**VRE-NCT-02-Initial Orientation Script**

Slide 1:

Welcome to VR&E Initial Orientation training. The training is designed to help VR&E staff understand how to conduct an initial orientation appointment for Ch. 31 Services as part of the comprehensive evaluation.

Slide 2:

Upon completion of Initial Orientation, you will be able to:

* Explain the purpose of the initial orientation.
* Describe the factors involved in conducting a successful orientation.

Slide 3:

Information gathered during the initial orientation will allow the VRC to make an entitlement decision. By this point, the application has been processed and the claimant has been notified that he or she is eligible for services. The VRC will be working on:

* scheduling an initial orientation appointment
* researching pertinent information about the claimant
* conducting an initial orientation
* collecting evidence

This will assist the VRC in making decisions about entitlement. The VRC will need to be familiar with these activities as he or she provides the claimant with information about the program and how to proceed with the process. Let's take a moment to further explore this process.

Slide 4:

The purpose of an initial orientation is to inform claimants about Ch. 31 services and to obtain additional documents required to continue the evaluation process. The VR-03, Initial Evaluation Appointment - Chapter 31 Orientation letter is sent to the claimant prior to the initial orientation. It provides details about the appointment, the process and exactly what to bring to the meeting. It is highly recommended that the orientation video be sent to the claimant prior to the appointment.

When the claimant reports to the appointment the VRC must ensure the claimant has a thorough understanding of the VR&E program and a comprehensive evaluation to determine if he or she is entitled to Veteran Readiness and l Employment services.

During the initial orientation, the VRC or another VR&E staff member will provide information to claimants about the Ch. 31 program including eligibility and entitlement requirements, 5 tracks to employment and services offered through the program. This may be done in a group setting or individually. After the initial orientation, the VRC will conduct an individual, private, comprehensive evaluation with the claimant to gather information leading to an entitlement decision. Documents such as the 1902w or information captured from it, training records or transcripts, resumes and medical records will help VRCs make this determination.

Slide 5:

Possible locations for the Initial Orientation are:

* Remote/Virtually
	+ VA Video Connect platform to conduct Tele-counseling
* College/University Campus
* Military Installation
* VA Regional Office
* Out Based Office
	+ Community Based Outpatient Clinic (CBOC)
	+ Vet Center
	+ Community

Slide 6:

Consider the initial orientation appointment as the claimant’s first time interacting with anyone from the VR&E program. He or she may not even understand what the program does. It is imperative that VRCs establish a rapport as quickly as possible with the claimant. Use this opportunity to share exactly what the program is and how it can help the claimant. It will help to eliminate any incorrect assumptions and provide a clear and correct understanding of the benefits and services available.

Slide 7:

Discuss the scope of the program using Appendix EJ, Veteran Readiness and Employment (VR&E) Program Orientation.

Ensure to express:

* The purpose of the program is to assist claimants with service-connected disabilities to prepare for, obtain and maintain suitable employment and/or live as independently as possible.
* Ch. 31 services are based on a partnership between the VRC and the claimant.

Note: Taking time to discuss the purpose of the program using these resources helps to identify and provide a clear understanding of the benefits and services available, the process for providing them and its intent.

Slide 8: Obtain the documents during the initial orientation. Several documents should be reviewed and signed by the individual if applicable. The documents are:

* VA Form 28-1902w, Veteran Readiness and Employment Questionnaire
	+ If the claimant does not complete the VAF 28-1902w:
		- Record information from VAF 28-1902w in an electronic case note, do not refuse the claimant an initial orientation appointment. The VAF 28-1902w form is not required. However, the information on the form is important and allows the VRC to make an informed entitlement decision. Please note that the VRC can assist the claimant with completing the VAF 28-1902w, if needed.
* Obtain a signed copy of VAF 28-8739a, Protection of Privacy Information Statement
* VA Form 20-0968, Claim for Reimbursement of Travel Expenses
* Training Records or Transcripts (if available)
* Resume (if available)
* VA medical records through CAPRI – Compensation and Pension Records Interchange

If a VRC needs to share or obtain information from external sources, he or she will need the claimant to complete VA Forms 21-4142, Authorization and Consent to Release Information. It is not necessary to have consent to coordinate or communicate with the claimant's VHA provider(s). Most medical information from VHA can be obtained through CAPRI.

