

Post Service Officer Training

102nd Convention June 16, 2022

Agenda



- Post Service Officer
 - Duties and Obligations
 - Roles and Responsibilities
- Accreditation
- Best Ways You Can Help
- VA Form 21-22
- VA Form 21-0966
- Ways A Veteran can get rated
- VA Math

Duties and Obligations



Post Service Officers

- Per Section 218(a)(12) of <u>VFW Manual of Procedure Post Officers</u> shall:
 - Assist members of the Post, their surviving spouses and orphans and other worthy cases brought to their attention in obtaining rightful entitlements from federal and state governments.
 - Be performed in accordance with the instructions contained in the <u>VFW Guide for Service Officers</u> under the general supervision of the Department Service Officer.
 - The Service Officer shall perform such other duties as may be incident to the office and as may from time to time be required by the laws and usages of this organization or lawful orders from proper authority.

District Service Officers

- Per Section 418(a)(14) shall:
 - Assist Post Service Officers.

Role of the Post Service Officer?



- PSOs are local ambassadors of the Veterans of Foreign Wars; each VFW Post has an appointed PSO.
 - Post Service Officers (PSOs) are local advocates who assist veterans and their loved ones in navigating a complicated benefits landscape.
 - Post Service Officers serve as a conduit to critical programs and services in the community, but they are not accredited by the Department of Veterans Affairs for the purposes of representing claimants in their benefit claims before VA.
- Know the VA eligibility rules established by law.
- Provide veterans and survivors basic knowledge about VA benefits.
- Advise veterans to submit all forms to the <u>DSO or a VFW accredited</u> representative for completion.
- Keep Post Members, Veterans, and survivors aware of events, news, and information relevant to local, state, and federal Veteran services and benefits.

Role of the Post Service Officer



- Read and understand <u>VFW Post Service Officer Responsibilities</u> and Code of Conduct for VFW Representatives
- PSOs <u>DO NOT</u> hold legal standing to represent claimants in their benefit claims before the Department of Veterans Affairs.
 - This distinction is reserved for individuals accredited by VA through the Veterans of Foreign Wars of the U.S. in accordance with Title 38 U.S.C. § 5902 - Recognition of representatives of organizations and the VFW National Veterans Service Policy & Procedure.

Authorized Capabilities Breakdown



Action	PSO	DSO/Accredited VSO
Help the veteran/claimant complete forms	X	X
Provide advice/guidance concerning VA benefits	X	X
Provide advice/guidance and assist with obtaining state or local benefits	X	X
Sign VA Form 21-22		X
Represent Claimants at VA hearings		X
Accept/Submit PII and VA Forms		X
Sign forms on behalf of claimant		X

Post Service Officer Don'ts



• DON'T:

- Request or accept payment or any other form of compensation for the advice/assistance provided
- Take possession of or release a claimant's personal information to anyone other than the DSO, accredited VSO, or the claimant
- Identify yourself as an accredited representative
- Initiate or participate in unprofessional conduct in the workplace or in public view
- Attempt to represent claimants before the VA in any capacity such as signing forms on behalf of or representing claimants during VA hearings etc.
- Refuse service to claimants unless the claim is clearly fraudulent or there is unprofessional conduct by the claimant
- DO NOT promise anything

Post Service Officers Do's



• **DO**'s:

- Provide guidance to claimants and assist them in obtaining state and local benefits.
- Provide guidance and refer claimants to the DSO or accredited VSO for assistance with obtaining VA benefits.
- Conduct yourself in a professional manner.
- Prepare the veteran for the process.
- Always use black ink when completing forms.
- Attend PSO training.

