#### Transmittal Sheet

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| Introduction | This is the initial release of the Benefits Assistance Service (BAS) Manual, M27-1 |

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| Date Submitted | September 17, 2012 |

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| Overview of the M27-1 | The M27-1 consists of an introduction and four parts:   * Introduction * Part I: Quality Client Services Program * Part II: Outreach Services Program * Part III:   + Subpart i: Web Services   + Subpart ii: Social Media Services * Part IV: Quality and Training |

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| BAS Manual Introduction | The introduction of the manual provides information on the structure of the Veterans Benefits Administration (VBA) and the BAS, including the staff functions within the BAS. |

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| Part I: Quality Client Services Program | Part I of this manual consists of the following chapters:   * Chapter 1: General Information on the Quality Client Services Program * Chapter 2: Customer Service * Chapter 3: Telephone Interviews * Chapter 4: Personal Interviews * Chapter 5: Correspondence * Chapter 6: Inquiry Routing and Information System (IRIS) * Chapter 7: Freedom of Information Act (FOIA) and Privacy Act (PA) * Chapter 8: Reference Information |

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| (continued) | Chapter 1 (General Information on the Quality Client Services Program) consists of the following topics:   * Topic 1: The Mission and Responsibilities of the Quality Client Services Program * Topic 2: The Intake Specialist   Chapter 2 (Customer Service) consists of the following sections:   * Topic 1: Overview of Customer Service * Topic 2: Providing Information to a Third Party * Topic 3: Providing Information About VA Benefits * Topic 4: Providing VA Information to Support Non-VA Related Benefits * Topic 5: Procuring Vital Statistics Documents * Topic 6: Handling Non-Claims Actions * Topic 7: Claimant Representation by Non-Attorney or Non-Accredited Agents * Topic 8: Handling Media Inquiries   Chapter 3 (Telephone Interviews) consists of the following topics:   * Topic 1: General Guidelines for Conducting Telephone Interviews * Topic 2: Personal Phone Calls * Topic 3: Call Referral Guidelines * Topic 4: Quality Interview Expectations * Topic 5: Prescribed Opening and Closing of Calls * Topic 6: Courtesy Tips * Topic 7: Recognizing Caller “Types” * Topic 8: Handling Threatening or Abusive Calls * Topic 9: Handling Requests for Speak with Specific Individuals * Topic 10: When to Refer a Call to a Supervisor * Topic 11: Suicidal Callers * Topic 12: Change of Address and Direct Deposit Request Procedures * Topic 13: Non-Receipt of Payment Procedures |

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| (continued) | * Topic 14: Releasing Information From a Rating Decision or Award Letter * Topic 15: Identification Protocol * Topic 16: Business Rules for Generating a Veterans’ Assistance Inquiry (VAI) * Topic 17: Decision review Officer (DRO) Elections Via Telephone   Chapter 4 (Personal Interviews) consists of the following topics:   * Topic 1: General Guidelines for Conducting Interviews * Topic 2: Waiting Area * Topic 3: Interview Area * Topic 4: The Interview Process * Topic 5: Tips for Successful Interviewing * Topic 6: Dealing With Unruly or Threatening Behavior   Chapter 5 (Correspondence) consists of the following topics:   * Topic 1: General Guidelines for Processing Correspondence * Topic 2: Signature Authority for Correspondence * Topic 3: Acknowledging Correspondence * Topic 4: Reader-Focused Writing (RFW) * Topic 5: Handling Various Types of Correspondence * Topic 6: Preparation of Correspondence * Topic 7: Freedom of Information Act and Privacy Act Issues * Topic 8: Developing Claims Using Telephone, Email and Facsimile * Topic 9: Contacting Claimants or Veterans Using Mail, Email and Facsimile * Topic 10: Using VA Form 21-0820 (Series) * Topic 11: Determining Work Credit for General or Special Correspondence * Topic 12: References for Help in Writing |

