

Supplemental Development Checklist

Completing this checklist will create efficiencies that prevent thousands of deferrals. See Deferral Checklist Job Aid for additional information.

Instructions to complete development checklist

- A. Upload the checklist into VBMS document file upon initial development. One checklist will be used throughout the life of the claim. The development activity will be able to see exactly what stage the claim is in and what has been done.
- B. If the checklist is already uploaded into VBMS, download it to your desktop by selecting download tool on right side of VBMS document screen.
- C. Initial the tasks which have been completed by clicking on the fill and sign icon on the right side of downloaded form.
- D. Save the document back into the VBMS Documents. Do not upload another version. Use the same name and overwrite previous version.
- E. VSR requesting documents should initial "Requestor" section. VSR making claim RFD should initial "Verified" section.
- F. Do not download to your computer until you are ready to complete. Once downloaded to your computer it must be uploaded with changes within one hour.

Development Activity	Requestor Initials	Verifier Initials
Is application complete and verified (Name, Contentions, Service, Signature, Benefit)? M21-1 III.ii.2.B.2.a		
Is 5103 required? If yes, is notice of record in the VBMS efile? M21-1 I.1.B.1.a		
Is Service verified and updated in VBMS? M21-1 III.ii.6.B and M21-1 III.ii.3.C		
Is date of claim, EP and claim label correct? M21-1 III.ii.2.B.2.c and M21-4 Appendix B.		
Is/are contention/s accurate (classification, date, type, special issues)? M21-1 III.iii.1.F.2 and M21-4. Appendix C.3		
Are non-Federal records development required (DOMA, 4142)? M21-1 I.1.C.2		
Are Federal records development required (STRs, Personnel, VAMC. MTF)? M21-1 I.1.C.1.b		
Is special issue development required? M21-1 I.1.B.1.f		
If IU claim is development required (SSA, 4192, 8940, Voc Rahab)? M21-1 IV.ii.2.F.2		
Is/are tracked items correct/updated (Secondary action required (to prevent auto RFD exam note) M21-1 III.iii.1.F.3		
Exam Request Decision Justification		
Element One: Current disability, diagnosis or symptoms M21-1 I.1.C.3.d		
Element Two: Event, injury, disease in service or presumptive M21-1 I.1.C.3.e		
Element Three: A link between element one and element two. M21-1 I.1.C.3.f		
If an element is not met, explain why (exam is warranted if all elements are met):		
Is a medical opinion necessary/requested for non-complex exam? M21-1 III.iv.3.A.7.a		
Complete this section when an exam is scheduled		
Verify Veteran's name, phone #, address (address may be temporary)		
Verify ERRA document is in the Veteran's file		
Verify exam language in CAPRI or VBMS to include ACE where necessary		
Verify all contentions warranting an exam are on the exam request		
Verify contention classification and DBQ are correct		
Verify medical opinion verbiage is clear and concise and DBQ when exam submitted via VBMS/EMS		
Verify pertinent evidence is bookmarked, tabbed and labeled M21-1 III.iv.3.A.8.d		
Exceptions to ACE exams: EM records are not available, Separation Health Assessments in support of IDES and BDD claims, GEN MED, TBI, Mental Health M21-1 III.iv.3.A.4.b		