Accreditation



- The VA accredits three types of representatives: Veteran Service Organizations, Attorneys and Agents
 - Must have good moral character and be capable of providing competent representation.
 - Accredited individuals are professional advocates that have completed extensive training in veteran's benefits and have access to resources that non-accredited individuals do not.
 - VA's Office of General Counsel (OGC) is responsible for making those determinations through its accreditation process.
- VA accreditation allows organizations and/or individuals the authority to represent veterans before the Department of Veterans Affairs
 - If you are not accredited, VA will not disclose any information to you about other veterans

Who Can Represent A Veteran



- Accredited Representative of a Veteran Service Organization
 - All Department Service Officers, Assistant Department Service Officers,
 & Claims Consultants that work for the VFW are accredited.
 - The VFW is not allowed to charge a fee to the Veteran
- Accredited Attorneys or Agents
 - May legally charge fees for appeals if a valid fee agreement is filed with VA.
 - May only charge claimants a fee after:
 - VA has made a decision regarding the claim;
 - An appeal of that decision has been initiated
 - The attorney or agent has filed a power of attorney and a fee agreement with VA.

Who Can Represent A Veteran



- Non-licensed Individual
 - The representation is for a one-time, one-claim basis only.

Claim Sharks



- Claim Sharks are:
 - Non-accredited organizations who engage in predatory practices.
 - Many times, illegally charging for services and may lack the qualifications required for VA accreditation.
- Many unaccredited individuals and unrecognized organizations advertise online, and some may contact veterans directly.
- The terms "veteran" and/or "military" does not inherently mean the organization represents the best interests of veterans and their families.
- Refer these organization to DSO.

How to Know if Someone is Accredited VETERANS DE FOREIGN WARS.

A searchable list of accredited VSO representatives, agents, and attorneys is available at the VA Office of General Council's website:

http://www.va.gov/ogc/apps/accreditation/index.asp

Confidentiality of Records



- Public Law 93-579, The Privacy Act of 1974, requires written authorization for release of any information from records maintained by Federal agencies. The Department of Veterans Affairs, Department of Defense, Social Security Administration, and other Federal agencies restrict the release of confidential information, such as address of the claimant, etc. to parties other than the claimant.
- An accredited representative of a Veterans Service Organization may release information necessary for development of a specific claim to a local service officer, but only if authorized by the claimant in writing on VA Form 21-0845, Authorization to Disclose Personal Information to a Third Party. This authorization must include the PSO's full name and does not transfer to other individuals.

Evidence Needed for Claims



- What can you do to assist the veteran and DSO in submitting a substantially complete claim?
 - Inform the veteran of the evidence required for their claim(s)
- Depending on the benefit sought, ask the veteran to gather and submit:
 - Service Treatment Records/Service records/DD-214
 - Private medical records or Names, Address and Dates of Treatment for each condition
 - Marriage certificates/divorce decrees
 - Birth Certificates and Social Security cards for dependent children
 - Financial statements

How You Can Best Serve Veterans and Help the DSO



- Identify if Veteran is ready to complete claim or need more time.
- If the Veteran is ready
 - Complete VA Form 21-22
 - Either collect documents and send to DSO, accredited VSO, or have Veteran send them in.
- If Veteran needs more time
 - Help Veteran Identify what documents are required for claim
 - Complete VA Form 21-0966

VA Form 21-22 - General



- Appointment of Veterans Service Organization as Claimant's Representative
 - Designates the Veterans of Foreign Wars as the individual's representative.
 - Required to authorize the VFW to represent a claimant for benefits from the Department of Veterans Affairs.
- Under no circumstances is a fee or compensation of any nature to be charged to anyone for service rendered in connection with any claim for which the VFW provides representation.
- Membership in the VFW is not required for representation.

VA Form 21-22 – Who We Represent



- Any Veteran other than those with a Dishonorable Discharge.
- If a veteran has both a dishonorable discharge and an honorable period of service, we may still be able to represent them refer these veterans to your DSO.
- Once representation is accepted by the VFW, the veteran may not be represented by any other accredited organization or attorney.
- IMPORTANT: VA form 21-22 must be completed and signed by an accredited VFW representative to be valid for VA benefit purposes.

VA Form 21-22 – Questions to Ask



- Prior to completing a VA Form 21-22, ask the Veteran these questions to ensure that we are able to represent him or her.
 - Do you currently have representation with another Veteran Service Organization or attorney?
 - Do you have any open claims or appeals in process?
- If the Veteran doesn't know, please contact the DSO or an accredited VSO prior to completing and sending in the form.

