New VA Onboarding Procedure:

Updates and Emerging Best Practices

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Association of
American Medical Colleges

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Impact of the VA on Health Education and Health Outcomes for the U.S.

70% of the physicians in the U.S. have received training at VA

- >122,000 health professions trainees (HPTs) participated in programs offered through partnerships between 153 VA medical facilities and >1450 academic institutions.
- 95% of the nation's medical schools, including 151 of 159 LCME-accredited allopathic schools and 39 of 42 COCA-accredited osteopathic medical schools, are affiliated with VA.

OFFICIAL 7-YEAR STATISTICS: HEALTH PROFESSIONS TRAINEES (HPTs)*

	2018	2019	2020	2021	2022	2023	2024
Advanced Fellows	652	664	653	634	621	571	523
Associated Health	25,370	24,895	21,215	20,463	22,059	21,496	21,108
Dental Residents and Students	773	732	863	1,012	1,025	1,014	1,002
Physician Residents	45,296	45,363	47,521	48,049	49,940	50,620	51,540
Medical Students	24,643	26,894	26,652	26,271	26,802	29,701	29,439
Nursing Trainees	23,815	25,194	20,771	16,673	17,829	16,718	18,465
Non-Health Profession	341	448	337	204	179	169	128
GRAND TOTAL	**120,890**	**124,190**	**118,012**	**113,306**	**118,455**	**120,289**	**122,205**

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Best Practices and Mitigation Strategies

- **New security clearance process**
- Recommendations
- Maintenance of VA accounts

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New Requirements for Screening Health Professional Trainees (HPTs)

US citizens and
lawful permanent residents in U.S. for >3 years

- Tier 1 background check
- 3-year PIV card (badge)

Non-US Citizens

- FN Federal Records Check
- PIV-I card with 6-month certificates

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VA Citizenship Definitions

Non-US Citizen

Non-US Citizens are required to have a non-US Citizen Check

Definition:

- Foreign born and NOT issued a US Passport and do not have any legal residency status (i.e. individual is not a green card holder, individual does not have alien registration numbers, indivdual is not a DACA recipient)

If in doubt, put "non-citizen" on TQCVL and let VA Personal Security (PerSec) decide.

US Citizen/Lawful Permanent Resident

US Citizens/Lawful Permanent Residents are NOT required to have a non-US Citizen Check

Definition:

- US Citizen or National by birth in the US or US territory/commonwealth or born to US parent(s) in a foreign country
- Naturalized or Derived US citizen
- Lawful Permanent Resident: A person lawfully authorized to live permanently within the United States, i.e issued a "green card"

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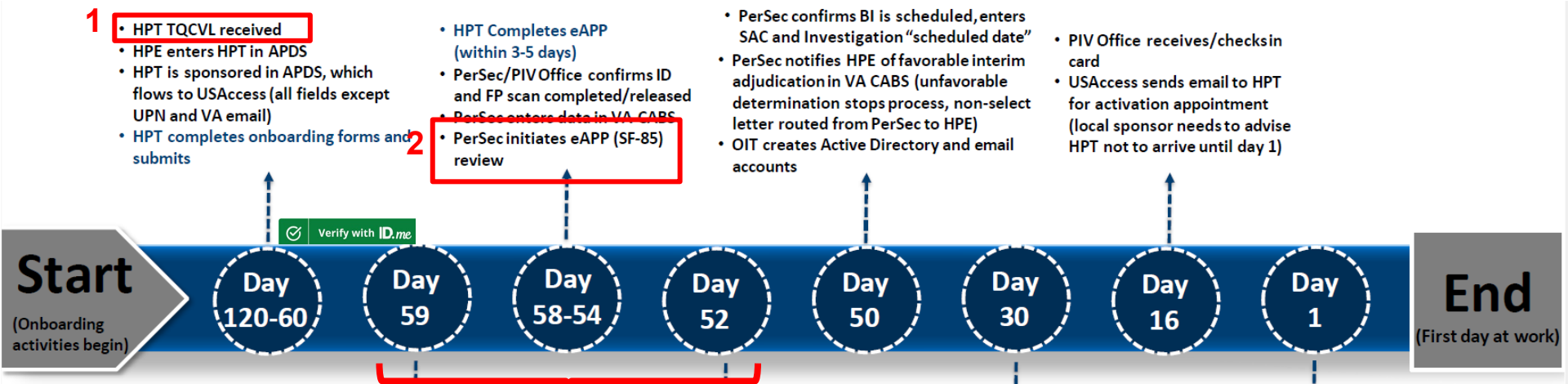
Acronyms

