Post Service Officer Training
Agenda

• Veteran Service Officer (VSO) definition and what they do
• Post Service Officer (PSO) definition and what they do
• VA Forms, Submission & Samples (21-0966, 21-22 & 21-2680)
• VA Benefits/ Service Connection & Compensation
• Code of Conduct for PSO, “12 Rules To Live By”
• Resources for helping Veterans
• Important Reminders
What is a Veteran Service Officer?

• VA accredited employees of the VFW Department of Pacific Areas

• Referred to as VSO, Claims Consultant, Department Service Officer (DSO), or Assistant Department Service Officer (ADSO)

• Accredited means they have access to VA systems to help veterans with their claims
Veteran Service Officer Duties

• Reviews decisions and advocates for the veteran and veteran’s family

• Meets with the veteran and assists with collecting evidence

• Answers request for assistance

• Represent veterans at VA hearings
VFW Regional Office Locations

• VFW VSO offices are located inside VA Regional Offices: Office contact information at vfwpacific.org
• Go to “Resources” tab
• Click on “Veterans Benefits & Assistance”
What are Post Service Officers?

• Post Service Officers (PSOs) are volunteers in their VFW Posts who help veterans in their local communities
• VFW Posts are the first place many members, veterans, and survivors turn to for assistance
• As a PSO, you share information about veterans’ benefits to local communities. (Ex: community centers, nursing homes, places of worship, Veterans Centers, and other community places.)
• Assists veterans and their survivors begin the process of receiving the help they are entitled to/need
Post Service Officer Responsibilities

• Know VA eligibility rules by established law
• Provide council to Veterans and survivors
• Help Veterans and survivors complete VA forms and direct submission to local office for completion. (DO NOT take possession of any documents, assist and review forms and supporting documents.)
• Stay informed to share knowledge about services offered (Ref: VSO, events, news, info pertaining to local, state, and federal veteran services.)
Why are PSOs so important?

- Knowledge of local benefits and resources
- Housing
- Employment
- Disaster Assistance
- Health Care
A PSO’s responsibilities with claims

• Assist and review the veteran’s claim documents and supporting evidence. (Examples on next slide)

• Must NOT take possession of ANY documents under any circumstance.

• Direct veteran to submit all documents to their respective VFW Regional Office.
VFW Guide for Post Service Officers

• VFW Manual of Procedure Section 218(a)(12) states in part, “The work of a Service Officer shall be performed in accordance with the instructions contained in the VFW Guide for Service Officers under the general supervision of the Department Service Officer.”
• Purchase a copy from the VFW Store: www.vfwstore.org
VA Form 21-22

• Appointment of Veterans Service Organization as Claimants Representative
• Also known as the Power of Attorney (POA) form.* This is necessary for the veteran to get help from the VFW with filing a claim.
• The veteran is giving the VA permission to give VSOs access to the veteran’s information through the VA system.
• Under NO circumstance should any fee or compensation of any nature be charged to anyone for services or representation in connection with any claim with the VFW.

*Note: “POA” is only the word used by the VA to refer to the Veteran Service Organization that has access to the veteran’s file. It does NOT give the VSO access or permissions to any of the veterans private, non-VA related documents or information.
VA Form 21-22
Appointment of Veteran Service Organization as as Claimant's Representative (Page 1)

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
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<td>SURVIVING SPOUSE INFORMATION HERE</td>
<td>LEAVE BLANK VA REGIONAL OFFICE WILL FILL THIS PORTION</td>
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VA Form 21-22
Appointment of Veteran Service Organization as
as Claimant's Representative (Page 1)

SECTION IV: AUTHORIZATION INFORMATION

18. AUTHORIZATION FOR REPRESENTATIVES ACCESS TO RECORDS PROTECTED BY SECTION 732, 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 aids or aids-related conditions.

☐ 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 aids or aids-related conditions. Radiographic and x-ray records by any service organization representative, other than VA, 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 as named in Item 15, either by explicit revocation or the appointment of another representative.

20. LIMITATION OF CONSENT - I authorize the release of information related to treatment for conditions listed in Item 19 except:

☐ DRUG ABUSE
☐ ALCOHOLISM
☐ ALCOHOL ABUSE
☐ INFECTION WITH THE HUMAN IMMUNODEFICIENCY VIRUS (HIV)
☐ AIDS
☐ AIDS-RELATED CONDITIONS

BOX MUST BE CHECKED

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.

☐ 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) if 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 2, 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 services 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 28.6. Additionally, in some cases a veteran's income is developed because a match with the Internal Revenue Service (IRS) tax information. 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.

SECTION V: SIGNATURES

NOTE: THIS POWER OF ATTORNEY DOES NOT REQUIRE EXECUTION BEFORE A NOTARY PUBLIC.

22A. SIGNATURE OF VETERAN OR CLAIMANT (see footnote)

10/16/2021

22B. SIGNATURE OF VETERANS SERVICE ORGANIZATION REPRESENTATIVE NAMED IN ITEM 16A (see footnote)

10/16/2021

NOTE: As long as this appointment is in effect, the organization named herein will be recognized as the sole representative for preparation, presentation, and prosecution of your claim before the Department of Veterans Affairs in connection with your claim or any portion thereof.