VA Form 21-22 – Section I



Department of Veterans Affairs		VA DATE STAMP (DO NOT WRITE IN THIS SPACE)
	NS SERVICE ORGANIZATION REPRESENTATIVE	
IMPORTANT: Please read the Privacy Act and Rescompleting the form.	pondent Burden Information on Page 3 before	
	ith your claim instead of a veterans service organization, re. See Page 4 for information on how to submit the complable at www.va.gov/vaforms .	
\$	SECTION I: VETERAN'S INFORMATION	
NOTE: You can either complete the form online or by hand. If	completed by hand, print the information requested in ink, neatly	, and legibly to expedite processing of the for
1. VETERAN'S NAME (First, Middle Initial, Last) JOHN	ATESTCASE	
2. VETERAN'S SOCIAL SECURITY NUMBER (SSN)	3. VA FILE NUMBER (If applicable) 4. VETE	RAN'S DATE OF BIRTH
0 0 0 - 0 0 - 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 1	- 0 1 - 1 9 3
5. VETERAN'S SERVICE NUMBER (If applicable)	6. INSURANCE NUMBER(S) (If applicable) (Include letter pre	fix)
7. VETERAN'S MAILING ADDRESS (Number and street or rural	ll route, P.O. Box, City, State, ZIP Code and Country)	
No. & Street 1 4 2 8 E L M S	TREET	
Apt./Unit Number City	S P R I N G W O O D	
State/Province O H Country U S	ZIP Code/Postal Code 4 3 2 3 1 -	

VA Form 21-22 – Section II & III



SECTION II:	CLAIMANT'S INFORMATION (If other than v	veteran)							
10. CLAIMANT'S NAME (First, Middle Initial, Last)		\\							
JILL	BTESTCASE								
11. CLAIMANT'S MAILING ADDRESS (Number and street or r	ural route, P.O. Box, City, State, ZIP Code and Country)								
No. & Street 1 4 2 8 E L M 5	TREET								
Apt./Unit Number City	S P R I N G W O O D								
State/Province O H Country U S	ZIP Code/Postal Code 4 3 2 3 1								
12. CLAIMANT'S TELEPHONE NUMBER (Include Area Code,	13. CLAIMANT'S EMAIL ADDRESS (Optional)	14. RELATIONSHIP TO VETERAN							
253-206-5061	JILLB@TESTCASE.COM	SPOUSE							
SECTIO	N III: SERVICE ORGANIZATION INFORMAT	ION							
 NAME OF SERVICE ORGANIZATION RECOGN organization) 	ZED BY THE DEPARTMENT OF VETERANS AFFA	AIRS (See list on Page 3 before selecting							
VETERANS OF FOREIGN WARS (097)									
16A. NAME OF OFFICIAL REPRESENTATIVE ACTI ORGANIZATION NAMED IN ITEM 15 (This is an and does not indicate the designation of only this spe organization)	appointment of the entire organization	TITLE OF PERSON NAMED IN ITEM 16A							
17. EMAIL ADDRESS OF THE ORGANIZATION NAI	MED IN ITEM 15 18. DATE	OF THIS APPOINTMENT (MM/DD/YYYY)							

