

VSO On-boarding Read Me First

The intent of this document is to provide Veteran Service Organizations (VSOs) a guide to using the on-boarding documentation on the VACI website as the VSO on-boards into VA's D2D Services.

VSO PRE-ONBOARDING REQUIREMENTS:

1. VA Office of General Counsel (OGC) or Power-of-Attorney (POA) self-accreditation to submit claims into VA, or a POA partner relationship who will submit the VSO's claims into VA.
2. A Claims Management System (CMS), either in-house or through a third-party vendor. A CMS provider list is provided under On-boarding Documents.

Ordering	Document Title	Purpose	Context	Questions /Return Document to
1	CMS Provider List	The purpose of this document is to provide VSOs a list of D2D CMS providers, and their point-of-contacts and D2D certification status.	This document should be used by VSOs who do not have a CMS.	N/A
2	Memorandum of Understanding (MOU)	The MOU documents the terms and conditions for sharing data and information resources in a secure manner, defines the purpose of the interconnection, identifies relative authorities, and specifies the responsibilities of the participating organizations.	<p>The MOU is required to be completed by the VSO who has met the pre-onboarding requirements stated above.</p> <p>The MOU must be completed for each POA relationship. The VSO Organization Name in the document reflects the VSO's POA relationship. For example, if a State VSO has and will use their American Legion State POA or OGC number for submitting claims, the VSO Organization Name will be American Legion-Department of [State]. Exceptions to this policy occur when the POA has an existing MOU with D2D. Please pre-verify that your POA has an existing MOU with D2D prior to</p>	D2Dmailbox: D2D.VBA@va.gov

			submitting claims into D2D under that POA.	
3	Data Transfer Agreement (DTA)	The DTA's purpose is to establish the terms and conditions under which the VSO Organization will electronically submit claim data captured in its claims management system to VBA's Data Access Services (DAS), for the express use and under the express authority as set forth pursuant to the Memorandum of Understanding (MOU).	<p>The DTA is required to be completed by the VSO who has met the pre- onboarding requirements stated above.</p> <p>The DTA is required to be completed by the VSO, not the CMS provider, when the CMS Provider is a separate organization from the VSO.</p> <p>The DTA must be completed for each POA relationship. The VSO Organization Name in the document must reflect the VSO's POA relationship; if applicable, check with the POA to determine the correct VSO Organization Name. Exceptions to this policy occur when the POA has an existing DTA with D2D. Please pre-verify that your POA has an existing DTA with D2D prior to submitting claims into D2D under that POA.</p>	D2D mailbox D2D.VBA@va.gov
4	Customer Intake Survey (CIS)	The CIS's purpose is to provide D2D with VSO contact information, established CMS and POA relationships, the VSO's claim submission process, and the VSO's processing history and projections.	The CIS is required to be completed by the VSO.	D2D mailbox D2D.VBA@va.gov
5	D2D VSO On-boarding Checklist	The D2D VSO On-boarding Checklist enables the VSO to self-monitor its on-boarding into the D2D system.	D2D Business Team will provide a customized checklist to the VSO that reflects the VSO's configuration.	N/A

6	D2D Fact Sheet	The D2D Fact Sheet provides the on-boarded VSO information on D2D resources, services, and points-of-contact.	D2D Business Team will provide the D2D Fact Sheet to the VSO for ongoing use.	N/A
7	D2D VSO User Guide	The D2D VSO User Guide provides business processes for submitting claims.		N/A