**VRE-NCT-01-Pre-Evaluation Activities: Script**

Slide 1:

Welcome to VR&E Pre-Evaluation Activities training. This training aims to equip VR&E staff with knowledge of outreach activities provided to claimants. In addition, this training will review how to process initial applications and outline the steps to take to determine eligibility, including scheduling claimants for orientation/initial evaluation.

Slide 2:

Upon completion of Pre-Evaluation Activities training, you will be able to:

* Conduct outreach activities
* Identify eligibility requirements for VR&E services
* Determine if the claimant meets basic eligibility criteria
* Process an application
* Schedule the individual for orientation/initial evaluation

Slide 3:

The purpose of pre-evaluation activities is twofold:

* To conduct outreach (e.g., contacting the claimant to advise him/her of VR&E benefits available).
* Secondly, to determine if the claimant is eligible for VR&E benefits.

Based on the outcome of the pre-evaluation activities, qualified individuals who have been discharged and/or are awaiting medical discharge from active military duty will receive necessary services to assist them in preparing for, finding, and maintaining suitable employment or achieving independence in their daily living.

Depending on the size of the Regional Office (RO), Vocational Rehabilitation Counselors (VRCs), VetSucess on Campus (VSOC) counselors and Integrated Disability Evaluation System (IDES) counselors may perform many of these activities. Once these activities are complete, the claimant is ready to be scheduled for an initial orientation/evaluation.

Keep in mind that although most of these activities are performed by VR&E Officers or program support assistants, VRCs are still required to know the details involved in performing these activities.

Slide 4:

VR&E outreach activities are designed to ensure all Veterans and Service members are made aware of the VR&E program and services. The goal is to educate claimants so that they have sufficient understanding to make an informed choice when applying for services.

The VR&E program uses several different methods to reach out to individuals. These methods include, but are not limited to:

* Partnerships with several Veteran Service Organizations (VSOs) that help claimants complete benefit forms, as well as educate them about available benefits.
* Programs: VR&E has developed special programs to help individuals transition into Chapter 31 services. These programs include:
	+ Military transition assistance program (TAP): When separating from service, individuals are briefed on VR&E services. TAPs is a comprehensive workshop at military installations established to meet the needs of a separating Service member during their period of transition into civilian life by offering job-search assistance and related services.
	+ VetSuccess on Campus (VSOC): VSOC VRCs are assigned to certain campuses throughout the United States and are easily accessible by Veteran students. VSOC VRCs are available to respond to quick questions or detailed requests for assistance accessing VA benefits such as life insurance, home loans, VR&E, Post-9/11 GI Bill or other VA education benefits. VSOC VRCs also provide referrals to VA medical facilities and local Veterans centers and information on local community and campus resources as well as employment and resume assistance.
	+ Integrated Disability Evaluation System (IDES) : IDES VRCs are placed on military installations and engage Service members early in their recovery, helping them identify the skills they have, the skills they need and opportunities where those skills can be used for future employment.
* Public speaking: Members of the VR&E team are often found providing presentations on military bases as well as at special forums sponsored by various organizations.
* Social media: VR&E embraces technology to support constant modernization efforts. Accordingly, the VR&E Outreach Team communicates through social media to conduct outreach activities to raise overall program awareness. Some commonly used VA-approved social media outlets include Facebook, twitter, Flickr, VAantage point, YouTube and Instagram. Please refer to [M28C.III.B.1.01](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_ssnew/help/agent/locale/en-US/portal/554400000001050/content/554400000143008/M28CIIIB1-Motivational-and-Outreach-Activities?query=social%20media#c.%20%20Use%20of%20Social%20Media%20B) for information regarding the appropriate use of social media.

All individuals can apply for the program either online at [va.gov](http://www.ebenefits.va.gov/) or on paper by using the VA Form 28-1900, Application for Veteran Readiness and Employment for claimants with Service-Connected Disabilities.

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The VR&E team is encouraged to make every effort to reach all potential claimants, even if they are receiving treatment at a military treatment facility, a VA Medical Center, or in their home. All Service members with a Serious illness or injury (SI) or a Very serious illness or injury (VSI) status should be considered as seriously disabled for the purposes of priority processing under the VR&E program. The Department of Defense provides the SI and VSI status designation. Verification of the status can be done through the VBA application Share. Applicants with an SI or VSI should be contacted within one business day of receiving the application and scheduled for their first appointment within five business days.

Slide 6:

To be eligible, individuals must have a:

* Qualifying military service—Retired United States military personnel or individuals who served in the U.S. Armed Forces and have received an Other than Dishonorable character of discharge and have a Compensable Service—Connected Disability rated at least 10%—Injury or disease determined to have been incurred or aggravated during active military service and compensated by VA.