VA Form 21-22 – Section IV



VETERAN'S SOCIAL SECURITY NUMBER 0 0 0 - 0 0 - 0 0 0 SECTION IV: AUTHORIZATION INFORMATION 19. AUTHORIZATION FOR REPRESENTATIVE'S ACCESS TO RECORDS PROTECTED BY SECTION 7332, TITLE 38, U.S.C. - By checking the box below I authorize VA to disclose to the service organization named on this appointment form any records that may be in my file relating to treatment for drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV), or sickle cell anemia. X I authorize the VA facility having custody of my VA claimant records to disclose to the service organization named in Item 15 all treatment records relating to drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV), or sickle cell anemia. Redisclosure of these records by my service organization representative, other than to VA or the Court of Appeals for Veterans Claims, is not authorized without my further written consent. This authorization will remain in effect until the earlier of the following events: (1) I revoke this authorization by filing a written revocation with VA; or (2) I revoke the appointment of the service organization named in Item 15, either by explicit revocation or the appointment of another representative. 20. LIMITATION OF CONSENT- I authorize disclosure of records related to treatment for all conditions listed in Item 19 except: DRUG ABUSE INFECTION WITH THE HUMAN IMMUNODEFICIENCY VIRUS (HIV) ALCOHOLISM OR ALCOHOL ABUSE SICKLE CELL ANEMIA 21. AUTHORIZATION TO CHANGE CLAIMANT'S ADDRESS - By checking the box below, I authorize the organization named in Item 15 to act on my behalf to change my address in my VA records. X I authorize any official representative of the organization named in Item 15 to act on my behalf to change my address in my VA records. This authorization does not extend to any other organization without my further written consent. This authorization will remain in effect until the earlier of the following events: (1) I file a written revocation with VA; or (2) I appoint another representative, or (3) I have been determined unable to manage my financial affairs and the individual or organization named in Item 16A is not my appointed fiduciary. I, the claimant named in Items 1 or 10, hereby appoint the service organization named in Item 15 as my representative to prepare, present and prosecute my claim(s) for any and all benefits from the Department of Veterans Affairs (VA) based on the service of the veteran named in Item 1. I authorize VA to release any and all of my records, to include disclosure of my Federal tax information (other than as provided in Items 19 and 20), to my appointed service organization. I understand that my appointed representative will not charge any fee or compensation for service rendered pursuant to this appointment. I understand that the service organization I have appointed as my representative may revoke this appointment at any time, subject to 38 CFR 20.6. Additionally, in some cases a veteran's income is developed because a match with the Internal Revenue Service necessitated income verification. In such cases, the assignment of the service organization as the veteran's representative is valid for only five years from the date the claimant signs this form for purposes restricted to the verification match. Signed and accepted subject to the foregoing conditions.

VA Form 21-22 – Section V



	NOTE: THIS POWER OF ATTOR	NEY DOES NOT F	REQUIRE EXECUTION BEF	ORE A NOTARY PUBLIC
22A. SIGNA	ATURE OF VETERAN OR CLAIMANT (Do	No Print)	<u>, </u>	22B. DATE SIGNED (MM/DD/YYYY)
3A. SICHA		IZATION REPRESEN	NTATIVE NAMED IN ITEM 16A	5-15-202.2 23B. DATE SIGNED (MM/DD/YYYY)
reparatio	s long as this appointment is in effect, n, presentation and prosecution of you n thereof. COPY OF VA FORM 21-22 SENT TO:			

VA Form 21-0966



- Why is this form important?
 - If a veteran wants to file a claim but needs additional time to gather the information needed to file, an Intent to File form should be used.
 - VA stopped accepting Informal Claims on March 24, 2015 and now they must complete an Intent to File on a <u>VA Form 21-0966</u>.
 - VA may grant entitlement to benefits from an effective date prior to the date of claim (DOC) as long as the claimant submits a complete claim within one year of the date VA received the ITF.
 - An ITF is specific to the benefit sought. When the claim received is not for the same type of benefit identified on the ITF, the ITF may not be applied to the claim for purposes of effective date assignment.

VA Form 21-0966 – Section I



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VA Form 21-0966 – Section II & III



