. |
| 4 | * Scroll down on the left top box labeled AVAILABLE RO FLASHES and highlight THIRD PARTY RELEASE * select the right arrow between the two upper boxes to move the flash to the right * select submit to save the flash and Share will display *Update Complete*, and * Select OK to return to the READY screen.   ***Example***:  C:\Users\vbacoparrol\Desktop\A - manual project\III.ii.3.C\Share Corp Flash Screen.PNG |
| 5 | Add the following VBMS or MAP-D note:  *VA Form 21-0845, Authorization to Disclose Personal Information to a Third Party, received and of record in favor of:*  [**type the individual named in Block 10 here**].  If the claimant selected a limited time frame for the authorization, also note  *VA Form 21-0845 expires on* [**MM/DD/YYYY**]. |
| 6 | * Upload the *VA Form 21-0845* into the claimant’s electronic claims folder (eFolder), and * following confirmation of a successful upload, shred *VA Form 21-0845*. |

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| ***References***: For more information on   * third party release of information, see M27, Part I, Chapter 7.6, and * centralized mail (CM) intake procedures, see M21-1, Part III, Subpart ii, 1.E. |

**4. Handling POA Appointments**

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| **Introduction** | This topic contains information on handling representative appointment forms, including   * when to process POA appointment forms * endorsing a POA appointment form as limited * acceptable versions of *VA Form 21-22* * reviewing a submitted *VA Form 21-22* or *VA Form 21-22a* * what constitutes a complete *VA Form 21-22* or *VA Form 21-22a* * requests to revoke or change POA * handling an outdated *VA Form 21-22* or *VA Form 21-22a* * handling an incomplete *VA Form 21-22* or *VA Form 21-22a* * processing copies of *VA Form 21-22* or *VA Form 21-22a* with paper claims folders * processing copies of *VA Form 21-22* or *VA Form 21-22a* with eFolders * unclear declaration * handling appointment forms/letters when there is no record of a claims folder, and * validating claims without appointment forms/letters. |

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| **Change Date** | March 17, 2016 |

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| **a. When to Process POA Appointment Forms** | Process representative appointment forms as soon as they are received from the claimant. |

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| **b. Endorsing a POA Appointment Form as Limited** | If a claimant other than the Veteran, such as a surviving spouse/relative or apportionee appoints a representative, the appointment is limited to the claimant only. Limited representation must be clearly noted in order to avoid erroneous referral of the Veteran’s claims folder to the claimant’s representative.  Use the table below to clearly identify limited appointments. |

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| **If processing the POA appointment in a(n) ...** | **Then ...** |
| paper format | endorse the form as limited. |
| electronic format | add a permanent note in VBMS or MAP-D indicating the limited appointment of representation.  ***Note***: In addition to the permanent note, the word *Limited* must be added to the subject line of the POA appointment in the eFolder, once upload has occurred.  ***Reference***: For more information on changing the subject line of a document in an eFolder, see the [VBMS Job Aid – Editing Document Properties](http://vbaw.vba.va.gov/VBMS/Resources_Job_Aids.asp). |

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| **c. Acceptable Versions of VA Form 21-22** | VA ***can*** accept older versions of *VA Form 21-*22 until depletion of existing stock in accordance with M21-1, Part III, Subpart ii, 1.C.7.b. Follow the guidance in M21-1, Part III, Subpart ii, 3.C.4.f, for establishment of representation when an outdated version of the *VA Form 21-22* is received.  *Do not* establish or change a claimant’s representation, unless the form is complete as described in M21-1, Part III, Subpart ii, 3.C.4.e. Follow the guidance in M21-1, Part III, Subpart ii, 3.C.4.g, for establishment of representation when an incomplete *VA Form 21-22* is received.  ***Note***: Always accept older versions of forms submitted via the Stakeholder Enterprise Portal (SEP) and Veterans Online Application (VONAPP) Direct Connect (VDC). The form versions included in Veterans Benefits Administration (VBA) applications for electronic submission may significantly lag behind the release of new form versions.  ***Reference***: For more information on submission of *VA Form 21-22* via SEP/VDC, see M21-1, Part III, Subpart i, 4.B.1.c. |

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| **d. Reviewing a Submitted VA Form 21-22 or VA Form 21-22a** | When reviewing a *VA Form 21-22* or *VA Form 21-22a*   * check the form for compliance with the guidance in M21-1, Part I, 3.B.2.d regarding [38 U.S.C. 7332](http://www.law.cornell.edu/uscode/html/uscode38/usc_sec_38_00007332----000-.html) and authorization for disclosure of protected records * check that the form is complete, as described in M21-1, Part III, Subpart ii, 3.C.4.e * process each copy of the properly completed and current form, and * update electronic systems to reflect the appointment.   ***Notes***:   * A *VA Form 21-22* received as part of an Integrated Disability Evaluation System (IDES) claim must have the word *Veteran* replaced with *Service Member* in Block 1. * If a *VA Form 21-22a* is received without an attorney fee agreement, see M21-1, Part I, 3.C.   ***References***: For more information on   * receiving a *VA Form 21-22* from an IDES participant, see M21-1, Part III, Subpart i, 2.D.4.a * updating POA in electronic systems, see M21-1, Part III, Subpart ii, 3.C.5. |