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| (continued) | Chapter 6 (Inquiry Routing and Information System (IRIS)) consists of the following topics:   * Topic 1: IRIS Policy and Procedures * Topic 2: IRIS Responses * Topic 3: Timeliness Standard for Responses * Topic 4: IRIS Security * Topic 5: Reporting Work Credit * Topic 6: IRIS-Related References   Chapter 7 (Freedom of Information Act (FOIA) and Privacy Act (PA)) consists of the following topics:   * Topic 1: General Information on the FOIA and PA * Topic 2: Duties of the FOIA and PA Officer * Topic 3: FOIA Exemptions * Topic 4: Redaction Guidelines * Topic 5: General Key Points for FOIA/PA * Topic 6: Guidance on Release of Information Pertaining to Veterans * Topic 7: Procedures for Handling PA Requests * Topic 8: Determining Appropriate Work Credit for FOIA/PA Requests * Topic 9: Procedures for Use of FOIA Reading Room * Topic 10: References   Chapter 8 (Reference Information) consists of the following topics:   * Topic 1: VA Forms * Topic 2: VA Publications and Pamphlets * Topic 3: Web Based References * Topic 4: Writing References |

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| Part II: Outreach Services Program | Part II of this manual consists of the following chapters:   * Chapter 1: Overview of Outreach Services Program * Chapter 2: Special Outreach Programs   Chapter 1 (Overview of Outreach Services Program) consists of the following topics:   * Topic 1: Overview of Outreach Services Program * Topic 2: General Outreach Guidelines * Topic 3: Annual Review * Topic 4: Special Outreach – Target Populations * Topic 5: Reporting Outreach Activities   Chapter 2 (Special Outreach Programs) consists of the following topics:   * Topic 1: Veterans Outreach at VHA Facilities * Topic 2: Homeless and Justice-Involved Veterans * Topic 3: Women Veterans * Topic 4: Military Outreach * Topic 5: Survivors of Service Members Who Die on Active Duty * Topic 6: Other Survivors and Dependents * Topic 7: Minority and Tribal Veterans * Topic 8: Elderly Veterans * Topic 9: Former Prisoners of War (FPOW) * Topic 10: Indigent Veterans and Unclaimed Remains * Topic 11: First Time Applicants * Topic 12: Foreign Service Program * Topic 13: Rural Veterans Outreach * Topic 14: Chapter 63 Special Outreach to Veterans * Topic 15: Casualty Assistance Program Procedures |

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| Part IIISubpart i: Web Services | Part III, Subpart i of this manual consists of the following chapters:   * Chapter 1: Server Technology * Chapter 2: Web Procedures * Chapter 3: Web Content * Chapter 4: Enterprise Content Management System (ECMS) * Chapter 5: Federal Government Laws, Regulations, Executive Orders, and Office of Management and Budget (OMB) Directives * Chapter 6: e-Benefits * Chapter 7: VA In-Person Proofing Process   Chapter 1 (Server Technology) consists of the following topics:   * Topic 1: Server Technology * Topic 2: Supported Platforms   Chapter 2 (Web Procedures) consists of the following topics:   * Topic 1: Requesting a Website * Topic 2: Developing a Website * Topic 3: VA Web Registry * Topic 4: Removing a Website * Topic 5: Requesting a Domain/URL Name Change * Topic 6: Requesting Permission to Use a Non-va.gov Domain Name   Chapter 3 (Web Content) consists of the following topics:   * Topic 1: Content Defined * Topic 2: Principal Parties Responsible for Content * Topic 3: VBA Internet Sites and VA’s Outreach Responsibilities * Topic 4: Organization of Information * Topic 5: Readability * Topic 6: Information Quality Defined * Topic 7: Actions to be Taken When Accuracy of Information is Called Into   Question   * Topic 8: Completeness of Information |