VA USE ONLY

COPY OF VA FORM 21-22 SENT TO
☐ MY FILE
☐ EDI FILE

DATE SENT

ACKNOWLEDGED (YES)

REVOKED (Reason and date)

PENALTY: The law provides several penalties which include fine or imprisonment, or both, for the willful submission of any statement of material fact, knowing it to be false or for the fraudulent acceptance of any payments to which you are not entitled.
VA Form 21-0966 Intent to File

- Protects the veteran’s effective date for receiving benefits.
- Sent to VFW Regional Office immediately by the veteran via mail, fax, or online (electronic upload).
- Form lets the VA know the veteran plans to submit a claim.
- Applies only to new claims (never claimed or rating increase)
- VA allows 1 year from the date the form was received for the veteran or claimant to submit their claim packet.
VA Form 21-0966 – Cont.

• The VA give claimants a 1-year period for evidence gathering.
• Supporting evidence means:
• Medical documents- private medical records, doctor’s letters, diagnoses.
• Military documents- medical records, DD214, ships’ logbooks, etc.
• Other pertinent proof- marriage certificate, death certificate, invoices of medical out-of-pocket expenses, “buddy letters”
VA Form 21-0966 – Cont.
• Ways that Veterans and Claimants can submit a VA 21-0966:
  1. In person- Preferred method, have Veteran fill out VA 21-0966 form and submit to the VSO at the VFW Regional Office via email/fax.
  2. Call the VA directly- call 1-800-827-1000, verbal “Intent to File” via VA Representative. Do this if the veteran/claimant did not bring a DD-214, marriage, or veteran death certificate when they first contacted you
  3. Online/ eBenefits- log in online and begin the process of filing a claim, DO NOT complete the claim. Saving the incomplete claim will trigger an “Intent to File” date.
https://www.ebenefits.va.gov/ebenefits/
VA 21-0966

Intent to File Form

NO ONE DOES MORE FOR VETERANS.

SAMPLE

VA 21-0966

VETERAN OR SURVIVING SPOUSE SIGN
VA Form 21-2680 Aid & Attendance or Housebound

• Needs another person to help perform daily activities like eating, bathing, dressing, etc.

• Is bedridden or spends a significant amount of time in bed due to illness.

• In a nursing home due to physical or mental disability.

• Limited vision= 5/200 or less in both eyes; concentric contraction of visual field to 5 degrees or less despite using corrective lenses.

• Housebound-spends majority of time home due to a permanent disability.
CLAIMANT MUST FILL THIS PORTION

STOP SECTION III & PAGE 2 AND 3 IS FILLED OUT BY DOCTOR
Service-Connection and Compensation

- Service-Connection and Compensation
- 0% = Service Connection the veteran's disability is rated 0%, they receive free medical/mental health treatment at a VA facility, hospital or clinic. No compensation is paid, because the disability is considered minor.
- 10% or more = Compensation payments are given monthly if a veteran is disabled due to military service.
Non-Service-Connected Pension

- Non-Service-Connected Pension

- Age 65 or older, if under 65, are permanently 100% disabled, have limited or no income.

- Active duty time-in-service requirements with at least 1 day served during wartime.

- Seriously disabled veterans may qualify for Aid and Attendance (A&A) benefits.
VA Healthcare Benefits & Services

- Hospital, outpatient medical, dental, pharmacy and prosthetic services
- Domiciliary, nursing home and community base residential care
- Mental health treatment (inpatient and outpatient)
- Specialized health care for women veterans (includes prenatal care)
- Health and rehabilitation programs for homeless Veterans
- Readjustment counseling– Vet Centers (for Combat and MST only)
- Alcohol and drug dependency treatment
- Registries - Medical evaluation for disorders related to service in the Gulf Wars (Desert Shield/Storm, Iraq, Afghanistan, Kuwait). exposure to Agent Orange, burn pits, radiation, and other environmental hazards.
Education Benefits

- VA administers education benefits for active duty troops, veterans, reservists, and qualifying dependents.

- Post 9/11 GI Bill (Chapter 33) and Montgomery GI Bill (Chapter 30) for active duty veterans.

- MGIB Selected Reserve (Section 1606) for Reservists.

- Dependents Educational Assistance (Chapter 35) for dependents.

- For more info visit: http://explore.va.gov/education-training
Veteran Readiness and Employment (VR&E)

• Commonly referred to or known as “Voc Rehab”

• Purpose is to aid Veterans with service-connected disabilities to prepare for, obtain, and maintain suitable employment, by providing job training, employment accommodations, resume development, and job seeking skills.

• For more info visit: http://www.benefits.va.gov/vocrehab/
VA Home Loans

- Several VA home loan services are available to eligible veterans, some military personnel, and certain surviving spouses (DIC).

- Types of VA loans:
  
  - Guaranteed Loans
  
  - Purchase or Refinance
  
  - Special Grants

- For more info visit: https://www.benefits.va.gov/homeloans/
Life Insurance

• Service-Disabled Veterans Insurance (SDVI)

• For Veterans with service-connected disabilities. Veterans must apply within 2 years of getting service connected for any new disability.