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| e. What Constitutes a Complete VA Form 21-22 or VA Form 21-22a | Use the table below to determine whether the *VA Form 21-22* or *VA Form 21-22a* is complete. |

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| Form Type | Required Information |
| *VA Form 21-22* | In order for the *VA Form 21-22* to be considered complete, it must contain the following information:   * enough information to identify the Veteran/claimant * the name of the service organization * signature of the Veteran/claimant with a corresponding date of signature, and * signature of the representative acting on behalf of the service organization with a corresponding date of signature.   ***Exceptions***:   * ROs and PMCs are required to accept a *VA Form 21-22* with or without the VSO’s signature if received between September 30, 2012, and April 21, 2013. * Due to a technical issue, *VA Forms 21-22* submitted through SEP/VDC between March 22, 2015, and May 3, 2015, do not show an electronic signature from the Veteran. The forms without an electronic signature from this period remain valid for VA purposes.   ***Reference***: For more information on requirements for establishment of POA through VDC/SEP, see M21-1, Part III, Subpart i, 4.B.1.c. |
| *VA Form 21-22a* | In order for the *VA Form 21-22a* to be considered complete, it must contain the following information:   * enough information to identify the Veteran/claimant * the name of the individual appointed as the Veteran/claimant’s representative * identification of the type of representation * attorney * agent * individual providing representation under [38 14.630](http://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=611a37d408af1656f383f2b4aacf88bc&mc=true&r=SECTION&n=se38.1.14_1630) (claimant and representative signatures and the address of the representative must be provided), or * service organization representative * signature of the Veteran/claimant with a corresponding date of signature, and * signature of the individual providing representation on a one time basis, representative of an accredited VSO, agent, or attorney with a corresponding date of signature.   ***References***: For more information on   * representation by an individual to prepare, present, and prosecute one claim, see [38 CFR 14.630](http://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=611a37d408af1656f383f2b4aacf88bc&mc=true&r=SECTION&n=se38.1.14_1630), and * requirements regarding who can sign on behalf of an individual deemed incompetent, minor, or otherwise incapacitated person without a guardian, see [38 CFR 14.631(a)(iii)](http://www.ecfr.gov/cgi-bin/text-idx?SID=dc3aad9d85195a7da24697ad5670d136&mc=true&node=se38.1.14_1631&rgn=div8). |

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| ***Important***: There is no need to verify that the specific representative listed in Block 3B of *VA Form 21-22* is accredited. This form documents the appointment of the entire service organization listed in Block 3A and does not indicate the designation of only the specific representative to act on behalf of the organization.  ***References***: For more information on   * handling revoked or terminated representation, see M21-1, Part I, 3.A.6.d, and * signatures by an official representative of the VSO indicating acceptance of the claimant’s appointment, see [38 CFR 14.631](http://www.ecfr.gov/cgi-bin/text-idx?SID=d7aab84d4a1ec8c3e3e27b4919f1834e&mc=true&node=se38.1.14_1631&rgn=div8). |

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| **f. Requests to Revoke or Change POA** | When a request to revoke POA is received or a new POA is appointed   * update all systems as described in M21-1, Part III, Subpart ii, 3.C.5.a, and * notify the revoked representative.   Use the table below to notify a claimant’s revoked representative, when   * a new appointment form is received, or * a request for revocation of POA is received without a new appointment. |

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| **If revocation is being processed in a(n) ...** | **Then ...** |
| paper format | annotate the revoked form with the   * reason for revocation * date the revocation is processed, and * provide a copy of the annotated form to the representative. |
| electronic format | * add a permanent note in VBMS or MAP-D indicating the revocation of the appointment of representation * print out and annotate the appointment form with the * reason for revocation, and * date the revocation is processed, and * provide a copy of the annotated form to the representative.   ***Note***: In addition to the permanent note, the word *Revoked* must be added to the subject line of the POA appointment form in the eFolder, if available.  ***Reference***: For more information on changing the subject line of a document in an eFolder, see the [VBMS Job Aid – Editing Document Properties](http://vbaw.vba.va.gov/VBMS/Resources_Job_Aids.asp). |

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| ***References***: For more information on   * updating POA in electronic systems, see M21-1, Part III, Subpart ii, 3.C.5, and * handling revoked or terminated representation, see M21-1, Part I, 3.A.6.d. |

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| **g. Handling an Outdated VAForm 21-22 or VA Form 21-22a** | If a claimant submits an outdated version of *VA Form 21-22* or *VA Form 21-22a*, send a development letter requesting completion of the current version of the *VA Form 21-22* or *VA Form 21-22a*. With the letter     * provide the current version of the form for completion, and * return the outdated form.   ***Important***: If the form was received in the CM portal, print a copy of the form, take the appropriate action identified above, then upload the document to VBMS.  ***Reference***: For more information on handling outdated forms, see M21-1, Part III, Subpart ii, 1.C.7. |

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| **h. Handling an Incomplete VA Form 21-22 or VA Form 21-22a** | Use the procedure below if *VA Form 21-22* or *VA Form 21-22a* is incomplete. |