Term	Meaning
APDS	Account Provisioning/Deprovisioning System
BI	Background Investigation
CABS	Centralized Adjudication Background System
DCSA	Defense Counterintelligence and Security Agency
eAPP (SF-85)	Electronic application for non-sensitive position background investigations
FP	Fingerprint
HPE	Health Professions Education Office
HPT	Health Professions Trainee
NBIS	National Background Investigation Services
OIT	Office of Information and Technology
OS	Onboarding Sponsor
PerSec	Personnel Security
PIV	Personal Identity Verification
SAC	Special Agreement Check
TQCVL	Trainee Qualifications and Credentials Verification Letter
USAccess	System that supports PIV credentialing services
USAccess Sponsorship	Person that determines which credential you need and initiates process within USAccess
UPN	User Principal Name (same as VA Email Address)
VA CABS	VA Centralized Adjudication Background System, tool that supports management of suitability vetting

Healthcare Professions Trainee (WOC) Readiness Timeline

SSN required to start this process



- Days on timeline indicate number of days before start date.
- HPT steps are in blue

- HPE notification to PerSec/OS via SharePoint
- PerSec reviews forms
- PerSec initiates NBIS eAPP
- HPT schedules FP scan appointment (Online Scheduler). What to bring: *Source Document Link*

- PerSec FP SAC adjudication and eAPP (SF-85) released to DCSA
- 3 Non-US Citizen vetting validated by PerSec

Automated: Sponsorship is validated, APDS creates the AD account and automates final PIV sponsorship with VA email and UPN.

If selected at Sponsorship, this triggers the Central Print Process (the location of print was specified at initial sponsorship).

- HPT reports to medical facility
- PIV credential is activated (HR completes signing ceremony)

Ideally, process steps identified before day 30 on the map should be done as soon as possible within the 120-day range - this will ensure day 1 readiness.

Courtesy of Dr. Ron Rodriquez

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Foreign National (FN) Federal Records Checks

Cannot be submitted until HPT has SSN – Starts 60 day time to clearance

- Managed by VA Counterintelligence
- Personal identifiable information
- Passport information
- Visa information
- SAC check and fingerprints can be scheduled

VHA
Personnel Security
Intake Form

Fields in Red are Required

		EXAMPLE
Name		Smith, John, Craig
Other Last Names Used		N/A
E-Mail Address		John.Smith@gmail.com
Date of Birth		1/1/1980
Birth Sex		Male
SSN		123-45-6789
Appointment Type		HPT
Citizenship		Non-US Citizen

US Citizens or Green Card Holders do not complete the section below

Country of Citizenship		England
Country of Birth		England
Passport Number		987654321
Passport Issue Country		England
Passport Issue Date		1/1/2020
Passport Expiration Date		1/1/2028
Date of Entry to USA		1/1/2028
Visa Number		8675309
Visa Expiration Date		1/1/2028

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Recommendations for Non-citizens to Obtain SSN

1. Engage with your Office of International Services (OIS) to guide non-citizens on when to obtain a SSN. If attempted too early, this may actually cause a delay.
2. Generally, **11 business days** from the date the J-1 visa holder arrives (I-94 entry date)
3. The below information comes directly from ECFMG's website: https://www.ecfmg.org/evsp/applying-pre-arrival.html

NOTE: SEVIS validation is required to apply for a U.S. Social Security Number (SSN); J-1 physicians must wait 11 business days after being validated in SEVIS before applying for an SSN. Validation status can be confirmed in OASIS. Validated records are marked "active." On the Social Security Card application, at the question about "citizenship," J-1 physicians should select "other."*

After ECFMG validates the record and 10 days has passed since the J-1's arrival in the U.S., they should be good to apply for the SSN. However, if they go earlier, they do run the risk of possible delays.

