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March 31, 2014

WDVA Bulletin No. 1005

TO: County Veterans Service Offices

SUBJECT: Updated Accreditation Policy – AD-119

The policy, "Accreditation Procedures for Claims Officers and County Veteran Service Officers is attached.

The policy is reviewed annually and the new policy includes changes made in the WDVA curriculum, VA training requirements for remote computer access and new policies for CVSO capability in relation to the VA paperless claim initiative.

POC for the bulletin is Kim T. Michalowski or Colin Overstreet in the Milwaukee Claims Office.

Wisconsin Department of Veterans Affairs

Accreditation Procedures for Claims Officers and County Veteran Service Officers

Date of Origin: August 10, 2007	No.: AD-119
Last Revision: March 4, 2014	Page 1 of 3
Last Review: March 4, 2014	Maintained By: Bureau of Claims

Applies To:

- Claims Officers
- County Veterans Service Officers

Purpose:

The purpose of this policy is to provide guidelines for the Wisconsin Department of Veterans Affairs (WDVA) accreditation of Claims Officers and County Veterans Service Officers (CVSO) in the preparation, presentation and prosecution of claims before the United States Department of Veterans Affairs (VA). This policy will be administered through the WDVA Bureau of Claims and is established in accordance with [38 Code of Federal Regulations \(CFR\) 14.629](#). This policy will be reviewed for applicability and adequacy on a yearly basis.

Policy:

1. Accreditation Requirements

- a. Accreditation of claims officers of the WDVA will include 32 hours of instruction and training in the following areas:
 - i. Brief history of the VA to include basic organizational structure
 - ii. Code of Ethics for service officers
 - iii. Data privacy
 - iv. An introduction to VA Claims Management Systems
 - v. Claims development and processing procedures related to:
 - 1) Disability compensation
 - 2) Pensions
 - 3) Education
 - 4) Home loans
 - 5) Life insurance
 - 6) Vocational rehabilitation
 - 7) Survivor's benefits
 - 8) Burial benefits
 - 9) Appeals process
 - 10) Miscellaneous benefits
- b. Acceptable passing of testing administered during accreditation training with a grade of 70% on each of three phased tests.

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2. Requisite knowledge is gained through the successful completion of the following:

- a. WDVA Claims Office accreditation training consisting of 32 hours of instruction and passing of three phased tests
- b. VA Training, Responsibility, Involvement & Preparation of Claims (TRIP); training is online effective April 2008 ([see Procedure 1e below for signup process](#))
- c. VA Cyber Security training and test conducted on a yearly basis (online through the VA Training Management System. [See Procedure 1e below for signup process.](#))
- d. VA Federal Tax Information training (online through the VA Training Management System)
- e. Organizational mentoring program

3. Completion of the National Association of County Veterans Service Officer's Certification Training Course is an acceptable substitute for 2a above.

Procedure:

1. VA Recognition Procedures:

- a. Complete 2a through 2d above or 2b, 2c, 2d and 3 above in substitution.
- b. Submit a completed VA Form 21 (Section I) for the accreditation candidate to have Section II completed by WDVA to:

WDVA Claims Office
c/o VA Regional Office
5400 W. National Ave., Room 157
Milwaukee, WI 53214

- c. WDVA will forward the signed VA Form 21 to:

Department of Veterans Affairs
Office of General Counsel (022A)
810 Vermont Avenue NW
Washington, DC 20420

Fax: (202) 273-6404

- d. After taking action on the VA Form 21, the VA will return an appointment letter and a representative ID card to WDVA for signature by the Secretary. Once the signed card is received by the representative, WDVA accreditation is technically complete.
- e. Enrollment in TRIP and Cyber Security training allows read-only access to VA computer systems. The first step for this action is to complete the accreditation steps above.
- f. It is best to complete the Cyber Security Training prior to attending WDVA accreditation training. It is also recommended to have already completed TRIP training. The individual desiring this training can send an email to WDVA to start the process. The WDVA contact is Colin Overstreet at colin.overstreet@va.gov. A telephone and fax number must be provided. If accreditation training has already been completed, please enclose a copy of both sides of the accreditation card.

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2. Limits of Accreditation

- a. CVSO's must process all client related information (i.e., correspondence, forms, etc.) through the WDVA Claims Office for review prior to submission to VA.
- b. CVSO's may not prepare appellate briefs (VA Form 646) on behalf of clientele.
- c. CVSO's may not represent WDVA clientele before administrative hearing personnel and/or panels (i.e., DRO, VARO, BVA, COWC, etc.).
- d. CVSO's may not accept POA status in the Stakeholders Enterprise Portal (SEP) or ratings in the Veterans Benefits Management System (VBMS), on behalf of the WDVA.

3. Termination of Accreditation

- a. WDVA may request cancellation of accreditation for a claims officer or a CVSO when any requirement of [38 CFR 14.629](#) is no longer met. The VA may also move to cancel accreditation when it becomes aware of non-compliance with applicable laws and regulations as outlined in [38 CFR 14.633](#).
- b. A request for cancellation shall be made when the representative (claims officer or CVSO) is no longer a paid employee of the department or of the respective county and/or is no longer working at least 1,000 hours annually. In cases of the resignation or the termination of a WDVA employee, the individual will immediately be prohibited further access to equipment and files maintained by WDVA in support of its claims representation activities.

Requests for cancellation of accreditation will be signed by the Secretary or his/her designee and will be forwarded to:

Mr. David R. McLenachen (022D)
Deputy Assistant General Counsel
Office of the General Counsel
Department of Veterans Affairs
810 Vermont Avenue NW
Washington, DC 20420