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| **If the VSO is ...** | **Then ...** |
| located in the same building as the RO | * forward the form to the VSO for completion, and * check all necessary incomplete items on the form. |
| * not located in the same building as the RO, and * there is an end product (EP) pending | * return the form to the claimant with a letter, and * check all necessary incomplete items on the form in red ink. |
| * not located in the same building as the RO, and * there is *no*EP pending | * establish an EP 400 *Correspondence* * return the form to the claimant with a letter * check all necessary incomplete items on the form in red ink, and * clear the EP 400. |

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| ***Important***: If the form was received in the CM portal, print a copy of the form, take the appropriate action identified in the table above, then upload the document to VBMS.  ***Note***: The VBMS development action *Form incomplete - Items checked in red needed*,” can be found under the category GENERAL.  ***Reference***: For more information on VBMS development actions, see the [*VBMS User Guide*](http://vbaw.vba.va.gov/VBMS/Resources_Technical_Information.asp). |

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| **i. Processing Copies of VA Form 21-22 or VA Form 21-22a With Paper Claims Folders** | The current versions of *VA Form 21-22* or *VA Form 21-22a* no longer have multiple copies to be acknowledged and sent to the POA or representative.  To process these forms with *paper claims folders* use the below table. |

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| **If the form is a …** | **Then ...** |
| paper *VA Form 21-22* | * enter in the *Acknowledged* block * the current date * your initials, and * as applicable, complete the *Sent to* block. |
| paper *VA Form 21-22a* | annotate with   * the current date, and * *Acknowledged*. |
| an electronic *VA Form 21-22* or *VA Form 21-22a* | * upload to VBMS.   ***Note***: Users may view the form electronically in VBMS. |
| paper original of either *VA Form 21-22* or *VA Form 21-22a* | reverse file the form on the right flap of the claims folder. |

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| **j. Processing Copies of VA Form 21-22 or VA Form 21-22a With eFolders** | The current versions of *VA Form 21-22* or *VA Form 21-22a* no longer have multiple copies to be acknowledged and sent to the POA or representative.  To process these forms with *eFolders*, upload the form the CM portal to VBMS.  ***Notes***:   * The claims folder copy is shown in VBMS or Virtual VA. * The service organization is able to view the eFolder for Veterans or claimants they represent. * If a paper folder exists for Vocational Rehabilitation and Education (VR&E), Education, Insurance, or Loan Guaranty, those business lines have access to VBMS and are able to print the form. |

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| **k. Unclear Declaration** | If a private attorney’s declaration of representation is unclear whether it is limited to a certain claim/appeal or unlimited, write to the attorney and ask for clarification. Reverse-file any such clarification in the claims folder, or upload to the eFolder, whichever is applicable. |

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| **l. Handling Appointment Forms/Letters When There Is No Record of a Claims Folder** | Use the table below to handle the receipt of *VA Form 21-22*, *VA Form 21-22a*, or the appointment letter when there is no record of a claims folder or a pending claim. |

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| **If …** | **Then …** |
| the form/letter indicates a claim for disability insurance only | forward the form/letter to the appropriate insurance center. |
| there is no record of a claim for disability insurance | return the form/letter to the VSO, agent, non-licensed individual, or attorney with an explanation for the return.  ***Important***: Before returning the document, check the BIRLS LOC screen for the existence of a Chapter 30 or notice of death (NOD) folder since the appointment could relate to a Chapter 30 claim or survivors benefit claim. |

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| ***Note***: If the form was received in the CM portal, print a copy of the form, take the appropriate action identified in the table above, then upload the document to VBMS. |

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| **m. Validating Claims Without Appointment Forms/Letters** | Some cases require validation of an informal claim filed by an accredited representative of a VSO, agent, non-licensed individual, or attorney before the necessary *VA Form 21-22*, *VA Form 21-22a*, or appointment letter is received.  In the absence of evidence to the contrary, presume the existence of a valid appointment in favor of the accredited representative or a VSO, agent, non-licensed individual, or attorney intending to file a claim as of the date the claim was received.  ***References***: For information on   * applications for disability compensation and/or pension, see M21-1, Part III, Subpart ii, 2.B.1, and * informal claims and intent to file (ITF), see M21-1, Part III, Subpart ii, 2.C.1. |

**5. Updating Electronic Systems for POA**

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| **Introduction** | This topic contains information on updating electronic systems for POA, including   * required system updates for changes in POA appointments * updating the POA in Share * handling preexisting representative relationships, and * updating electronic systems to reflect POA access to the eFolder. |

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| **Change Date** | March 17, 2016 |

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| **a. Required System Updates for Changes in POA Appointments** | When a claimant appoints a new representative or revokes a current representative the following system updates are required:   * Share * update the Beneficiary Identification and Records Locator Subsystem (BIRLS) * perform a pending issue file (PIF) update to provide POA * access to the eFolder, and * change of address authority. * Veterans Appeals Control and Locator System (VACOLS) (if there is an active appeal pending at the RO).   ***Note***: If the only update needed is POA access to the eFolder, this can be performed through VBMS, as described in M21-1, Part III, Subpart ii, 3.C.5.d.  ***References***: For more information on   * updating POA in VACOLS, see the [*VACOLS User Guide*](http://vbaw.vba.va.gov/bl/21/publicat/Users/Index.htm#bmv), and * providing POA access to the eFolder, see M21-1, Part III, Subpart ii, 3.C.5.d. |