Or,

* Integrated Disability Evaluation System (IDES)—Participating in the IDES process and/or awaiting discharge due to a medical condition resulting from a serious injury or illness that occurred in the line of duty.

Or,

* VA memorandum rating—An anticipated compensable rating of 20 percent or more for a Service member awaiting discharge.

Slide 7:

An individual may apply and qualify for automatic entitlement under provisions of the National Defense Authority Act (NDAA). Entitlement is based on the receipt of VA Form 28-1900, Veteran Readiness and Employment, and qualifying documentation for IDES, which includes the following:

* Referral to a military Physical Evaluation Board (PEB)
* Completed Military Service Status Referral (MSSR)
* Proof of participation in IDES (qualifying documentation)
* Attendance of the initial evaluation with the VRC

Eligibility and entitlement to VR&E services for these individuals is automatically established when all the following actions occur:

* VA receives VA Form 28-1900, Veteran Readiness and Employment
* Individual reports for the initial appointment
* VA receives appropriate qualifying documentation

Slide 8:

A memorandum rating is an anticipated compensable rating of 20% or more that is granted to an individual who is awaiting discharge from active military service and is hospitalized or receiving outpatient medical care, services or treatment for a Service-Connected Disability.

A memorandum rating is established for an individual who applies for VR&E benefits within six months prior to his/her discharge and 12 months after his/her discharge from active military service.

An individual may request a memorandum rating by completing [VA Form 28- 0588, Vocational Rehabilitation and Employment - Getting Ahead After You Get Out](https://vbaw.vba.va.gov/bl/20/cio/20s5/forms/VBA-28-0588-ARE.pdf).

Slide 9:

After it has been determined that the claimant meets the basic eligibility criteria, the VR&E Officer or designated employee will proceed with processing the claim.

It is required that staff set up alerts within the Veterans Benefits Management System, or (VBMS), so that applications are processed timely and efficiently. The alerts will inform the Program Support staff or designee of a new application.

The application and information about the claimant would then be entered into the case management system and there would be a system of record created. This is not done by the case manager but instead only completed by the VR&E Officer, or, in some offices, by the Program Support staff. The VRC may be responsible for assisting the individual with applying for services, such as completing the application. However, after that, the application would be processed by the VR&E Officer or Program Support staff.

The authorizing of the claim is not something counselors complete. This is done by the VR&E Officer or the Program Support staff. Authorizing the claim is categorized as the actions taken to either authorize and/or deny services in the case management system. A review of the claimant’s service time, type of discharge and disability rating helps ensure the minimum eligibility requirements are met. Authorizing the claim will create a system of record within the case management system which will start the entitlement process. This process is discussed further in the course.

For the purpose of checks and balances, whoever established the claim cannot authorize it. When a VRC establishes a claim, they must route the claim application to the VR&E staff member who authorizes it.

Slide 10:

VBMS Alerts for applications will notify users when a 28-1900 is uploaded to the eFolder and make it available for review in a single online location (i.e., notification queue). This will ensure that all applications are received and processed timely by the appropriate Regional Office. Every Regional Office must assign appropriate VR&E personnel for the VBMS user role, VRE Notification Reviewer, in Common Security Employee Manager (CSEM).

Once users log in, the alert appears as a blue banner at the top of the VBMS work queue page. Users will only see this banner if there are documented notifications for their station within the last 14 days. Therefore, it is important to monitor applications contained in the alert during the 14-day period to ensure all applications are tracked and processed. Users will click on the View Documents link in the blue banner to view the list of documents that are uploaded to the eFolder and will have the ability to save customizable filters within the VR&E notification queue.

Slide 11:

During the initial stages of application processing and scheduling, there are several essential steps to be taken. The applications should first be obtained from va.gov, and if received by other means, they should be stamped with the date. The applications must then be processed accurately and promptly, including conducting basic eligibility and the entitlement determination. If the claimant does not meet basic eligibility criteria, due process must be provided. Moreover, it is important to receive and process formal claims and respond to informal claims.

Slide 12:

During the application processing and scheduling, evidence is gathered to ensure informed decisions are made. This involves obtaining disability rating information from the claimant's claims folder in Veterans Benefits Management System (VBMS) and Share, as well as any additional information from the claimant when necessary. Memorandum ratings are also verified through Share and a Chapter 31 Generated Eligibility Determination (GED) is generated. For a better understanding of the GED, VRCs may refer to Appendix AE, GED Tear Sheet Sample.

