



# Overview of Claims Process

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 2016 Annual Fall Training Conference




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## Overview

- Starting the Claims Process
- Applicable Applications
- Assisting in Development
- Additional Forms
- Medical Evidence
- Follow up
- Decision Letter Review
- Additional Actions




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## Starting the Claim

- What is the Veteran or Spouse Requesting
- Is the Claim Warranted for the Claimant
- Compensation or Pension
- Should an Informal Claim be Initiated
- Does Claimant have the required documentation
- Power of Representation
- List of documents the Claimant will obtain
- Which Application are we going to use?




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Applicable Application

**Compensation**

- 21-526EZ
- 21-526c - Pre-discharge Compensation Claim
- 21-526b - Supplemental Claim for Compensation
- 21-534EZ - DIC

**Pension**

- 21-527EZ - Veteran
- 21-534EZ – Surviving Spouse/Dependents




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Assisting in Development

- Does the evidence support the claim?
- Is a nexus needed?
- For compensation, date of claim verse occurrence.
- What documents might the claimant need assistance in acquiring?
- Does the claim qualify for ACE.
- Is the claim new, increase, secondary or presumptive and **what do we claim?**




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Additional Forms

- Disability Benefits Questionnaires
- Individual Unemployability Application 21-8940
- 21-4192 – Employment Information
- 21-4142 – Medical Release Form
- Care Expense Statement
- 21-0779 – Nursing Home Info
- 21-2680 – Housebound A&A




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### Medical Evidence

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**Compensation**

- STR's or Applicable Portions
- Appropriate Disability Benefits Questionnaire (DBQ)
- Current Private Medical Records and/or VHA Records
- Nexus Letter
- How do you list the disability on the Application
- Acceptable Clinical Evidence (ACE)

**Pension**

- Death Certificate for Surviving Spouse
- 21-2680 Housebound/A&A
- Medical Records if Death Certificate is not Specific




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### Follow up

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- Out of Sight out of Mind?
- VBMS review
- Did the VA send a Duty to Assist Letter?
- Was the claim Traditional or Made Traditional?
- Is there reply requested? What do you send?
- Did you give a reasonable time for re-visit?
- Was a decision letter received?




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### Decision Letter Review

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- Claimant Satisfied with Outcome
- Explanation of Benefits
- Additional Benefits
- Notice of Disagreement
- Appeal
- File for Increase
- What do you encourage or discourage




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### Additional Actions

- What do you encourage or discourage?
- CHAMPVA
- Educational Benefits
- Commissary/BX Privileges
- Tax Letter – New Tax Letter
- VA Health Care Enrollment
- Anything the Claimant is Warranted by Law




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### Summary

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### Scenario 1

Veteran of the 1<sup>st</sup> Gulf War wants to file for a condition of his right knee.

- He brings his service medical records to your office.
- You identify he is currently service connected at 20% overall for tinnitus, hearing loss, and his left knee for minor instability.
- You note two comments in the STR's about being seen for right knee pain, but no diagnosis of the condition.
  - What is your first consideration you should make in assisting with development of this claim?
  - Do you file?
  - What documentation do you send?




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### Scenario 2

Surviving Spouse comes to your office to apply for Pension Benefits with A&A.

- Upon identifying the benefit sought, you note on the DD-214 presented the Veteran served after Korea and before Vietnam Era with no other dates of active duty service noted.
  - What options do you have?
  - Are you obligated to file a Pension Claim for the Surviving Spouse?
  - What documentation do you send to VBA?




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### Scenario 3

A Vietnam Veteran with proven boots on the ground comes in to file for fibromyalgia due to his Agent Orange exposure in the Republic of Vietnam.

- The Veteran is currently 90% overall for Ischemic Heart Disease and Diabetes Type II.
- The goal he provided you is to obtain a rating of 100%, regardless of how it's accomplished.
- What do you file for?
- Do you file for anything?
  - What actions do you request the Veteran attempt to reach his personal goal of 100% disability compensation?
  - What forms will you use?




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### Real Life Examples

- At this time I ask anyone in the audience to provide any real life examples that may be helpful in educating the audience of how you handled a claim and the success of that claim process.
- Continue until time is exhausted – no more than five minutes per example.




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Questions ?

The slide features a white background with a black border. At the top right, there is a logo for 'UNIVERSITY OF GUELPH' with a stylized 'U' and 'G' emblem. At the bottom left, there is a small inset image of a building. The text 'Questions ?' is centered on the slide.

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