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| **b. Updating the POA in Share** | Once current and complete *VA Form 21-22* or *VA Form 21-22a* has been received, follow the steps in the table below to update Share for the appointment of a representative. |

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| **Step** | **Action** |
| 1 | Open Share. |
| 2 | To verify that the POA has not already been updated   * select the BIRLS INQUIRY command * enter the claimant’s claims folder number in the FILE NUMBER OR SSN field, and * select SUBMIT. |
| 3 | Review the POWER OF ATTORNEY field.  Does the POA need to be updated?   * If *yes*, go to the next step. * If *no*, go to Step 7. |
| 4 | To update the BIRLS record in Share   * select the BIRLS UPDATE command * enter the claimant’s first and last name, and * select SUBMIT. |
| 5 | Under the POWER OF ATTORNEY SEARCH command, use the LOCATE field to look up the POA.  Was the POA found using the LOCATE field?   * If *yes*, select UPDATE and go to Step 7. * If *no*, go to the next step. |
| 6 | Perform an accreditation of VSOs search using the [Office of General Counsel (OGC) Accreditation Search](http://www.va.gov/ogc/apps/accreditation/index.asp).  Was the POA found in the [OGC Accreditation Search](http://www.va.gov/ogc/apps/accreditation/index.asp)?   * If *yes*, * follow the procedure in M21-1, Part III, Subpart ii, 3.C.6 to have the POA added to the corporate database * add a note to VBMS or MAP-D * select the POWER OF ATTORNEY SEARCH command * use the code 099 as the POA in the LOCATE field * select UPDATE, and * go to the next step. * If *no*, * add a note to VBMS or MAP-D explaining why the POA could not be updated, and * forward the information to the Agent and Attorney Fee Coordinator (AAFC) for follow up with the POA.   ***Reference***: For more information on AAFC’s responsibilities in handling non-accredited POA submissions, see   * M21-1, Part I, 3.C.1.d * M21-1, Part I, 3.C.6, and * M21-1, Part I, 3.C.7. |
| 7 | Follow the steps in the table below to perform the required changes through a PIF update.   |  |  | | --- | --- | | **Step** | **Action** | | 1 | * Select the PIF INQUIRY command. * Is there an EP pending? * If *yes*, * make note of the specific EP and claim label * select READY, and * continue to the next step. * If *no*, * begin establishment of an EP 400 *Correspondence* in Share in accordance with M21-1, Part III, Subpart ii, 3.D.2.e * on the 101 PENDING ISSUE/CORPORATE CONTROL ESTABLISHMENT screen * follow the instructions in M21-1, Part III, Subpart ii, 3.C.5.d for providing POA access to the eFolder in Share, if applicable, and * if Block 14 on *VA Form 21-22* or Block 11 on *VA Form 21-22a* is checked, click on the CADD AUTH’D radio button * select CREATE ESTABLISHMENT * select *Yes* when prompted *Do you wish to automatically clear this end product now?*, and * proceed no further. | | 2 | Select the PIF CHANGE command and enter the   * BENEFIT TYPE (CPL, etc.) * PAYEE NUMBER (00 for a Veteran, etc.), and * CLAIM TYPE (020, etc.) | | 4 | If required, update the POA using the POWER OF ATTORNEY SEARCH command (the BIRLS UPDATE should have updated POA) | | 5 | Follow the instructions in M21-1, Part III, Subpart ii, 3.C.5.d for providing POA access to the eFolder in Share, if applicable. | | 6 | If Block 14 on *VA Form 21-22* or Block 11 on *VA Form 21-22a* is checked, click on the CADD AUTH’D radio button. | | 7 | Select UPDATE. | |

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| ***References***: For more information on   * POA codes, see M21-1, Part III, Subpart ii, 3.C.6 * accreditation of VSOs, go to [OGC Accreditation Search](http://www.va.gov/ogc/apps/accreditation/index.asp), and * updating POA in Share, see the [*Share User Guide*](http://css.vba.va.gov/SHARE/). |

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| **c. Handling Preexisting Representative Relationships** | If an attorney files a limited declaration of representation with respect to a particular claim or claims, it is possible that a preexisting representative relationship with a VSO, agent, or other licensed attorney remains in effect with respect to all other claims.  However, even if the attorney’s limited declaration of representation does not completely revoke all preexisting representative relationships, change the POA code to 099.  ***Notes***:   * If the claimant was previously represented by a VSO, changing POA code to 099 blocks the VSO’s access to corporate records concerning the claimant. Therefore, access to the claimant’s record under the preexisting representative relationship will be limited to a review of the claims folder. * Update VBMS to reflect the limited representation by adding a VBMS note listing the particular claim or claims that the attorney indicates in his or her declaration of representation. |