Slide 13:

In the final stages of processing and scheduling a veteran's application for benefits, several actions are taken to ensure accuracy and efficiency. Information is retrieved from Share, Long Term Solution (LTS), and Corporate WINRS (CWINRS), which is then uploaded into the Veterans Benefits Management System (VBMS). The period of eligibility is then calculated, followed by the determination of the remaining entitlement for Chapter 31 and a review of any deferrals or extensions. Subsequently, a Vocational Rehabilitation and Employment (VR&E) record is created, and if applicable, claims may be disallowed. In such cases, procedural and appellate rights are provided to the claimant. These steps are crucial in ensuring that the veteran's application is processed correctly and promptly.

Slide 14:

The final step to completing the pre-evaluation activities involves scheduling an orientation/initial evaluation for the claimant. Once the VRC finishes processing the application and determines the individual is eligible for service, the VRC needs to schedule the initial evaluation appointment. Counselors have the option of contacting the individual by phone, with a letter or via email. The initial appointment should be scheduled soon after the application is processed.

If the VRC chooses to schedule it by letter, then they must send the claimant the appointment with VR-03, Initial Evaluation Appointment - Chapter 31 Orientation.

Slide 15:

Now that you’ve completed training on Pre-Evaluation Activities, you should be able to:

* Conduct outreach activities
* Identify eligibility requirements for VR&E services
* Determine if the claimant meets basic eligibility criteria
* Process an application
* Schedule the claimant for orientation/initial evaluation

Slide 16

The following M28C Procedure Manual references were used to create this training and can be read in further detail:

* [M28C.III.B.1.01 (Motivational and Outreach Procedures)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000143008/M28CIIIB1-Motivational-and-Outreach-Activities)
* [M28C.III.B.1.02 (Outreach Initiatives)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000143008/M28CIIIB1-Motivational-and-Outreach-Activities#1.02%20%20Outreach%20Initiatives%20B)
* [M28C.III.B.2.01 (Overview of the Integrated Disability Evaluation System Process)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000145426/M28CIIIB2-Chapter-2-Legacy-and-Integrated-Disability-Evaluation-System-Program#TOP%202.01%20%20%20%20Overview%20of%20the%20Integrated%20Disability%20Evaluation%20System%20(IDES)%20Process)
* [M28C.III.B.2.02 (Veteran Readiness and Employment Services Available to Service Members)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000145426/M28CIIIB2-Chapter-2-Legacy-and-Integrated-Disability-Evaluation-System-Program#TOP%20%202.02%20%20%20%20Vocational%20Rehabilitation%20and%20Employment%20(VR&E)%20Services%20Available%20to%20Servicemembers)
* [M28C.III.B.2.03 (Transition to Veteran Status)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000145426/M28CIIIB2-Chapter-2-Legacy-and-Integrated-Disability-Evaluation-System-Program#TOP%202.03%20%20%20%20Transition%20to%20Veteran%20Status)
* [M28C.III.B.2.04 (Impact of Public Law 110-181, Automatic Entitlement on Service Members)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000145426/M28CIIIB2-Chapter-2-Legacy-and-Integrated-Disability-Evaluation-System-Program#TOP%20%202.04%20%20%20%20Impact%20of%20Public%20Law%20110-181,%20NDAA%20for%20Fiscal%20Year%202008,%20on%20Chapter%2031%20Services%20to%20SMs)
* [M28C.III.B.2.05 (Applications Following Rehabilitation or Discontinuance)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000145426/M28CIIIB2-Chapter-2-Legacy-and-Integrated-Disability-Evaluation-System-Program#TOP%202.06%20%20%20%20Applications%20Following%20Rehabilitation%20or%20Discontinuance)
* [M28C.IV.A.1.02 (Eligibility Criteria)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000144548/M28CIVA1-Chapter-31-Application-Processing-and-Scheduling#TOP%201.02)
* [M28C.IV.A.1.03 (Memorandum Rating)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000144548/M28CIVA1-Chapter-31-Application-Processing-and-Scheduling#1.03%20%20B)
* [M28C.IV.A.1.07 (Priority Scheduling for Seriously III or Injured Claimants)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000144548/M28CIVA1-Chapter-31-Application-Processing-and-Scheduling#1.07%20%20B)
* [M28C.IV.A.1.12 (Initial Evaluation Appointment)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001050/content/554400000144548/M28CIVA1-Chapter-31-Application-Processing-and-Scheduling#1.12%20%20b)

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Thank you for your dedication and commitment to the VR&E mission. This concludes the training.