



USE THIS AS A GAP CHECK, NOT A GUARANTEE
Mark what is already in the file. An unchecked box identifies something to review, not an automatic reason to delay filing.

 Ready  Review

01

FOUNDATION

CONFIRM THE CURRENT DISABILITY

DSM

☐

A current diagnosis is documented
A qualified clinician identifies the mental-health condition under the applicable DSM-5 requirements

☐

The diagnostic history is collected
Include prior diagnoses, changed labels, differential diagnoses, and relevant testing

☐

Current treatment records are included
Therapy, medication, hospital care, crisis care, response, and side effects

☐

Other medical causes or overlapping conditions are addressed
TBI, substance use, sleep disorders, pain, medications, and neurological conditions when relevant

CHECKPOINT: A diagnosis establishes the condition. It does not establish service connection or determine the percentage by itself.

02

LEGAL THEORY

IDENTIFY THE PATHWAY YOU ARE CLAIMING

PATH

☐

DIRECT
The current condition is linked to symptoms, events, injuries, or circumstances during service.

☐

SECONDARY CAUSATION
An already service-connected condition or its treatment caused the mental-health condition.

☐

SECONDARY AGGRAVATION
An already service-connected condition increased the severity of an existing mental-health condition.

☐

TRAUMATIC EVENT
A PTSD, personal-assault, or MST pathway may require specialized stressor or alternative-evidence development.

☐

The claimed pathway is named consistently
Use the same theory in the application, statement, and medical opinion

☐

The timeline supports the selected theory
Reconcile service, onset, diagnoses, treatment, medications, and later changes

03

MEDICAL LINK

MAKE THE NEXUS OPINION ANSWER THE RIGHT QUESTION

LINK

☐

The provider reviewed the relevant history
Service records, treatment, diagnostic changes, lay evidence, and the claimed primary disability

☐

The opinion explains the medical connection
It applies medical reasoning to this veteran's history instead of offering only a conclusion

☐

Causation and aggravation are addressed separately
A negative causation opinion does not answer whether a service-connected condition worsened the disability

☐

Alternative explanations are discussed
Other diagnoses, post-service events, substance use, medical conditions, and medication effects when relevant

☐

The conclusion uses the correct standard
The opinion clearly answers whether the relationship is at least as likely as not

04

IMPAIRMENT EVIDENCE

DOCUMENT WHAT THE CONDITION CHANGES

FILE

☐

Work or school functioning
Attendance, reliability, productivity, concentration, discipline, accommodations, and job loss

☐

Social functioning
Family relationships, friendships, conflict, trust, communication, and isolation

☐

Daily functioning
Self-care, hygiene, meals, finances, transportation, appointments, and routine activities

☐

Personal statement
Specific episodes, frequency, severity, duration, triggers, recovery, and resulting impairment

☐

Family, friend, or coworker statements
Firsthand observations of changes in behavior and functioning

☐

Safety and crisis evidence
Emergency care, hospitalization, safety planning, and need for assistance or supervision

WHOLE-SYMPOM REVIEW: Include listed and unlisted manifestations. Explain how often they occur, how severe they are, how long they last, and what they change.

05

SUBMISSION AND EXAM

REVIEW THE FILE BEFORE IT LEAVES YOUR HANDS

GO

☐

Names, dates, and onset statements are consistent
Explain legitimate differences rather than allowing apparent contradictions to control the analysis

☐

Every referenced private record is attached or obtainable
Do not assume VA already has therapy notes, hospitalization records, or a private opinion

☐

Diagnosis labels and overlapping symptoms are understood
Most overlapping mental-health manifestations are evaluated together under one rating formula

☐

C&P examination preparation is complete
Know the history and describe ordinary functioning honestly without minimizing or maximizing

☐

A prior denial is answered with new and relevant evidence
Address the specific missing element rather than merely resubmitting the same record

FINAL REVIEW

CAN SOMEONE NEW TO THE FILE ANSWER THESE THREE QUESTIONS?

1

WHAT IS THE CURRENT DIAGNOSIS?

2

WHY IS IT CONNECTED TO SERVICE?

3

HOW DOES IT AFFECT WORK AND SOCIAL FUNCTIONING?

If any answer is unclear, that is the part of the record to review.