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| **d. Updating Electronic Systems to Reflect POA Access to the eFolder** | If a claimant has authorized disclosure to an appointed representative of records protected by [38 U.S.C. 7332](http://www.law.cornell.edu/uscode/html/uscode38/usc_sec_38_00007332----000-.html) (relating to drug abuse, alcoholism or alcohol abuse, or infection with human immunodeficiency virus (HIV) or sickle cell anemia) without limitation, then update Share or VBMS to provide the POA access to the eFolder.  ***Important***: Authorization to sensitive records is granted by the claimant checking either Box 12 on *VA Form 21-22* or Box 9 on *VA Form 21-22a*.  Use the table below to determine how to update electronic systems to reflect POA access to sensitive information. |

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| **If the claimant …** | **And …** | **Then …** |
| *authorizes* a representative’s access with no limitations to records protected by [38 U.S.C. 7332](http://www.law.cornell.edu/uscode/html/uscode38/usc_sec_38_00007332----000-.html) | Share will be used to update VA’s computer systems | select *Yes* from the drop-down box in the AUTH’D POA ACCESS field on the 101 PENDING ISSUE/CORPORATE CONTROL ESTABLISHMENT screen. |
| VBMS will be used to update VA’s computer systems | * click on the VETERAN down arrow on the VETERAN PROFILE screen * select *POA*, and * place a check mark in the ALLOW POA ACCESS TO DOCUMENTS box. |
| *indicates any limitation to or does not authorize* a representative’s access to records protected by [38 U.S.C. 7332](http://www.law.cornell.edu/uscode/html/uscode38/usc_sec_38_00007332----000-.html) | Share will be used to update VA’s computer systems | select *No* from the drop-down box in the AUTH’D POA ACCESS field on the 101 PENDING ISSUE/CORPORATE CONTROL ESTABLISHMENT screen. |
| VBMS will be used to update VA’s computer systems | * click on the VETERAN down arrow on the VETERAN PROFILE screen * select *POA*, and * ensure the ALLOW POA ACCESS TO DOCUMENTS box is blank. |

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| ***Important***: A PIF CHANGE is necessary to update disclosure of records when   * there is a pending claim, and * representation is changed via BIRLS.   ***Note***: Details regarding POA access are viewable on the Share   * ALL RELATIONSHIP tab of CORPORATE INQUIRY, and * GENERAL INFORMATION screen under AWARDS/RATINGS.   ***References***: For more information on   * executing a PIF CHANGE to update POA, see Step 7 of M21-1, Part III, Subpart ii, 3.C.5.b * claims establishment, see M21-1, Part III, Subpart ii, 3.D.2, and * records protected by [38 U.S.C. 7332](http://www.law.cornell.edu/uscode/html/uscode38/usc_sec_38_00007332----000-.html), see M21-1, Part I, 3.B.2. |

**6. POA Codes**

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| **Introduction** | This topic contains information on the POA codes, including   * notes on POA codes * adding POA codes to corporate * National organization POA codes listed alphabetically * National organization POA codes listed numerically * State organization POA codes listed alphabetically, and * State organization POA codes listed numerically. |

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| **Change Date** | July 11, 2015 |

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| **a. Notes on POA Codes** | * POA codes are shown by the corporate record as either alphanumeric codes or by the name of the organization. BIRLS shows the codes prefixed by a zero. * State VSO codes are based on the last two digits of the RO number. Only one number is used when there is more than one RO to a state. * States not listed have no recognized VSO. * Private attorneys or agents submitting requests to represent a VA claimant must be verified as accredited by OGC, per [38 CFR 14.629](http://www.ecfr.gov/cgi-bin/text-idx?SID=19a3ecff35226a4542cabd21c14807ec&mc=true&node=se38.1.14_1629&rgn=div8).   ***Reference***: For a list of accredited VSOs, attorneys, and agents, see the [OGC Accreditation Search](http://www.va.gov/ogc/apps/accreditation/index.asp). |

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| **b. Adding POA Codes to Corporate** | When a POA is not located in corporate but is found in the [OGC Accreditation Search](http://www.va.gov/ogc/apps/accreditation/index.asp), follow the procedures in the table below to have the POA added to corporate. |

|  |  |
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| **Stage** | **Description** |
| 1 | To initiate adding a VSO to the corporate database, contact the Information Security Officer (ISO) assigned to the local RO and provide the   * POA code * name of agent, attorney, or representative * role, such as * claims agent * an attorney, or * VSO representative, and * POA’s contact information (address, phone, fax, and e-mail).   ***Note***: The local ISO contacts the Network Information Security Officer to update the POA in the corporate database. |
| 2 | Update the claimant’s profile to include POA code 099 as a placeholder until the corporate database is updated.  ***Note***: Once the POA code is updated in the corporate database, the ISO contacts the local AAFC to properly update the code in all VBA systems.  ***Reference***: For more information on updating POA in Share, see M21-1, Part III, Subpart ii, 3.C.5.b. |
| 4 | Upon notification of a newly established POA code, the AAFC will   * contact the individual attorney or agent to identify any other Veterans or claimants they represent * verify the validity of the other clients *VA Form 21-22a*, and * update all records as necessary.   ***Note***: Historically, these individuals may have been assigned a 099 (no exclusive contact) or 066 (exclusive contact) code and will not automatically be displayed for the specific attorney in Share, VBMS, or SEP. |

