

Compensation & NSC Pension Checklist

This checklist will take you through 4 steps to filing a claim for benefits with the VA. This checklist will be most helpful for compensation and pension claims. Claims for education benefits, insurance products and home loans may not fit this checklist.

Step 1: Consult With Your County Veterans Service Officer (CVSO)

Talk with your CVSO about the service-connected disability or illness incurred while on active duty for which you are considering filing a claim. You or a family member can discuss with the CVSO eligibility for a nonservice-connected pension. If, as a result of your discussion with the CVSO, the claim appears warranted, go to:

Step 2: Collect Documentation.

Following is a list of documents and information you will probably need as part of a claim for VA benefits. Even if you cannot obtain all of the information right away, you should still submit your claim.

Gather the following documents to support your claim:

- i Service medical records
- i Private physician's records
- i Applicable photographs
- i DD Form 214
- i Marriage certificate
- i Divorce papers or death certificate for all prior marriages of either the veteran or spouse/widow(er)

- i Birth certificates of children for all children being claimed as dependents (includes children in school between 18 & 23, helpless children of any age, and all children under 18- whether natural, adopted, or step children)

- i Copies of dependents' Social Security cards
- i Buddy statements or letters home during service that supports your claim.
- i **Pension Income** data for each family member:
 - () Social Security award letter (or exact amount of check/payment)
 - () Interest statements or account books from banks, credit union, etc.
 - () Amount of company or union pension benefits before any deductions
 - () Unemployment benefits (including dates for first and last checks)
 - () Sick pay or disability pay including Workman's Compensation (also provide dates for first and last checks)
 - () Life insurance proceeds
 - () Earnings from employment
 - () Net income from business operation or rental income (may be asked to show expenses and gross income information)
 - () Amount of SSI benefits awarded
 - () FIA (Department of Social Services) assistance (includes ADC and General Assistance)
 - () Any other income source (e.g., Land Contract, Savings Bonds, Stocks, Money Certificates, IRAs, 401-Ks, Royalties, trusts, etc.)

- i Current value of savings accounts, real estate (excluding home), or non-essential personal property

Step 3: Contact Your CVSO, Again.

Discuss with the service officer your findings and what more, if anything, needs to be done to document your claim.

Step 4: Make an appointment with your CVSO to file your claim. Take the evidence that you gathered with you to your appointment. The more prepared you are the easier the process will be. If you have all of your evidence you can file a **Fully Developed Claim**, which is faster than the traditional claims process.

- i **NOTE:** All documents (especially DD-214) should be either originals or certified copies, if possible. A claim may be filed without all of the required documents; however, all of the above information relevant to the claim will be needed before a decision can be made on your claim. Claims received without full information may take longer to process or be denied until the information is received. Claims based on non-service-connected disability or death generally require active duty during a recognized wartime period.

- i **Dependency information:** Certain benefits pay at a higher rate if you have a spouse and/or dependent children (or parents).