

# Separation Health Assessment Exam Guide

## J. Rice Portfolio Sample

### Getting Started

This guide will provide information to help you complete the Separation Health Assessment (SHA) Disability Benefits Questionnaire (DBQ). An SHA exam is provided to service members prior to their separation or retirement from active duty or full-time service, including service in the National Guard, Coast Guard, or Reserve duty. The purpose of an SHA exam is not only to provide a diagnosis for a specific claimed condition but to identify any conditions the Service member may have in the SHA DBQ and provide additional examinations for those potential conditions. As the SHA examiner, you may need to complete additional DBQs not identified on the order request for the Service member within your scope of practice based on the results of your examination. When completing an SHA exam, keep the following in mind:

- Never offer treatment recommendations or speculate if the Service member will be service-connected for an identified condition. If a Service member is asking you questions regarding service connection, please remind them that these decisions are made by the Veteran's Benefits Administration (VBA) and direct them to speak with their VA representative for more information.
- The DBQ worksheet will guide you through the examination. All information relevant to a possible condition identified during the medical record review, the historical review of systems, or the physical exam, should be documented in the SHA DBQ worksheet.
- If available, you must review the form DD-2807-1. The DD-2807-1 is the form Service members use to submit a subjective report of their own medical history prior to separation from service.
- A claims file will be provided for each Service member. The purpose of the claims file review is to familiarize yourself with the Service member's medical history and will aid you in identifying any potential conditions for which the Service member may require additional examinations.
- If the Service member refuses a test or service, the Declination of Services form must be completed, signed, and submitted to Optum Serve. This form is available online in the Knowledge Center.

### Form DD-2807-1

Form DD-2807-1 is the form Service members use to submit a subjective report of their medical history prior to separation from service. Review this document prior to the Service member arriving for their exam so you have an idea of the conditions they may have or have had in the past. Please note that the items identified on the form DD-2807-1 are often self-reported and the Service member may not have a current diagnosis from a medical professional for any of the identified conditions.

### Medical History

#### Review of Systems

In the Review of Systems section of the worksheet, indicate each body system the Service member currently has symptoms for or has had symptoms for in the past. After indicating an impacted body system, document the reported condition, date of onset, details of onset, and course of that condition. If a Service member reports having multiple conditions which impact one body system, you must document each condition separately under the indicated body system. The Service member is entitled to have the appropriate exam/DBQ completed for each identified condition in the Review of Systems section.

### Mental Health Screen

#### Military Sexual Trauma (MST) Disclosure

The Service member you examine during an SHA will soon be leaving active duty service. Generally, it is more difficult to access evidence to support a disability claim for conditions related to MST experiences once an individual has been discharged.

The Service member should be aware, but may not be, of the implications of disclosing MST during the SHA. As previously discussed, the SHA examination report will become part of the Service member's STRs, including any report and documentation of in-service sexual trauma. Moreover, the Department of Defense (DoD) has both unrestricted and restricted reporting processes for sexual assault. If a Service member has already filed a restricted report about a sexual assault and you document the assault in the SHA, the confidentiality of the report may be compromised. If this is the case, he or she should file a claim for their MST-related conditions after separating from the service, rather than disclosing it at the SHA. It is in the Service member's best interest that you point out the information-sharing aspect of the SHA, especially if he or she is reluctant to report MST experiences to a military authority. Even without an MST disclosure, you can be of assistance to all Service members by carefully assessing and documenting all conditions during this examination. If a Service member declines any assessment, it is also important that you document the refusal.

Additional information on handling MST disclosure can be found in the [DMA Military Sexual Trauma](#) course in VHA Train or in the Knowledge Center. Each Service member is provided the VA resource [Information for Service members about Military Sexual Trauma](#) with their appointment information.

## Mental Health Screenings

The SHA exam includes the following mental health screenings:

- PTSD Screen PC-PTSD
- Depression Screen
- Violence/Harm Risk Assessment
- Alcohol Use Screen/Audit-C
- Suicide Risk Assessment

These are basic mental health screening tools and are designed to be administered by the general medical examiner conducting the SHA exam. The DBQ worksheet contains the criteria for a positive screen, and you will be alerted when a screening is positive based on the information entered. If a Service member screens positive on any mental health screening, a separate appointment will be scheduled with a behavioral health specialist. In addition, you must ask the Service member for consent to refer them to the inTransition assistance program. The DoD's inTransition program is a free, voluntary, and confidential program designed to ensure support to active duty Service members, Veterans, National Guard members, and Reservists with psychological health needs as they move between healthcare systems.

If consent is given, call the inTransition program at 800-424-7877. It is preferred by the VA that you perform this referral at the end of the exam with the Service member present.

If consent is not given, provide the Service member with the information to contact the inTransition assistance program and inform them that they can request assistance from the program at any time. The inTransition contact information is also included in each Service member's appointment notification. Additional information on the inTransition program is available at [inTransition | Health.mil](#).