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| **c. National Organization POA Codes Listed Alphabetically** | The table below lists the POA codes for National VSOs alphabetically. |

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| --- | --- |
| **National Organization Name** | **POA Code** |
| African American PTSD Association | 091 |
| American Ex-Prisoners of War, Inc. | 065 |
| American GI Forum, National Veterans Outreach Program | 068 |
| American Legion | 074 |
| American Red Cross | 075 |
| American Veterans/AMVETS | 077 |
| Armed Forces Services Corporation | 078 |
| Army and Navy Union, USA | 079 |
| Associates of Vietnam Veterans of America | 011 |
| Blinded Veterans Association | 080 |
| Catholic War Veterans of the U.S.A. | 081 |
| Disabled American Veterans | 083 |
| Fleet Reserve Association | 085 |
| Gold Star Wives of America, Inc. | 012 |
| Italian American War Veterans of the United States, Inc. | 095 |
| Jewish War Veterans of the United States | 086 |
| Legion of Valor of the United States of America, Inc. | 087 |
| Marine Corps League | 088 |
| Military Officers Association of America | A21 |
| Military Order of the Purple Heart | 089 |
| National Amputation Foundation, Inc. | 024 |
| National Association for Black Veterans, Inc. | 084 |
| National Association of County Veterans Service Officers | 064 |
| National Veterans Legal Services Program | 082 |
| National Veterans Organization of America | 094 |
| Navy Mutual Aid Association | 093 |
| Non Commissioned Officers Association of the U.S.A. | 062 |
| Paralyzed Veterans of America, Inc. | 071 |
| Polish Legion of American Veterans, U.S.A. | 003 |
| Swords to Plowshares, Veterans Rights Organization, Inc. | 043 |
| The Retired Enlisted Association | 007 |
| The Veterans Assistance Foundation, Inc. | 063 |
| The Veterans of the Vietnam War, Inc. & The Veterans Coalition | 092 |
| United Spanish War Veterans of the United States | 096 |
| United Spinal Association, Inc. | 090 |
| Veterans of Foreign Wars of the United States | 097 |
| Veterans of World War I of the U.S.A., Inc. | 098 |
| Vietnam Era Veterans Association | 029 |
| Vietnam Veterans of America | 070 |
| The Wounded Warrior Project | 00V |

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| **d. National Organization POA Codes Listed Numerically** | The table below lists the POA codes for National organizations numerically. |

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| --- | --- |
| **POA Code** | **National Organization Name** |
| A21 | Military Officers Association of America |
| 00V | The Wounded Warrior Project |
| 007 | The Retired Enlisted Association |
| 011 | Associates of Vietnam Veterans of America |
| 012 | Gold Star Wives of America, Inc. |
| 024 | National Amputation Foundation, Inc. |
| 029 | Vietnam Era Veterans Association |
| 043 | Swords to Plowshares, Veterans Rights Organization, Inc. |
| 062 | Non-commissioned Officers Association of the U.S.A. |
| 064 | National Association of County Veterans Service Officers |
| 065 | American Ex-Prisoners of War, Inc. |
| 068 | American GI Forum, National Veterans Outreach Program |
| 070 | Vietnam Veterans of America |
| 071 | Paralyzed Veterans of America, Inc. |
| 074 | American Legion |
| 075 | American Red Cross |
| 077 | American Veterans/AMVETS |
| 078 | Armed Forces Services Corporation |
| 079 | Army and Navy Union, USA |
| 080 | Blinded Veterans Association |
| 081 | Catholic War Veterans of the U.S.A. |
| 082 | National Veterans Legal Services Program |
| 083 | Disabled American Veterans |
| 084 | National Association for Black Veterans, Inc. |
| 085 | Fleet Reserve Association |
| 086 | Jewish War Veterans of the United States |
| 087 | Legion of Valor of the United States of America, Inc. |
| 088 | Marine Corps League |
| 089 | Military Order of the Purple Heart |
| 090 | United Spinal Association, Inc. |
| 091 | African American PTSD Association |
| 092 | The Veterans of the Vietnam War, Inc. & The Veterans Coalition |
| 093 | Navy Mutual Aid Association |
| 094 | National Veterans Organization of America |
| 095 | Italian American War Veterans of the United States, Inc. |
| 096 | United Spanish War Veterans of the United States |
| 097 | Veterans of Foreign Wars of the United States |
| 098 | Veterans of World War I of the U.S.A., Inc. |

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| **e. State Organization POA Codes Listed Alphabetically** | The table below lists the POA codes for State organizations alphabetically by State. |