SECTION II: GENERAL BENEFIT ELI	ECTION
IMPORTANT: VA may not be able to use this form to establish an effective date for benefits if you do not 13. I intend to file for the general benefit(s) checked below: (Choose all that apply)	t select one or more of the general benefits listed below.
NOTE: Only check the box below if you are a surviving dependent of the veteran.	
SURVIVORS PENSION AND/OR DEPENDENCY AND INDEMNITY COMPENSATION (DIC)	
IMPORTANT : After receiving this form, VA will give you the appropriate application to file for the VA disability compensation online at www.va.gov . If you give VA a completed application for form, your completed application will be considered filed as of the date of receipt of this form general benefit that is received after you file this form will be considered filed as of the date of more than one general benefit on this form or you may submit a separate intent to file for each II as possible. VA cannot process this form if we cannot identify the claimant and veteran.	r the selected general benefit within <u>one</u> year of filing this m. Only the <u>first</u> completed application for each selected receipt of this form. You may indicate your intent to file for
SECTION III: DECLARATION OF IN	TENT
By filing this form, I hereby indicate my intent to apply for one or more general acknowledge that: (1) this is not a claim for benefits ; (2) I must file a complete apply will process my claim; and (3) a complete application for the same general benefit(some year of the date VA receives this form for my application to be considered filed as	lication for each general benefit with VA before VA) as indicated on this form must be received within
14A. SIGNATURE OF CLAIMANT/AUTHORIZED REPRESENTATIVE	14B. DATE SIGNED (MM,DD,YYYY) 5-15-20-22
IS NAME OF ATTORNEY, AGENT, OR VETERANS SERVICE ORGANIZATION (Please Print)	3-13-2022
(NOTE: This form may only be completed by a Veterans Service Organization, attorney, or agent if a valid po	ower of attorney has been completed.)
PRIVACY ACT NOTICE: VA will not disclose information collected on this form to any source other than what has been authorized under the	Privacy Act of 1974 or Title 38. Code of Federal Regulations 1 576 for multipe uses (i.e.
civil or criminal law enforcement, congressional communications, epidemiological or research studies, the collection of money owed to the United S	현실하는 마음이 그리고 있는 것이 없는데 마음이 이 분들이 되었다. 이 경우 사람이 되었다면 하는데 보다 되었다. 그리고 있는데 그리고 있는데 그리고 있다면 하는데 없는데, 그리고 하는데 그리고 있는데,
VA programs and delivery of benefits, verification of identity and status, and personnel administration) as identified in the VA system of records, 5	그 마다 사람이 아니는 사람들이 살아야 하는데
Records - VA, published in the Federal Register. Your obligation to respond is required only to preserve a date of claim for an application that is identify if you have a claim file and to ensure that your records are properly associated with your claim file. VA will not deny an individual benefit	그렇게 하는 사람들이 되었다.

Ways VA Can Grant Service Connection



- Service connection for a disability or death can be established in many ways.
 - Direct Service Connection
 - Presumptive
 - Aggravation
 - Secondary
 - Aggravation of non-service-connected disability
 - "As if"

Direct Service Connection



- Evidence is in the service records and the three elements below are met
 - A current disability
 - An event, injury, or disease in service, and
 - A link or nexus establishing that the current disability had its onset or inception in service, which may be established by evidence of
 - chronicity and continuity, or
 - continuous symptoms or a medical nexus opinion.

Reference: 38 CFR 3.303 and M21-1 Section V.ii.2.A.

Presumptive Service Connection



- VA presumes that certain disabilities were caused by military service it the Veteran meets a certain criteria.
 - Relaxes the burden on the Veteran to prove that disability is related to service.
 - Congress and VA have decided that service-connected compensation should be awarded for a number of diseases which appear after service for all veterans that meet certain conditions of service, even if there is no record of an event or disability in their particular military service records.
 - Diseases or conditions subject to presumptive service connection (SC) will be considered to have been incurred in or aggravated by service if manifested to a compensable level within the time frame specified for that certain disease under the regulation, even if there is no evidence of such disease during service.
- Reference: 38 CFR 3.307 and M21-1 Section V.ii.2.B.

Aggravation of preservice disability.



- Disability is not caused by military service, but is made worse by military service or by a service-connected disability
 - Preexisting condition is worsened, beyond natural progression, by a service-connected condition.

• Reference: 38 CFR 3.306 and M21-1 Section V.ii.2.C.

Secondary Service Connection and Aggravation of Non-Service-Connected (NSC) Disabilities



- Service-connected condition causes another rated disability
 - Secondary Service Connection
 - Service-connected disability causes another disability
 - Non-Service-Connected Disability
 - Rating a non-service-connected condition requires a medical professional to establish baseline – severity of condition if service-connected condition wasn't making it worse.
 - The Veteran will be compensated for the difference between the baseline and current severity

• Reference: 38 CFR 3.310 and M21-1 Section V.ii.2.D.