Slide 9:

What happens if the claimant misses the initial appointment? It’s a VR&E best practice to reach out to the claimant on the same day, or even during the appointment via phone, text message or email. If the VRC reaches the claimant, he or she can go ahead and reschedule the appointment. If the claimant can’t be reached, the VRC will send the VR-15, Missed Appointment Letter. This letter provides 10 days for the claimant to contact VR&E to reschedule. The VRC should diary it on his or her calendar because if the claimant doesn’t respond, the VRC will need to send a VR-58, CH 31 Adverse Decision Letter and VAF 0998 and discontinue the case. If the claimant is reached and he or she is no longer interested and asks to withdraw the claim, the VRC will also send the VR-58 Letter.

If the claimant comes to the appointment and then wants to withdraw, he or she may do so if the following criteria are met:

* A sufficient portion of the comprehensive assessment was not completed to render an entitlement determination. Specifically, a discussion regarding the claimant’s disability limitations, civilian work experience, military experience and education was not completed as this information is needed, at minimum, to identify if an employment handicap exists.
* The claimant was not informed that he or she is entitled.
* The claimant indicates he or she is no longer interested in pursuing VR&E services after learning about the program.
* VRCs should note attempts to contact the claimant if not using e-VA.

Slide 10:

The VRC must update CWINRS when the individual reports for his or her initial orientation and/or evaluation. If the claimant reports to the scheduled initial evaluation, select EP status, use the date the claimant reports to the evaluation or orientation session and select Reason Code (RC) 002, Claimant reports to the initial evaluation.

If the claimant fails to report for the initial evaluation appointment, send the claimant a 10-day follow-up letter.

If the claimant does not respond after the 10-day period, select DIS status, use the date of the decision and select RC 003, Non-Pursuit. Select Detailed Reason Code (DRC) 03I - No Response after Due Process.

If the claimant responds during the 10-day period and provides the reason he or she cannot participate at this time, select DIS status, use the date of the decision and select RC-003, Non-Pursuit. Select the appropriate DRC.

Refer to M28C.III.A.1.02.j. for information on DRCs.

If a claimant’s SCD rating is reduced to a non-compensable level, severed or the claim is declared ineligible such as if the GED processed incorrectly granted eligibility,

select DIS status, use the date of the reduction or severance and select RC 039, SCD severed or reduced to 0%.

If a claimant requests to close his or her claim, select DIS status, use the date of the request and select RC 098, Claimant requests case closure.

If the claimant’s death is confirmed, select DIS status, use the date the claimant’s death is discovered and select RC 099, Death confirmed.

Refer to M28C.III.A.1 for information on case status movement. Refer to the CWINRS User Guide for additional information on updating CWINRS for eligibility, entitlement and scheduling-related actions.

Slide 11:

The following are best practices as it relates to the Initial Evaluation:

* Schedule the claimant as soon as possible
* Ask the claimant if he or she has any questions about VR&E or Orientation
* Inform the claimant of the purpose of the meeting
* Explain what the entitlement criteria is
* Explain any decision you make and why
* Inform the claimant of the laws and regulations you are basing your decision on
* Be transparent
* Be respectful
* Be compassionate
* If you do not know the answer to a question, let them know that you will get the answer and provide them with an answer by a certain time and follow through

Slide 12:

The following are tools for Initial Evaluation:

* Previous evaluation of abilities, aptitudes and interests
* Results of vocational and/or psychological assessments
* Results of evaluations and reevaluations by a medical consultant
* Recommendations obtained from the Vocational Rehabilitation Panel (VRP)
* Information obtained from VA Health Administration (VHA) and/or the claimant’s private medical records
* Information obtained from State vocational rehabilitation counselors
* Current and previous VAF 28-1902w

Slide 13:

Now that you have completed this training, you are able to:

* Explain the purpose of the VR&E Orientation
* Describe the factors involved in conducting a successful orientation

Slide 14:

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