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| --- | --- | --- |
| **State** | **State Organization Name** | **POA Code** |
| Alabama | Department of Veterans Affairs | 022 |
| American Samoa | Veterans Affairs Office | 067 |
| Arizona | Veterans Service Commission | 045 |
| Arkansas | Department of Veterans Affairs | 050 |
| California | Department of Veterans Affairs | 044 |
| Colorado | Division of Veterans Affairs | 039 |
| Connecticut | Department of Veterans' Affairs | 008 |
| Delaware | Commission of Veterans Affairs | 060 |
| Florida | Department of Veterans Affairs | 017 |
| Georgia | Department of Veterans Service | 016 |
| Guam | Office of Veterans Affairs | 056 |
| Hawaii | Office of Veterans Services | 059 |
| Idaho | Division of Veterans Services | 047 |
| Illinois | Department of Veterans Affairs | 028 |
| Iowa | Department of Veterans Affairs | 033 |
| Kansas | Commission on Veterans Affairs | 052 |
| Kentucky | Center for Veterans Affairs | 027 |
| Louisiana | Department of Veterans' Affairs | 021 |
| Maine | Department of Veterans Services | 002 |
| Maryland | Veterans' Service Commission | 013 |
| Massachusetts | Department of Veterans Service | 001 |
| Michigan | Michigan Veterans Affairs Agency | 8FE |
| Minnesota | Department of Veterans Affairs | 035 |
| Mississippi | Veterans Affairs Board | 023 |
| Missouri | Veterans Commission | 031 |
| Montana | Veterans Affairs Division | 036 |
| Nebraska | Department of Veterans' Affairs | 034 |
| Nevada | Commission for Veterans Affairs | 054 |
| New Hampshire | State Veterans Council | 073 |
| New Jersey | Department of Military and Veterans' Affairs | 009 |
| New Mexico | Veterans' Service Commission | 040 |
| New York | Division of Veterans' Affairs | 006 |
| Northern Mariana Islands | Veterans Affairs Office | 053 |
| North Carolina | Division of Veterans Affairs | 018 |
| North Dakota | Department of Veterans Affairs | 037 |
| Ohio | Department of Veterans Services | 025 |
| Oklahoma | Department of Veterans Affairs | 051 |
| Oregon | Department of Veterans' Affairs | 048 |
| Pennsylvania | Department of Military Affairs Bureau for Veterans Affairs | 010 |
| Puerto Rico | Public Advocate for Veterans Affairs | 055 |
| Rhode Island | Division of Veterans Affairs | 004 |
| South Carolina | Division of Veterans Affairs | 019 |
| South Dakota | Division of Veterans Affairs | 038 |
| Tennessee | Department of Veterans' Affairs | 020 |
| Texas | Veterans Commission | 049 |
| Utah | Office of Veterans Affairs | 041 |
| Vermont | Veterans Affairs Section, Military Department | 005 |
| Virgin Islands | Office of Veterans Affairs | 032 |
| Virginia | Department of Veterans Affairs | 014 |
| Washington | Department of Veterans Affairs | 046 |
| West Virginia | Department of Veterans Assistance | 015 |
| Wisconsin | Department of Veterans Affairs | 030 |
| Wyoming | Wyoming Veterans Affairs Commission | 869 |

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| **f. State Organization POA Codes Listed Numerically** | The table below lists the POA codes for State organizations numerically. |

|  |  |  |
| --- | --- | --- |
| **POA Code** | **State** | **State Organization Name** |
| 001 | Massachusetts | Department of Veterans Service |
| 002 | Maine | Department of Veterans Services |
| 004 | Rhode Island | Division of Veterans Affairs |
| 005 | Vermont | Veterans Affairs Section, Military Department |
| 006 | New York | Division of Veterans' Affairs |
| 008 | Connecticut | Department of Veterans' Affairs |
| 009 | New Jersey | Department of Military and Veterans' Affairs |
| 010 | Pennsylvania | Department of Military Affairs Bureau for Veterans Affairs |
| 013 | Maryland | Veterans' Service Commission |
| 014 | Virginia | Department of Veterans Affairs |
| 015 | West Virginia | Department of Veterans Assistance |
| 016 | Georgia | Department of Veterans Service |
| 017 | Florida | Department of Veterans Affairs |
| 018 | North Carolina | Division of Veterans Affairs |
| 019 | South Carolina | Division of Veterans Affairs |
| 020 | Tennessee | Department of Veterans' Affairs |
| 021 | Louisiana | Department of Veterans' Affairs |
| 022 | Alabama | Department of Veterans Affairs |
| 023 | Mississippi | Veterans Affairs Board |
| 025 | Ohio | Department of Veterans Services |
| 027 | Kentucky | Center for Veterans Affairs |
| 028 | Illinois | Department of Veterans Affairs |
| 030 | Wisconsin | Department of Veterans Affairs |
| 031 | Missouri | Veterans Commission |
| 032 | Virgin Islands | Office of Veterans Affairs |
| 033 | Iowa | Department of Veterans Affairs |
| 034 | Nebraska | Department of Veterans' Affairs |
| 035 | Minnesota | Department of Veterans Affairs |
| 036 | Montana | Veterans Affairs Division |
| 037 | North Dakota | Department of Veterans Affairs |
| 038 | South Dakota | Division of Veterans Affairs |
| 039 | Colorado | Division of Veterans Affairs |
| 040 | New Mexico | Veterans' Service Commission |
| 041 | Utah | Office of Veterans Affairs |
| 044 | California | Department of Veterans Affairs |
| 045 | Arizona | Veterans Service Commission |
| 046 | Washington | Department of Veterans Affairs |
| 047 | Idaho | Division of Veterans Services |
| 048 | Oregon | Department of Veterans' Affairs |
| 049 | Texas | Veterans Commission |
| 050 | Arkansas | Department of Veterans Affairs |
| 051 | Oklahoma | Department of Veterans Affairs |
| 052 | Kansas | Commission on Veterans Affairs |
| 053 | Northern Mariana Islands | Veterans Affairs Office |
| 054 | Nevada | Commission for Veterans Affairs |
| 055 | Puerto Rico | Public Advocate for Veterans Affairs |
| 056 | Guam | Office of Veterans Affairs |
| 059 | Hawaii | Office of Veterans Services |
| 060 | Delaware | Commission of Veterans Affairs |
| 067 | American Samoa | Veterans Affairs Office |
| 073 | New Hampshire | State Veterans Council |
| 869 | Wyoming | Wyoming Veterans Commission |
| 8FE | Michigan | Michigan Veterans Affairs Agency |