***Student and Exchange Visitor Information System (SEVIS)**

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Best Practices and Mitigation Strategies

- New security clearance process
- **Recommendations**
- Maintenance of VA accounts

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Institutional and Program Preparation

1. Engage NOW with the DEO/ACOS of Education at your local VA

2. Strongly encourage DEO Office to have weekly meetings with PERSEC

- Common Errors with SF85s – communicated to Affiliate
- Challenges with clearances or incomplete SF85 list (DEO not in process otherwise)

3. Provide efficient and accurate SSN processes to Non-Citizens and convey importance of timely follow-through

- Start process as soon as possible because SSN required to start clearance
- Engage with your Office of International Services on the best time to apply for SSN and a communication plan with non-citizens.
- Plan a **minimum of 60 days from SSN issuance** to start date at VA
- Take this into consideration when building rotation schedules

4. Ensure accurate TQCVL is submitted.

- Highlight non-citizens

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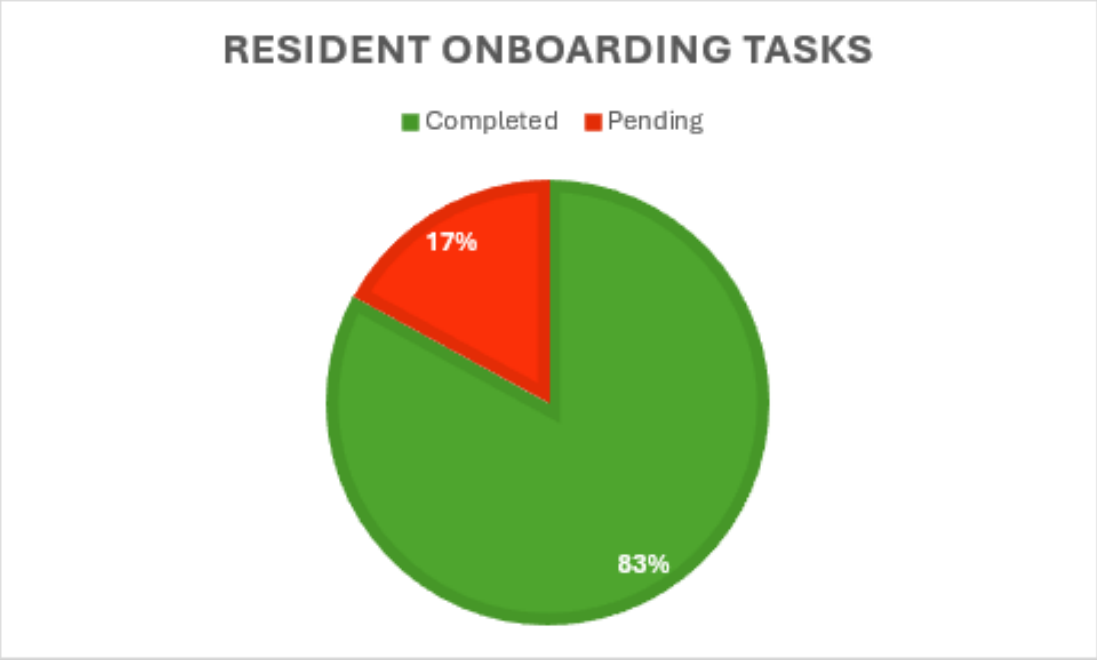
Data from UT Health San Antonio and VISN 17



- **83% (N=199) have completed initial onboarding forms**
  - VA APDS system, MTT, Enrollment Appointment Completed

- **17% not complete, No Action (5%, N=12, No SSN), Form Correction Pending (2%, N=6), Pending Enrollment Appt (7%, N=17), Other**