"As If" Service Connected



- Veteran can receive compensation but may not be eligible for all ancillary benefits that normally come along with service-connected disability.
 - Paired Organs
 - Service-connected disability (usually loss of or loss of use) of certain organs and extremities and
 - Non-service-connected disability of the paired organ or extremity (hand, feet, eyes, ears, kidney and lungs.)
 - Both organs or extremities will be treated as service connected for determining serviceconnection
 - Compensated Work Therapy or Rehabilitation
 - If Veteran is participating in program and suffers an additional disability
 - VA Fault or Negligence (1151 claim)
 - Medical malpractice claim when the Veteran suffer an additional disability or death and it was not reasonably foreseeable and is due to negligent VA medical care.
 - A medical opinion is required that states it was not reasonably foreseeable and is due to negligence of the VA
- Reference: 38 CFR 3.383 and M21-1 Section VIII.iv.7.A. And 38CFR 3.361 under 38 U.S.C. 1151

Compensation – VA Math Concept



VA does not add disability ratings together, rather they combine the disabilities using the combined ratings table

To help understand the concept of VA Math, think of a sale:

- A shirt costs \$100 regular price
- The store advertises 50% off The new price is \$50
- The store offers a coupon for an additional 50% New price is \$25 you save 75% total
- Why? Because you take the additional percentage from what's left of the original price
- The veteran is the original price, the disabilities are the sale, and the total saved is the combined rating
- Combined Rating Table

- 50% for Sleep Apnea
- 30% for PTSD
- 20% for Lumbar Spine
- 10% for Tinnitus
- 100% 50% = 50% • 50% * 30% = 15%
- 50% + 15% = 65% • 35% * 20% = 7%
- 7% + 65% = 72%28% * 10% = 2.8%
- 72% + 2.8 = 74.8%
- Rating is 80%

QUESTIONS?



- Contact Information:
 - Mel West, <u>melvin.west@va.gov</u>, 253-344-5985 / 206-341-8284





VA FORMS

Get all the VA Forms you want or need at:

VA Forms



COMMONLY USED VA FORMS OVERVIEW:

VA FORM 21-22 - Appointment of Veterans Service Organization

VA FORM 21-0966 - Intent to File

VA FORM 21-4142 - Authorization & Consent to Release Information to the DVA

VA FORM 21-4142a - General Release for Medical Provider Information to the DVA

VA FORM 21-526EZ - Application for Disability Compensation

VA FORM 21-527EZ - Application for Pension

VA FORM 21-534EZ - Application for DIC, Death Pension, and/or Accrued Benefits

VA FORM 21-530 - Application for Burial Benefits

VA FORM 21-4138 - Statement in Support of Claim

VA FORM 21-2680 - Exam for Housebound or Permanent Need For Aid and Attendance

VA FORM 21-0781 - Statement in Support of Claim for PTSD

VA FORM 21-0781a - Statement in Support of Claim for PTSD Secondary to Personal Assault

VA Forms



COMMONLY USED VA FORMS OVERVIEW:

VA FORM 21-686c - Declaration of Status of Dependents

VA FORM 21-674 - Request for Approval of School Attendance

VA FORM 10-182 - Decision Review Request: Board Appeal (Notice Of Disagreement)

VA FORM 20-0995 - Decision Review Request: Supplemental Claim

VA FORM 20-0996 - Decision Review Request: Higher-Level Review

VA FORM 10-10ez - Application for Health Benefits

VA FORM 40-10007 - Application for Pre-Need Determination of Eligibility for Burial in a VA National Cemetery

Links



National VFW Resources

- VFW Guide for Post Service Officers
- Post Service Officer Info and Training

State VFW Resources

- Previous DSO Post Service Officer
 Training
- Accredited Service Officer Locations and Contact Info
- VFW Service Division Resource
 Page

VA Resources

- eCFR Title 38
- KnowVA M21-1VA Procedure
 Manual
- Eligibility for VA disability benefits
- Eligibility for VA health care
- Eligibility for Veterans
 Pension
- Eligibility requirements for VA home loan programs

VA Benefits and Services



The Department of Veterans Affairs offers a wide variety of benefits and services to veterans and their families including:

- Compensation
- Pension
- Healthcare
- Education
- Home Loan Guarantee
- Life Insurance
- Survivors benefits
- Burial benefits

Fact Sheets for many VA benefits can be found at:

https://benefits.va.gov/BENEFITS/factsheets.asp