

**MEMORANDUM OF AGREEMENT
BETWEEN
DEPARTMENT OF VETERANS AFFAIRS
AND
DEPARTMENT OF DEFENSE**

SUBJECT: Implementation of Separation Health Assessments for separating/retiring Service members by the Department of Defense and the Department of Veterans Affairs

1. **PURPOSE:** This Memorandum of Agreement (MOA) between the Department of Veterans Affairs (VA) and the Department of Defense (DoD) addresses responsibilities of each party to support a coordinated, standardized Separation Health Assessment (SHA) process that supports the VA disability compensation program and the mandatory DoD Separation History and Physical Examination program.

Implementation of the comprehensive SHA at separation provides many benefits for Service members (SMs), as well as for DoD and VA. The use of standardized health assessments allows for a comprehensive medical evaluation of each SM at separation. Any current or past medical concerns identified during his or her military career, along with the SM's health status and medical history will be documented as part of the longitudinal health history at the end of active service. It is also possible that the SHA may uncover a previously undiagnosed medical condition that occurred during service. SHAs can be used by DoD to recognize and prevent illnesses and injuries arising from military service by mitigating or eliminating occupational exposures and physical hazards in military workplaces, where feasible. For VA, SHAs allow for more efficient identification of Service-connected conditions and subsequent delivery of current or future veteran disability benefits. Aggregated information from SHAs can be used to more adequately project health care services required for those who will either continue to use DoD or seek VA health care services. When potential adverse health outcomes of documented exposures are identified, information from SHAs can be utilized for targeted outreach to veterans who may be affected. The goal of the SHA process is to capture the SM's current health assessment information at separation in a way that is easily accessible by both DoD and VA.

2. **BACKGROUND:** In 2010, the Joint Executive Committee approved the implementation of a joint DoD/VA workgroup that developed and piloted a DoD and VA supported joint, standardized SHA program. The Secretaries of Defense and VA acknowledged their commitment to full implementation of a comprehensive, standardized SHA applicable to separating SMs and supported through the resources of both DoD and VA in December 2012.

3. **SCOPE AND APPLICABILITY:** Those SMs affected by this MOA are all members of the Military Services who are scheduled to be separated from Active Duty, including Reserve Component SMs to be released from Active Duty to which called or ordered for more than 180 days, with the exception of certain Selected Reserve members who were never activated or deployed.

- a. To provide comprehensive evaluation, the VA may use the general medical SHA disability examination template in accordance with other MOAs in effect for all pre-

separation claims. Local agreements, based on national guidance, will be implemented to avoid duplication of efforts between the two agencies.

- b. SMs must file a VA disability claim within the time allowed in accordance with current pre-discharge claim timelines. The Veterans Benefits Administration (VBA) must obtain a copy of the SMs' service treatment records (STRs) from all periods of Active Duty, and a DD Form 2807-1, "Report of Medical History," endorsed by the SM before the VBA will request a SHA. VA can assure return of the SHA to DoD at least 30 days prior to date of separation, when the examination is requested at least 90 days prior to the SM's release from Active Duty.
- c. SMs who have filed a VA disability claim within the timelines above may have their disability examinations and SHA completed at a VA medical center or by a VA contracted examiner, depending on existing local protocols and resources. Information on SMs who have filed a pre-discharge claim with VA must be provided to DoD. VA and DoD will work together to develop an implementation plan that ensures that this information is available in a way that allows local commands to manage the program.
- d. SMs who fail to report to their scheduled disability examinations and SHA may not meet applicable timelines to complete the SHA with VA and may be required to complete their SHA with DoD. VA and DoD will work together to develop an implementation plan that addresses how no-shows will be managed.

4. **REQUIREMENTS FOR SHA:** The SM must complete a SHA, which includes a subjective assessment of health and a physical examination with a privileged health care provider, within 180 days prior to separation.

- a. **Components of the SHA.** Regardless of which Department performs the SHA, it will include:
 - 1) **Subjective Assessment of Health.** SMs will complete and sign their portion of the DD Form 2807-1, "Report of Medical History," prior to their scheduled examination. The DoD or VA licensed examiner performing the SHA examination will complete the examiner's section.
 - 2) **Objective Assessment of Health.** The health care provider will review the SM's complete medical history including the DD 2807-1, the SM's current health status, and need for referral for treatment or further evaluations for medical concerns. SMs will meet with a licensed, privileged health care provider to address any medical concerns or pertinent responses from the DD Form 2807-1. The provider will comment on all positive responses the SM made on the DD Form 2807-1 as part of the objective assessment of the health portion of the SHA.

a) The specific elements of DD Form 2808, "Report of Medical Examination," version dated October 2005, described below will be completed as part of the examination performed:

- i. Blocks 1–9, 15, 16 - Demographics
- ii. Blocks 17–44 - Clinical Evaluation
- iii. Blocks 53, 54, 57, 58 - Height, Weight, Pulse, Blood Pressure
- iv. Block 71 - Audiogram. All separating/retiring SMs must receive a threshold air conduction audiogram within 180 days of separation. If a current threshold audiogram is not present in the SM's health treatment records, a threshold audiogram must be conducted.
- v. Block 77 - Summary of Defects and Diagnoses
- vi. Block 81 - Name of Examiner

- b. Specialty Examinations. The SHA does not necessarily require invasive internal examinations (e.g., rectal or pelvic) provided it is not clinically indicated by risk factors. All preventive medical screenings required by DoD policy should have been accomplished prior to the SHA. If there is any indication for any additional examinations from the history, review of systems, or screening examination, or because the SM has filed a claim for such a condition for which the examination is required, then it will be accomplished. Ophthalmological/optometric, or dental examinations conducted by a specialist are not required unless the history or screening examination indicates a condition exists that in the opinion of the examining provider requires further specialty evaluation.
- c. Timing of Mandatory SHA: A SHA will be considered current if done within 180 days of separation, unless the SM deployed within 180 days of separation. In that case, the SM will receive his/her SHA after the deployment, but prior to separation, to reflect his or her most current medical condition.