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| Part III (continued) | * Topic 9: Ensuring Content is Current: Annotating Updates * Topic 10: Avoidance of Duplication: Linking to Authoritative Sources * Topic 11: Uniformity * Topic 12: Translation Into Other Languages * Topic 13: Complying With Digital Rights, Copyright, Trademark, and Patent Laws * Topic 14: Avoiding Apparent Endorsements * Topic 15: Post Privacy Policy * Topic 16: Easy Access to Online Services * Topic 17: Easy Access to Online VA Forms * Topic 18: Avoidance of Content or Applications That Require a Specific Brower for Viewing (Prohibited Practice) * Topic 19: Audio and Video Broadcasts   Chapter 4 (Enterprise Content Management System (ECMS)) consists of the following topics:   * Topic 1: VA Enterprise Content Management System * Topic 2: New Site Creation * Topic 3: Existing Site Creation * Topic 4: TeamSite Administrative Tool * Topic 5: User Roles * Topic 6: Training * Topic 7: Workflows   Chapter 5 (Federal Government Laws, Regulations, Executive Orders, Office of Management and Budget (OMB) Directives) consists of the following topics:   * Topic 1: Federal Requirements |

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| Part III (continued) | Chapter 6 (e-Benefits) consists of the following topics:   * Topic 1: e-Benefits   Chapter 7 (VA In-Person Proofing Process) consists of the following topics:   * Topic 1: Overview of VA In-Person Proofing Process * Topic 2: DoD Self Service Access Station Web Application * Topic 3: Veteran Not Found in DEERS * Topic 4: Updating the Veteran Address * Topic 5: Reporting Potentially Fraudulent Accounts * Topic 6: Other Application Functions * Topic 7: Appendix A: Identity Documentation Criteria * Topic 8: Appendix B: Address Confirmation Document Criteria |

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| Part IIISubpart ii: Social Media Services | Part III, Subpart ii of this manual consists of the following chapters:   * Chapter 1: Overview of Social Media * Chapter 2: Description of Social Media * Chapter 3: Roles and Responsibilities * Chapter 4: Social Media Procedures * Chapter 5: Agency and Federal Requirements   Chapter 1 (Overview of Social Media) consists of the following topics:   * Topic 1: Overview of Social Media   Chapter 2 (Description of Social Media) consists of the following topics:   * Topic 1: Facebook * Topic 2: Twitter   Chapter 3 (Roles and Responsibilities) consists of the following topics:   * Topic 1: Roles and Responsibilities * Topic 2: Appendix A: Submission Guidelines for Social Media/Web |

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| (continued) | Chapter 4 (Social Media Procedures) consists of the following topics:   * Topic 1: Social Media Procedures   Chapter 5 (Agency and Federal Requirements) consists of the following topics:   * Topic 1: Agency References * Topic 2: Federal References |

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| Part IV: Quality and Training | Part IV of this manual consists of the following chapters:   * Chapter 1: Quality * Chapter 2: Training   Chapter 1 (Quality) consists of the following topics:   * Topic 1: General * Topic 2: Telephone Interview Activity * Topic 3: Inquiry Routing and Information System (IRIS) – Electronic Correspondence * Topic 4: Site Visits * Topic 5: Systematic Analyses of Operations (SAO) * Topic 6: NCC Management Advisory Council * Topic 7: NCC/NPCC/NIRC Manager Conference   Chapter 2 (Training) consists of the following topics:   * Topic 1: General * Topic 2: Types of Training * Topic 3: Formal Training Requirements * Topic 4: Training Resources |

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| Notable Changes Included in This Release | Previously, Part I (Quality Client Services) was located in the M21-1MR and titled as Part II (Direct Services).  All manual content previously located in Part II of the M21-1MR is now incorporated into this initial release of the M27-1. |

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| Rescissions | This initial release will rescind the following in its entirety:   * M21-1MR, Part II (Direct Services) |

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| Authority | By direction of the Under Secretary for Benefits |

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| Signature | Robert Reynolds, Director  Benefits Assistance Service (27) |

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| Distribution | Distribution: RPC: 2068  FD: EX: ASO and AR (included in RPC 2068  **LOCAL REPRODUCTION AUTHORIZED AS NEEDED** |