• Veterans Group Life Insurance (VGLI)

• Renewable term life insurance for veterans who want to convert their SGLI up to an amount not to exceed the coverage they had when separated from service. Must apply within a year & a half from their discharge date.

• For more info visit:
  https://www.va.gov/life-insurance/options-eligibility/
Dependency and Indemnity Compensation (DIC)

- Payable to certain survivors of:
- Veterans whose deaths were caused by service-connected illness or injury. This includes disabilities that can be proven to be service-connected. In other words, Vet did not have to be receiving disability benefits before death (i.e. AO exposure presumptive).
- Veterans who were 100% P&T. One of the qualifying factors must be met:
  1. 10 yrs. before their death; or,
  2. Released from active duty for at least 5 yrs. before death; or,
  3. At least 1yr before their death, was a prisoner of war who died after Sept. 30, 1999
- Service-members who died on active duty, active duty for training, or inactive-duty training.
- For more info visit:
Survivors Pension

- Widow who has not remarried; OR
- Unmarried child under 18, permanently disabled before 18, or Age 18-23 and enrolled in an approved educational institution
- Meets low income and net worth requirements
- May qualify for Aid and Attendance (A&A) benefits even if they don’t meet Pension income requirements

For the Survivor to qualify for Pension, the Deceased veteran must have:
- Other than dishonorable military discharge, AND
- Served the minimum time requirement on active duty, with at least 1 day served during an eligible war time period
Death Benefits (VA National Cemetery Administration)

- Burial Benefits - VA burial benefits can help service members, Veterans, and their family members plan and pay for a burial or memorial service in a VA national cemetery.
- Headstones and Markers - VA can provide a monument to mark the grave of an eligible veteran.
- Presidential Memorial Certificate - A Presidential Memorial Certificate (PMC) is a certificate signed by the President of the United States. It is given to honor the memory of a Veteran in recognition of their military service. Note: Vet must have an Honorable discharge to qualify.
- VBA Burial Benefits- Reimbursement for some funeral costs
- For more info visit: https://www.va.gov/burials-memorials/
Code of Conduct for Post Service Officers
“The 12 VFW Rules to Live By”
Code of Conduct for Post Service Officers

1. Will perform their duties under the supervision of the Department Service Officer (DSO) and their respective VFW Regional Office.

2. Shall assist members of the Post, their widows and orphans and other Veterans in obtaining rightful benefits from the federal and state governments.

3. Will never release confidential information, such as what conditions were claimed or address of the claimant, etc. to parties other than the claimant or VFW accredited representatives.
Code of Conduct for Post Service Officers

4. Should keep members informed of Veterans’ entitlements and benefits offered and administered by federal, state, and local governments.

5. Assist Veterans and survivors free of charge; under no circumstances, shall they request, demand or accept cash or any other form of payment for such assistance, etc.

6. Shall not refuse to assist any Veteran or survivor unless the claimant is considered fraudulent. Shall not refuse to assist any Veteran or survivor because they do not feel the Veteran or survivor is eligible for the benefit sought. The VFW Regional Office will make the final decision as to whether the VFW will provide representation in all cases.
Code of Conduct for Post Service Officers

7. Inform the veterans (preferably in writing) that all application forms, evidence, etc., in connection with claims should be submitted to the Department Service Officer. Since VA Awards benefits are based on the date of the claim, it is vital the claims be sent to the VFW Regional Office IMMEDIATELY upon receipt.

8. Shall NOT keep original documents provided to them in connection with claims. The claimant will transmit copies to the DSO/ VFW Regional Office who will submit them to the VA on their behalf.

9. Shall refrain from the use of racial, religious, age related, sexual or ethnic epithets, innuendos, slurs or jokes in the workplace.
Code of Conduct for Post Service Officers

10. Must conduct themselves in a professional manner and refrain from sexual advances, verbal or physical conduct of a sexual nature, or request for sexual favors.

11. Should have access to current VA forms. Contact your VFW Regional Office or DSO if forms are not available in your office or visit https://www.va.gov/find-forms/

12. Should attend all Post Service Officer Training
Resource Links

- VA Healthcare:
  http://www.va.gov/healthbenefits/apply/veterans.asp
- Access VA Benefits & Healthcare: www.VA.gov
- eBenefits:
  https://www.ebenefits.va.gov/ebenefits/homepage
- VFW Service Offices:
- Note: must be connected to a printer when making the request
Important Reminders!

• NEVER hold on to any veteran’s documents (copies or originals)
• Don’t sign VA 21-22 – the form will be signed at the Regional Office by DSO
• Ensure veterans submit docs to the VFW Regional Office
• Submit form 21-0966 immediately to establish an effective date – even if the veteran or claimant doesn’t have DD-214, Marriage or Death Certificate
• Stay Informed
• Refer to DSOs with any questions you may have – contact information is found in vfwpacific.org website
• Alternative VA Contact and Information Sheet provided in your training packet
• Get current VA Forms and Information at https://www.va.gov/ or https://www.vfw.org/