5. **RESPONSIBILITIES**: DoD and VA will commit appropriate resources to ensure that the SHA supports both the VA disability compensation program and DoD Separation/Retirement Physical Examination program. Current agreements developed locally to support other pre-discharge programs should be leveraged and/or amended to support this agreement.

Both Departments will ensure that their providers and ancillary staff, as necessary, have access and training on the use of the Bidirectional Health Information Exchange (BHIE) or other mutually agreeable information system with appropriate patient information protection and capabilities which allows clinicians from both agencies to view electronic health care data from each other's systems.

a. DoD will:

- 1) Perform SHAs on all SMs not submitting a VA claim for disability compensation, or when the SHA cannot be returned to DoD by VBA within the timeframes required by DoD.
- 2) If VA is responsible for the completion of the SHA as part of a disability examination in support of a SM's claim for VA benefits, ensure that all available medical records including:
 - a. SM's STR to date (direct and purchased health care records);
 - b. deployment and occupational health records;
 - c. a current DD Form 2807-1 endorsed by the SM;
 - d. mental health records, if applicable;
 - e. a baseline and most current audiogram, (if available).

are made available to VA prior to the SHA, either electronically or by other mutually agreeable information system that meets privacy requirements for transfer of medical information (with paper records as a last resort) prior to the SHA examination.

- 3) Provide evaluation and treatment for any conditions documented or discovered during the SHA until separation and as required by applicable laws, regulations, and policy.
- 4) Ensure SMs complete a SHA before the DD Form 214 is issued.
- 5) Work with VA to develop procedures that assist in tracking SMs' completion of SHAs, whether conducted by VA or DoD.

b. VA will:

- 1) Accept a pre-discharge claim for VA disability compensation from any SM who is within 180 days of separation or at the earliest time allowed in accordance with current pre-discharge claim timelines.
- 2) Perform the comprehensive history and physical exam portions of the SHA according to the prescribed elements of the SHA outlined in Section 4 as part of a comprehensive disability examination to support pre-discharge claims for disability benefits. All appropriate examinations for claimed conditions, as requested by a VBA representative in support of the SM's claim for VA disability benefits, will be conducted according to VA protocols.
- 3) Schedule the SM for disability examinations, which include the SHA elements, within 30 days of receipt of exam request.

- 4) Provide DoD with electronic access, when and where available, to the completed VA SHA disability examinations performed in support of SHA requirements in a mutually agreeable format that is accessible to clinical providers. The SHA formatted examination will be shared through BHIE, or another mutually agreeable information system that meets privacy requirements for transfer of medical information (with paper records as a last resort) at least 30 days prior to the SM's date of separation.
- 5) Work with DoD to develop local procedures that assist in tracking completion of disability examinations that are performed by VA to meet the SHA requirement for the SM to receive a DD Form 214.
- 6) Where findings are identified during the examination that a reasonable health care provider would report to a patient, the SM will be advised of the findings. Any test or examination results that a reasonable health care provider would report to a patient's treating physician must be immediately communicated to the SM and to the local Military Treatment Facility (MTF) point of contact (POC). Local agreements must ensure that MTFs identify a POC prepared to receive calls from VA examiners or dedicated VA staff identifying such findings or results.

6. **RESOURCES:**

- a. Benefits Delivery at Discharge (BDD): Refer to MOA between the VA, "VA and DoD, Implementation of Cooperative Separation Process/Examinations for the DoD and VA at BDD sites," November 17, 2004.
- b. Integrated Disability Evaluation System: Refer to MOA between the VA and DoD, "Expansion of the DoD/VA Integrated Pilot Disability Evaluation System – Providing a Single Disability Evaluation/Transition Medical Examination and Single Source Disability Rating," January 16, 2009.
- c. Transition Assistance Program: Refer to Under Secretary of Defense for Personnel and Readiness Directive-type Memorandum 12-007, "Implementation of Mandatory Transition Assistance Program Participation for Eligible Service Members," November 21, 2012.
- d. Sharing of Protected Health Information and other Individually Identifiable Information between DoD and VA and its Components, 2005.

7. TERMS OF MOA:

- a. DoD, through the Office of the Assistant Secretary of Defense for Health Affairs, is responsible for the development and maintenance of this MOA and for the establishment of an implementation plan.
- b. VA, through the Office of Disability Management and Assessment, is responsible for the development and maintenance of this MOA and for the establishment of an implementation plan.
- c. This agreement will be effective as of the date of the last signature.
- d. Requests for modification of this agreement will be submitted in writing from one party to the other, not less than 30 days prior to the desired effective date of such modification.
- e. This agreement will be renewed automatically on its anniversary date unless either party gives a written 30-day notice of termination.

Department of Defense

By: 
JESSICA L. WRIGHT
ACTING UNDER SECRETARY
FOR PERSONNEL AND READINESS

Date 8 OCT 13

Department of Veterans Affairs

By: 
~~JOSE RIOSAS~~ JOSE D. RIOSAS
CHIEF OF STAFF

Date 12/3/13