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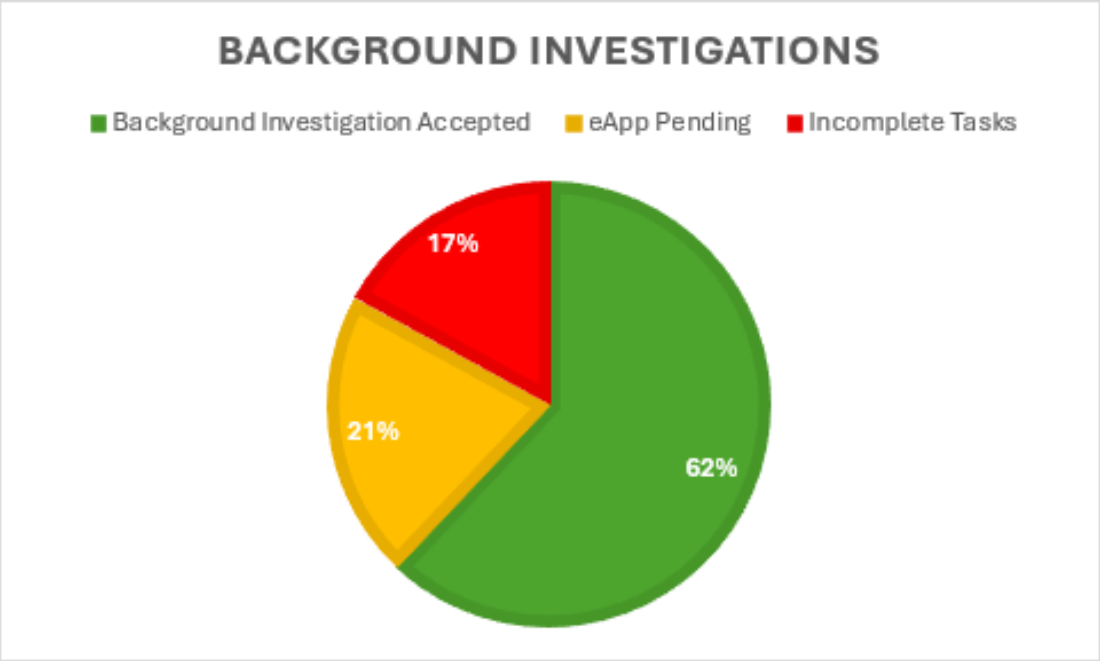
Data from UT Health San Antonio and VISN 17



- **62% (N=154) have been "scheduled," accepted by PerSec in VA**
  - After background check scheduled, onboarding process continues
- **21% (N=51) Tier 1 eAPP pending acceptance**
  - Only 4-5 pending corrections from applicant
- **17% have not completed eAPP**

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NRMP Requirements

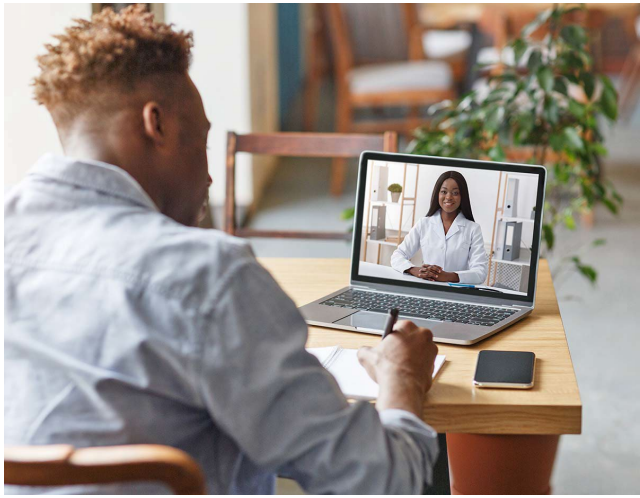
Update Applicant Acknowledgement Processes/Forms

THE MATCH®
NATIONAL RESIDENT MATCHING PROGRAM®

A cornerstone of the NRMP's Match Participation Agreements is the required disclosure of complete, timely, and accurate information. For programs specifically that includes institutional policies regarding eligibility for appointment, such as, but not limited to,

- Expected or required academic, educational, or prior training credentials;
- Pre-employment drug testing and background check; and
- Information relevant to licensure status or visa status.

The Match Participation Agreement mandates that such information be provided to all interviewed applicants prior to the published Rank Order List (ROL) deadline for the Main Match and all fellowship Matches. For applicants, this ensures they have the information necessary to know what each program requires to consider them eligible for training.



https://www.nrmp.org/about/news/2025/03/nrmp-statement-on-match-policy-and-resident-security-and-background-clearance-protocols-for-veterans-affairs/

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Educate Applicants of VA Requirements during Interview Season

Update Applicant Acknowledgement Processes/Forms

- Policies, contracts, benefits, training permits, and requirements to train at your institution and successfully complete all required clinical experiences

- VA is under federal jurisdiction and you must abide by federal law

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Am I Eligible?