If a Service member screens positive for any suicidal ideation, it must be documented on the Risk Assessment tab. For additional information, review the [Risk Assessment for C&P Exams](#) resource in the Knowledge Center.

## Physical Exam

For SHA exams, each service member will receive a full-body physical examination. During the physical exam, you will evaluate the Service member for any abnormalities in each body system. For any abnormalities identified, you will indicate the appropriate DBQ that must be completed to evaluate the abnormality to determine if a diagnosis for a condition is warranted.

In the physical exam section you must document the Service member's:

- Dominant Hand
- Height

- Weight
- Blood Pressure
- Pulse
- Respiratory Rate

When recording the Service member's blood pressure, three blood pressure readings are required on the day of the exam.

## Visual Acuity

Basic visual acuity testing using a Snellen chart is required. You must perform both distance and near visual acuity testing. When applicable, both uncorrected (without glasses or contact lenses) and corrected (with prescription glasses or contact lenses) visual acuity should be assessed.

Only select the Eye Conditions DBQ on the Additional DBQs tab if an eye condition (eye trauma, disease, etc.) is present. In these circumstances, a full eye exam will be scheduled with an eye specialist. Refractive errors or the use of corrective lenses are not compensable and do not require a specialty exam.

## Abnormal Physical Exam Findings

If any abnormal findings are identified during the physical exam, indicate the body system impacted and provide a description of your findings. On the Additional DBQs tab, indicate the appropriate DBQ(s) to be completed based on the abnormal findings identified.

## Sensitive Exam Considerations

The Service member may decline certain elements of the physical exam based on their sensitive nature. These physical exam elements include:

- Anus and rectum (Hemorrhoids, fistulae, prostate if indicated)
- Genitourinary (Male and female)
- Pelvic and external genitalia (Females only)
- Breast

If a Service member declines any of these examination elements, indicate 'Not Examined/Service member Declined' for the declined element(s). You do not need to complete the Declination of Services form if these exam components are declined.

## Audio Screening

As part of the SHA exam process, each Service member is evaluated for hearing loss and tinnitus. This portion of the exam is conducted by an audiologist and the results are populated into the Audio Screen tab for you. If audio results are not present on the Audio Screen tab, do not submit the SHA DBQ. You will be notified once the audio screening is complete and the results are available.

If any of the hearing thresholds are >25 dB (decibels) at any frequency between 500-8000 Hz in either ear, or any positive response for tinnitus is indicated, the Service member will be scheduled for a full audiological evaluation for hearing loss and tinnitus with an audiologist.

If the Service member claimed hearing loss or tinnitus on the DD-2807-1, you are not required to review the Audio Screen tab. The Service member will be automatically scheduled for a full audiological evaluation with an Audiologist.

## Laboratory Studies

Laboratory studies are not performed as part of the initial SHA exam, but may rarely be needed for conditions indicated by the Service member. In these situations, those laboratory studies should be documented in the identified conditions' corresponding DBQ and on the Lab Studies tab within the SHA DBQ.

## Additional DBQs

On the additional DBQs tab, if you indicated any body systems were impacted by a potential condition in the Medical History (Review of Systems) section, those body systems will be displayed at the top of the page. You must indicate the appropriate DBQ(s) to be completed to evaluate the Service member for these reported conditions. This includes claimed conditions that the Service member reports having a history of, even if they do not report current symptoms.

In addition, any body system identified as having abnormal findings in the Physical Exam section will also display. For each abnormal finding, you must indicate the appropriate DBQ(s) to be completed.

When you indicate additional DBQs to be completed, those DBQs will be added to the Service member's appointment. You are expected to complete only the DBQs that are specific to your specialty. Any DBQs that must be completed by a specialist (Audiology, Optometry, Traumatic Brain Injury, Behavioral Health, or Dental) will be scheduled separately by Optum Serve.

## Diagnosis

In the Diagnosis section, you'll be asked to provide a diagnosis for each of the Service member's claimed or identified conditions. Any conditions the Service member claimed prior to their SHA exam will be prepopulated for you. Any conditions identified during the SHA exam will need to be entered manually. To assist you, all impacted systems identified in the Medical History (Review of Systems) section, and all abnormal findings documented in the Physical Exam section, will display at the top of the tab in separate read-only memo boxes.

For each claimed condition, the appropriate DBQ(s) will need to be completed. Once you have filled out the corresponding DBQs for each claim, the diagnoses will be populated for you in the 'Diagnoses from additional DBQs:' memo box on the SHA DBQ.

For each claimed condition, you will enter the corresponding diagnosis. Although the 'Diagnoses from additional DBQs:' memo box is read-only, you can copy and paste the diagnosis from this location. The diagnosis listed under each claimed condition in the SHA DBQ must match the diagnosis on each of the corresponding DBQs. It is acceptable to report "No Diagnosis" or "Normal".

## Additional Assistance

If you require further assistance, please contact Optum Serve's Clinical Operations staff at (888) 852-1988 ext. 89280.