#### 7. Updating Military Service Information

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| **Introduction** | This topic contains information on updating military service information, including   * military service verification * information required to verify military service * updating multiple periods of active military service, and * active military service by reason of award of service connection (SC). |

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| **Change Date** | February 11, 2016 |

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| a. Military Service Verification | All periods of active duty and periods of service reported by the Veteran as related to claimed issues must be verified and updated in the systems. ROs are responsible for ensuring service is updated in both BIRLS and the Veteran’s corporate record through Participant Profile.  **References**: For more information on   * duty periods, see [38 CFR 3.6](http://www.ecfr.gov/cgi-bin/text-idx?SID=5dea2e5ae38d4f4810bf7ca791a5efee&node=se38.1.3_16&rgn=div8) * information required to verify military service, see M21-1, Part III, Subpart ii, 3.C.7.b * updating multiple periods of active military service, see M21-1, Part III, Subpart ii, 3.C.7.c, and * active military service by reason of award of service connection (SC), see M21-1, Part III, Subpart ii, 3.C.7.d. |

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| **b. Information Required to Verify Military Service** | To properly verify active military service, the following information must be available   * entered on date (EOD) * date of release from active duty (RAD) * branch of service * character of service, and * separation reason.   ***Note***: Once all information necessary to verify service is obtained, users should indicate that service is verified by   * entering *Y* in the VERIFIED field, if using BIRLS, or * checking the SERVICE VERIFIED box in Participant Profile.   ***References***: For more information on   * verifying military service in * BIRLS, see the [*Share User’s Guide*](http://css.vba.va.gov/SHARE/), and * Participant Profile, see the [*Participant Profile User’s Guide*](http://vbaw.vba.va.gov/VetsNet/SPP_Docs/Webhelp/Participant_Profile.htm), and * updating multiple periods of active duty military service, see M21-1, Part III, Subpart ii, 3.C.7.c. |

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| **c. Updating Multiple Periods of Active Military Service** | Use the table below to determine which system(s) to use when updating multiple periods of active military service. |

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| **If the Veteran has…** | **Then ...** |
| up to three periods of active military service | enter all periods of active military service in BIRLS. |
| more than three periods of active military service | * enter the first three periods of active military service in BIRLS, and * enter any remaining periods of active military service in Participant Profile. |

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| ***Important***: Service information entered into Participant Profile will only update the Veteran’s corporate record. Changes made in Participant Profile ***will not*** automatically update the information shown in BIRLS. Users should check both systems to ensure the Veteran’s military service is complete.  ***Reference***: For more information on updating military service in   * BIRLS, see the [*Share User’s Guide*](http://css.vba.va.gov/SHARE/), and * Participant Profile, see the [*Participant Profile User’s Guide*](http://vbaw.vba.va.gov/VetsNet/SPP_Docs/Webhelp/Participant_Profile.htm). |

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| **d. Active Military Service by Reason of Award of SC** | In some situations, SC is awarded for a death, disease, or injury incurred or aggravated during a period of duty other than full-time active duty in the Armed Forces. In these situations, the period of duty during which the death, disease, or injury occurred is considered active military service for VA compensation purposes.  ***Example***: SC may be awarded for an injury incurred in the line of duty (LOD) during inactive duty for training. Once it is determined that SC is in order for that injury, the period of inactive duty for training is considered active military service for VA compensation purposes.  ***Important***: All periods of active military service ***must*** be updated and verified in the systems by the rating activity prior to completion of the rating decision. Failure to do so will result in inaccurate or incomplete service displayed on the rating decision *Codesheet*.  ***References***: For more information on   * duty periods, see * [38 CFR 3.6](http://www.ecfr.gov/cgi-bin/text-idx?SID=e19558d63ae0d9e48947a6cd0b87bce5&mc=true&node=se38.1.3_16&rgn=div8), and * [38 U.S.C. 101(24)](https://www.law.cornell.edu/uscode/text/38/101) * the information required to verify military service, see M21-1, Part III, Subpart ii, 3.C.7.b * updating multiple periods of active military service, see M21-1, Part III, Subpart ii, 3.C.7.c, and * updating military service in * BIRLS, see the [*Share User’s Guide*](http://css.vba.va.gov/SHARE/), and * Participant Profile, see the [*Participant Profile User’s Guide*](http://vbaw.vba.va.gov/VetsNet/SPP_Docs/Webhelp/Participant_Profile.htm). |