Checklist for Health Professions Trainees (HPTs) Training at VA Facilities

The Department of Veterans Affairs (VA) must follow all federal statutes, Equal Employment Opportunity, Affirmative Action policies and approved VA regulations interim and final rulings. The Veterans Health Administration (VHA)/Office of Academic Affiliations (OAA) oversees clinical health professions training programs. To participate in training at a VA, an HPT will receive a not to exceed (NTE), temporary federal appointment. Prior to receiving an appointment, HPTs must meet all federal eligibility requirements. HPTs unable to meet all requirements will not be permitted to train at VA. HPTs will be asked to show documented proof for each eligibility requirement identified below and must maintain eligibility for the duration of the VA appointment.

Met	Requirement	Description of Eligibility Requirement Name:
☐	**US Citizenship or Documented Immigrant, Non-Immigrant or Exchange Visitor**	HPTs who anticipate receiving direct VA-pay (direct VA-paid by bank deposit, VA paycheck) must be citizens of the United States (US). Non-US citizen HPTs will be eligible to receive a without compensation (WOC) appointment if legally able to live and work in the US. Proof will be current immigrant, non-immigrant, or exchange visitor documentation.
☐	**US Social Security Number**	All HPTs must have a US social security number (SSN) prior to beginning the VA pre-employment, onboarding process. Do not fingerprint or complete paperwork until an SSN has been issued. HPTs not eligible to apply for an SSN will not be permitted to train at VA.
☐	**US Selective Service System Registration**	Federal law requires that most males living in the US between the ages of 18 and 26 register with the Selective Service System (SSS). Male, for this purpose, is any individual born male on their birth certificate regardless of current gender. Males required to register, but who fail to do so by their 26th birthday, may be ineligible for VA appointment. Visit https://www.sss.gov to register, print proof of registration or obtain a Status Information Letter.
☐	**Proof of Identity**	Onboarding requires two source identification documents (IDs) to prove identity. Documents must be unexpired and names on both documents must match. For more information visit: OICAM ID Matrix. States have begun issuing Secure Driver's Licenses. Be sure yours will be accepted as a Real ID https://www.dhs.gov/real-id.
☐	**National Practitioner Data Bank (NPDB)**	HPTs who are currently licensed, or who previously held a license in the same or a different discipline, must be screened against the NPDB. Visit the site to perform a self-query and confirm you are eligible for VA appointment. https://www.npdb.hrsa.gov/
☐	**List of Excluded Individuals and Entities (LEIE)**	The Department of Health and Human Services Office of the Inspector General has compiled a list of individuals excluded from participation in Medicare, Medicaid, and all other Federal healthcare programs. Visit the site to confirm you are **NOT** on this list https://exclusions.oig.hhs.gov/.
☐	**Health Requirements**	As a condition of appointment, HPTs must: furnish evidence or a self-certification that they are physically and mentally fit to perform the essential functions of the training program have up-to-date vaccinations for healthcare workers as recommended by the Centers for Disease Control (CDC) https://www.cdc.gov/vaccines-adults/recommended-vaccines/index.html and have undergone baseline tuberculosis (TB) screening and testing per CDC health care personnel guidelines (for direct VA-paid HPTs, this means within 90-days of Offer and Acceptance.) https://www.cdc.gov/tb/topic/testing/healthcareworkers.htm
☐	**Fingerprint Screening and Background Investigation**	HPTs will be fingerprinted and undergo screenings and background investigations. A VA Human Resources Security Specialist will determine suitability. Additional details can be found here: http://www.archives.gov/federal-register/codification/executive-order/10450.html
☐	**VA Onboarding Forms**	Additional pre-employment forms include the: Application for Health Professions Trainees (VA 10-2850D) Declaration for Federal Employment (OF 306) HPT Random Drug Testing Notification and Acknowledgement memo (see below) These documents, and others, are available online for review at https://www.va.gov/oaa/hpt-eligibility.asp. *Falsifying any answer on any Federal document will result in the inability to appoint or immediate dismissal from the VA.*
☐	**Drug-Free Workplace**	HPTs are not drug-tested prior to receiving an appointment; however certain HPTs are subject to random drug testing throughout the entire VA appointment period. HPTs sign an acknowledgement form stating awareness of this practice (see form in the link above).

