

May 2, 2006

**OUTREACH AND CASE MANAGEMENT OF ACTIVE DUTY SERVICE MEMBERS  
ON PHYSICAL EVALUATION BOARD LIST**

**1. PURPOSE:** This Veterans Health Administration (VHA) Directive establishes policy for providing outreach and case management services to active duty service members who are entering the Department of Defense (DOD) Physical Evaluation Board (PEB) process.

**2. BACKGROUND**

a. VHA's core mission is to care for former service members disabled in their service to our country. The Department of Veterans Affairs (VA) established the Office of Seamless Transition to improve the transition of service members from the military to VA and back to civilian life, particularly for service members injured while serving our country in Operation Enduring Freedom (OEF) and Operation Iraqi Freedom (OIF). The seamless transition program was initially created to support OEF and OIF service members and is intended to become a permanent process that will support all service members who, as a result of injury or illness, enter the disability process leading to medical separation or retirement.

b. DOD Health Affairs is providing the VA Office of Seamless Transition with a list containing information on service members who enter the PEB process. These service members sustained an injury or developed an illness that may preclude them from continuing on active duty and result in medical separation or retirement. Historically, approximately 95 percent of the 25,000 service members who enter the PEB process annually are medically separated or retired. The remaining five percent are retained on active duty. The list will enable the Veterans Benefits Administration (VBA) to contact active duty service members to initiate benefit applications and disability compensation claims processing and VHA to offer future health care services at VA medical centers. The list will be available electronically to each Veterans Integrated Services Network (VISN), VA medical center and VA Regional Office (RO) based on the service members currently located in their primary service area.

c. This Directive does not require VA medical centers to provide routine health care services until the service member is discharged from active duty status. VA will always treat active duty service members needing urgent medical care prior to obtaining authorizations due to the nature of urgent care. Appropriate authorizations will be obtained after treatment is rendered.

**3. POLICY:** It is VHA policy that each VA medical center must provide outreach to each service member on the PEB list describing the VA health care benefits to which they may be entitled and encouraging them to contact the nearest VA medical facility for future health care needs as they transition from active duty to veteran status.

**THIS VHA DIRECTIVE EXPIRES MAY 31, 2011**

## VHA DIRECTIVE 2006-025

May 2, 2006

### 4. ACTION

a. **Medical Center Director.** The Medical Center Director is responsible for ensuring:

(1) A PEB Case Manager, preferably a social worker or nurse, is designated to facilitate transferring health care services for individuals on the PEB list who are interested in receiving VA services following their discharge from the military. Ongoing clinical case management services should be provided for service members who require that level of support.

(2) That an outreach letter and phone call are initiated to each individual on the PEB list within 30 days of receipt of the PEB list.

(a) The outreach letter is a welcome letter describing VA health care benefits which is sent to each service member on the PEB list (see Att. A). This letter encourages service members to contact the nearest VA medical facility and provides the name and number of the PEB Case Manager at that location who will facilitate transferring health care services as they are discharged from the military. **NOTE:** *Each PEB list will contain new individuals only. A service member remaining in the PEB process for several months will only appear on the list once, when they enter the process.*

(b) The follow-up phone call must be made to each service member on the PEB list to again describe VA health care benefits and to encourage them to seek health care services through the nearest VA as they are discharged from the military. **NOTE:** *The PEB list contains contact information such as address and telephone numbers VA can use to contact these service members.*

b. **PEB Case Manager.** The principal role of the PEB Case Manager is to assist in transitioning health care services to the VA medical center and to provide ongoing case management services to service members and their families during and after the transition period. **NOTE:** *It is recommended that the case manager be a social worker or nurse so they can provide clinical case management services.* Other responsibilities include:

(1) Ensuring that initial transfer of care activities are coordinated (ensuring appointments are scheduled; ensuring the provision for necessary durable medical equipment, prosthetic devices, and supplies).

(2) Ensuring the transfer of copies of the military medical record from the DOD Medical Treatment Facility (MTF).

(3) Coordinating the completion of all necessary paperwork for the transfer of care, including application for VHA medical benefits.

(4) Making initial contact with the service member prior to transfer of health care from the MTF to provide the Case Manager's name and phone number and to explain the role of the Case Manager.

(5) Serving as the contact person for the family and regularly communicating with the service member and family during the transition period.

(6) Working closely with the service member's interdisciplinary treatment team, at both the MTF and VA medical center, to ensure good communication and treatment planning.

(7) Communicating and collaborating closely with the VBA PEB Point of Contact, as needed, to ensure that the service member is made aware of VA benefits and provided guidance on how to apply for those benefits.

(8) Documenting all activity in the Computerized Patient Record System (CPRS).

(9) Tracking PEB workload. Local or manual tracking is necessary until a national solution is developed and implemented.

**5. REFERENCES:** Memo dated 4/12/06 re Physical Evaluation Board (PEB) List

**6. FOLLOW-UP RESPONSIBILITY:** The Director, Seamless Transition (10AT) is responsible for the contents of this Directive. Questions are to be referred to (202) 273-7822.

**7. RESCISSION:** None. This VHA Directive expires May 31, 2011.

Jonathan B. Perlin, MD, PhD, MSHA, FACP  
Under Secretary for Health

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ATTACHMENT A

SAMPLE LETTER WELCOME LETTER DESCRIBING DEPARTMENT OF  
VETERANS AFFAIRS (VA) HEALTH CARE BENEFITS

[Date]

[Name]  
[Address]  
[City, State, Zip]

[Name],

You are receiving this letter because the Department of Defense notified the Department of Veterans Affairs (VA) that you have entered the Physical Evaluation Board (PEB) process. Should your illness or injury preclude you from continuing on active duty and result in a medical separation or retirement, please be assured the VA stands ready to serve you.

As you transition from the military, VHA invites you to contact the local VA medical facility located near you for any future health care needs. VHA's enhanced health benefits plan, for which you may be eligible, emphasizes preventive and primary care and offers a full range of outpatient and inpatient services within the VA health care system to include:

- a. **Preventive Care Services:** Immunizations, Physical Examinations, Health Care Assessments, Screening Tests, Health Education Programs
- b. **Ambulatory (Outpatient) Diagnostic and Treatment Services:** Emergency outpatient care, Medical, Surgical (including reconstructive/plastic surgery as a result of disease or trauma), Chiropractic Care, Mental Health, Bereavement Counseling, Substance Abuse
- c. **Hospital (Inpatient) Diagnostic and Treatment:** Emergency inpatient care, Medical, Surgical (including reconstructive/plastic surgery as a result of disease or trauma)

For more information, visit the VA website at: <http://www.va.gov> , or contact your local VA Medical Center at:

[VA Medical Center]  
[Address]  
[City, State, Zip]

Point of Contact: [Name]  
[Telephone Number]

On behalf of the staff at the \_\_\_\_ (VA Medical Center) \_\_\_\_, we thank you for your service and we look forward to serving you.

Respectfully,

[Name]  
[Title]