#### Department of Veterans Affairs M27-1, Part IV, Chapter 1

**Veterans Benefits Administration September 15, 2017**

**Washington, DC 20420**

#### Transmittal Sheet

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| Changes Included in This Revision | The table below describes the changes included in this revision of Benefits Assistance Service Procedures M27-1, Part IV, Chapter 1, “Quality.”  ***Notes***:   * The term regional office (RO) also includes pension management center (PMC), where appropriate. * Minor editorial changes have also been made to * update incorrect or obsolete hyperlink references * update change date throughout document * update obsolete terminology, where appropriate * reassign alphabetical designations to individual blocks and repaginate, where necessary, to account for new and/or deleted blocks within a topic * correct grammatical and spelling errors * reorganize content within sections for better readability * clarify block labels and/or block text, and * bring the document into conformance with M27-1 standards. |

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| Reason(s) for the Change | Citation | Page(s) |
| * Updated name of program management office from “Quality Assurance Program within Quality Client Services (QCS)” to the “Benefits Assistance Service (BAS) Quality Client Services”. | IV.1.1 | IV-1-15 |
| * Updated activities of the BAS QCS team as follows:   + Removed:     - Personal interview activity     - Requests under the Freedom of Information Act and Privacy Act   + Added:     - Inquiry Routing and Information System (IRIS) electronic correspondence quality reviews     - Site visits for the National Call Centers (NCC), the National Pension Call Center (NPCC), and the National IRIS Response Center (NIRC)     - Quality Review Team (QRT) quality evaluations | IV.1.1.b | IV-1-2 |
| * Removed information concerning the tracking of timeliness of personal interviews. This information will be incorporated in to M27-1, I.3. | IV.1.1.c | IV-1-2 |
| * Removed IV.1.1.d, Freedom of Information Act/Privacy Act, as it is duplicative to existing guidance. | IV.1.1.d |  |
| * Renamed block IV.1.1.e, “Telephone Interview Activity and Correspondence” to “Purpose of the Quality Review Process” to better outline block content. * Added section to outline requirement to develop and maintain a standard operating procedure to address deficiencies that are identified during local and BAS-conducted quality reviews. | IV.1.1.d | IV-1-3 |
| * Renamed IV.1.2, “Telephone Interview Activity” to “Telephone Interview Activity Quality Management Program” to better outline composition of content. | IV.1.2 | IV-1-5-10 |
| * Removed “San Juan Regional Office” from list of regional offices that are required to perform local monthly call reviews for quality purposes. | IV.1.2.b | IV-1-4 |
| * Updated section as follows:   + Updated the number of calls that will be evaluated by BAS QCS each month from 50 to 70   + Removed San Juan Regional Office from the list of regional offices required to perform local monthly call reviews for quality purposes | IV.1.2.c | IV-1-5 |
| * Renamed title of review sheet from “Telephone Quality Assurance Review Sheet” to “QCS Call Quality Scorecard” | IV.1.2.d | IV-1-5 |
| * Updated the Telephone Interview Quality Review Criteria as follows:   + Added:     - Appropriate greeting     - Acknowledgement of the Veteran’s service     - Call closing     - Communication skills   + Renamed:     - “Identification protocol” to “Compliance with FOIA and the Privacy Act”   + Removed:     - Other call event indicators | IV.1.2.e | IV-1-5 |
| * Updated section to include current requirements for evaluating compliance with FOIA/PA observed during a telephone interview | IV.1.2.f | IV-1-6-7 |
| * Updated section to include current requirements for evaluating the technical accuracy of a telephone interview | IV.1.2.g | IV-1-8 |
| * Added section to outline the requirements for evaluating the courtesy and professionalism of a telephone interview | IV.1.2.h | IV-1-9 |
| * Updated section to include:   + Listing of information that is reported to the Office of Performance Analysis & Integrity   + Link to current call quality evaluation guide | IV.1.2.i | IV-1-9 |
| * Updated section to include:   + Data reporting timeframe   + Requirement that call centers must complete local quality trending and analysis to address errors identified during local quality reviews | IV.1.2.j | IV-1-9 |
| * Updated section to include:   + Current requirements for submitting a request for reconsideration   + List of evaluation types for which a call center may request a reconsideration   + Current timeframe for decision on reconsideration requests | IV.1.2.k | IV-1-9-10 |
| * Renamed IV.1.3, “Inquiry Routing and Information System (IRIS) – Electronic Correspondence” to “Inquiry Routing and Information System (IRIS) – Quality Management Process” to better outline composition of content. | IV.1.3 | IV-1-11-12 |
| * Removed IV.1.3.a, Background on IRIS, as it is duplicative to information included in M27-1, V.3. | IV.1.3.a | IV-1-11 |
| * Renamed IV.1.3.b, “IRIS Message Reviews,” to “IRIS Response Reviews.” * Updated block to remove regional office requirements as this information is included in M27-1, V.3. | IV.1.3.a | IV-1-11 |
| * Updated to section to include:   + Listing of information that is reported to the Office of Performance Analysis & Integrity   + Data reporting timeframe | IV.1.3.d | IV-1-11 |
| * Updated section to include requirement that the National IRIS Response Center (NIRC) must complete local quality trending and analysis to address errors identified during local quality reviews. | IV.1.3.e | IV-1-12 |
| * Updated section to include:   + Current requirements for submitting a request for reconsideration   + List of evaluation types for which the NIRC may request a reconsideration   + Current timeframe for decision on reconsideration requests | IV.1.3.f | IV-1-12 |
| * Added content to outline the BAS QCS non-punitive quality program. | IV.1.4 | IV-1-13 |
| * Renamed IV.1.5, “Site Visits” to “NCC, NPCC, and NIRC Site Visits” to better outline composition of content. | IV.1.5 | IV-1-14-15 |
| * Updated section to include current objectives and site visit protocol for NCC, NPCC, and NIRC site visit program. | IV.1.5.b | IV-1-14 |
| * Renamed IV.1.5.c, “Pre-Visit Task List” to “Pre-Visit Preparation” to better outline composition of content. * Updated timeframe for release of site visit letter * Removed specific site visit protocol requirements and included a link to the current site visit protocol | IV.1.5.c | IV-1-14 |
| * Renamed IV.1.5.d, “Post-Visit Task List” to “Post-Visit Requirements” to better outline composition of content. * Updated timeframe for release of site visit report and required recipients * Removed specific post-visit requirements * Incorporated information from IV.1.5.f-h, and rescinded separate blocks of content | IV.1.5.c | IV-1-15 |
| * Rescinded IV.1.5, Systematic Analyses of Operation, as this content is now housed in M27-1, IV.3 |  |  |
| * Rescinded IV.1.6, NCC Management Advisory Council, as this activity is currently suspended |  |  |

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| Rescissions | None |

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| Authority | By Direction of the Acting Under Secretary for Benefits |

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| Signature | /s/  Margarita Devlin  Executive Director  Benefits Assistance Service |
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