https://www.va.gov/OAA/docs/Am_I_Eligible_v5.pdf

Required Form for Applicants (Those Interviewed)

Acknowledgement of GME Information [Form 2.1.2.1(a)]

Participating Sites

Failure to be able to rotate at a major teaching location will, in most cases, result in a revocation of an offer to train, termination, or non-renewal of your GME Agreement. (Per NRMP protocol as applicable) Please ensure you meet the eligibility requirements for each training site to include vaccination requirements of each training site.

I understand that if my program has a rotation at South Texas Veteran Health Care System (STVHCS), I have reviewed and will meet the eligibility requirements found at the following sites: https://www.va.gov/OAA/docs/Am_I_Eligible_v5.pdf STVHSC does not offer vaccination accommodations; a separate security clearance is required to train at the VA. Read the following for more on security clearance information: https://www.nrmp.org/wp-content/uploads/2024/11/6-Essential-Questions-Tier-1-Background-Investigation-09.05.24-1.pdf. For NRMP matches, please review the following: https://www.nrmp.org/about/news/2024/11/nrmp-statement-on-match-policy-and-resident-security-and-background-clearance-protocols-for-veterans-affairs/	***Applicant Initials***

https://uthscsa.edu/medicine/sites/medicine/files/2025-03/2.1.2.1.a_ut_acknowledgement_of_gme_information_form_for_gme_applicants.docx_2024-11.pdf

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GME Agreements (contracts)

THE UNIVERSITY OF TEXAS HEALTH SCIENCE CENTER AT SAN ANTONIO
UNIVERSITY HEALTH

GRADUATE MEDICAL EDUCATION AGREEMENT

Ensure GME Contracts/Agreements acknowledge the impact of failing to meet training site requirements (i.e., breach of contract, etc.)

"Resident's appointment tied to:
(a) Meets all eligibility requirements for Sponsoring Institution and each participating facility's training program;"

3.03 The Resident hereby commits to provide quality medical care commensurate with his/her level of training and to be bound by all UT HEALTH SA policies and rules and regulations that relate to his/her activities as a resident.

(a) For initial entry into the program the Resident must satisfy the following requirements:

(7) successful outcome of Veteran's Administration security clearance (if applicable).

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Best Practices and Mitigation Strategies

- New security clearance process
- Recommendations
- **Maintenance of VA accounts**

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Staying Connected
Best Practices to Maintain Accounts

Use remote access to sign in at least every 30 days

- Prepare for VA plans to change the protocol so accounts are deactivated after 30 days of inactivity
- Request remote access through VA (Health Professions Education team and IT)
- Obtain PIV card readers and install Citrix Access Gateway (CAG) for remote access
- Make PIV card readers and CAG readily available
  - Common resident areas (work stations, lounges)
  - Didactics

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Staying Connected
Best Practices to Maintain Accounts

Notifications for Mandatory Training for Trainees status

- Can set supervisor to VA Site Director for alerts of pending expiration
- Work with VA Site Director, Education team, and Training (TMS) managers

VA Site Directors / Affiliate Program Coordinates use a “two-week checklist”

- Account deactivation issues should be solved within 2 weeks
- Check in a minimum of 2-4 weeks ahead of a VA rotation to ensure day-one readiness
- Should strive to log in every 30 days though in case of last-minute coverage

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LOCK your VA Access so you don't lose it!!

Login every 30 days.

Once a year, do your Mandatory Training

Check your account 2 weeks prior to your VA rotation.

Know your PIV expiration date.

REMEMBER: Logging in once every 30 days from either a remote access point or the VA will keep you in the system!

