#### 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, DirectorBenefits 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** |