Two Weeks Prior to Rotation or Call Day:

- ☐ Check your expiration date on your PIV badge. If it is within 90 days of expiration, please let the Education Service know by calling us at (XXX) XXX-XXXX. If you don't have a PIV badge, now is the time to let us know as well.
- ☐ Come to the VA or use remote access to try to login with your PIV badge. If your account is disabled, you may need to be at the VA to troubleshoot.
- ☐ Make sure you've done your mandatory training refresher course.
- ☐ Refer to the link – Health Professions Trainees – How to Connect at VA (QR code) [Replace with your site's info/QR]. This document addresses common reasons for accounts to become inactive, including delinquent training. **Most issues can be solved by calling the Help Desk at (855) 673-4357.**
  1. **Ask for your account to be activated.**
  2. **Request that all dis-user flags be removed.**
  3. **Request a PIV exemption (if you don't have a PIV badge).**
- ☐ After you login, if you are still having issues with Microsoft apps (Teams, Outlook), you will need to place a YourIT Ticket. The easiest way to do this is to go to the Microsoft Edge browser while you're logged in to the VA → VA Bookmarks Folder (Top Left) → National → O365 License Request. It will populate a YourIT ticket with your information. Press "Order Now" to resolve the issue.
- ☐ Our office can help with remote access. [The Education Service provides card readers to all resident physicians upon request. – facility dependent*]

Usually once your account is enabled, you **only have 24 hours to login** without having to call the Help Desk again.

HOW TO GET & STAY CONNECTED AT THE VA

Delinquent mandatory TMS training?

- Ensure your TMS training is completed before the due date. Delinquent training will cause your accounts to be disabled. **Training must be completed ANNUALLY.**
- Check your TMS training at VA TMS 2.0 from **any device**. The only training you're required to complete is the **Mandatory Training for Trainees (MTT) or the Refresher course.**
- Once training is complete, call the ENTERPRISE SERVICE DESK (ESD) at 855-673-4357, opt 2 to enable your account if disabled.

Did you complete your initial CPRS/VISTA login within 30 days of receiving access codes?

- Users must log in within 30 days (**preferably 21 days**) of receiving access codes or your accounts will become dis-usered.
- If you did not initially log in, please contact the ESD at 855-673-4357, opt 2 to have your account reactivated and any dis-usered flags removed.

Has it been a while since you've last logged into the VA network?

- Users must log into the VA Network every 30 days or your accounts will be disabled; call ESD at 855-673-4357, opt 2 to re-activate your accounts. For Microsoft applications, including TEAMS, go to Microsoft Office 365 - VA ServicePortal v2 on a VA computer to request access, push "order now." It should be resolved within an hour.

Need Remote Access?

- You must request access from a VA computer; please go to [facility-specific link or guidance] for Remote Access Instructions
- PIV card readers and computers are available in the [facility-specific/dependent]

Is your PIV expiring soon or need a PIV exemption?

- Please get with our office 90 days prior to the expiration date for renewal.
- If you are awaiting a PIV badge pick up appt and require access, call the ESD at 855-673-4357, opt 2 to request a PIV exemption

For questions or assistance, call a VA HPT Specialist at (XXX) XXX-XXXX or email the team at [facility-specific email].

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VA Office of Academic Affiliations (OAA) Resources

Resources for HPTs – Eligibility and Forms

https://www.va.gov/oaa/hpt-eligibility.asp

VA Affiliate Resources

https://www.va.gov/oaa/affiliation-agreements.asp

- VHA Directives Library (1400 series - disbursement agreements, educational cost contracts, supervision)
- VHA Handbooks Library
- TQCVL letter, list and guide
- Educational Activity Records (EARs)
- Information about the enhanced security protocol

VA Help Desk: 855-673-4357

- This an expedited line for HPT access only.
- HPTs should press 4 to skip the normal call menu. It will not be an announced option on the call.

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Group on Resident Affairs (GRA)

The Group on Resident Affairs (GRA)

Resources

VA Health Enhanced Security Processes

- Journey Map Health Professions Trainee Academic Affiliate Day 1 Readiness
- AAMC OAA Onboarding Letter to Stakeholders
- VA Enhanced Security Briefings
- When to Conduct a Non-US Citizen Check
- Six Essential Questions for VHA Tier 1 Background Investigation/Foreign National Vetting
- Information for Academic Affiliates VA Enhanced Security Posture
- Common eAPP Errors and Mistakes - Section Guide

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DISCUSSION

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