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**STATE OF WISCONSIN
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October 8, 2014

WDVA Bulletin No. 1018

TO: County Veterans Service Offices

SUBJECT: Revised AD 119, Accreditation Procedures for Claims Officers and County Veterans Service Officers

As the US Department of Veterans Affairs (VA) has moved to electronic claims and the CVSO community is required to obtain a PIV card for accessing the VA records systems, and those systems are now becoming the electronic claims file for the veteran; it is imperative that all Claims Officers and CVSOs and their staff to maintain the annual training requirements for Privacy and Information Security and Federal Tax Information.

The protection of a veteran and/or claimants private information contained in his/her VA claims file is one of the paramount responsibilities of a VA recognized Power-of-Attorney. It is vitally important that agents accredited to conduct business on behalf of the WDVA as the accrediting authority have completed and maintain the VA training requirements necessary for accessing the various VA applications for claims submission, processing and review.

To that end, in conjunction with the Accreditation and Training Coordinator for the WI CVSO Association; the attached AD 119 has been revised to tie in the completion of these courses to not only attaining accreditation with WDVA, but also retaining that accreditation.

Particular attention should be paid to the addition of a new Section 3, which details the suspension and/or termination of accreditation if a WDVA Claims Officer, CVSO or accredited representative in the CVSO office fails to comply with the annual requirement for VA Privacy and Information Security and Federal Tax Information.

The WDVA wants to ensure that all privacy laws are complied with and the privacy of a veteran and any VA claimant is maintained and honored.

Any questions on this policy should be directed to Kim T. Michalowski, Director, Bureau of Claims.

Wisconsin Department of Veterans Affairs

Accreditation Procedures for Claims Officers and County Veteran Service Officers

Date of Origin: August 10, 2007	No.: AD-119
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Applies To:

- WDVA 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.

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) must be completed prior to accreditation. Training is online effective April 2008 ([see Procedure 1e below for signup process](#)).

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- c. VA Privacy and Information Security training and test must be completed on a yearly basis (online through the VA Training Management System) ([see Procedure 1e below for signup process](#)).
- d. Rules of Behavior certification must be completed on a yearly basis.
- e. VA Federal Tax Information training must be completed on a yearly basis (online through the VA Training Management System).
- f. 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 thru 2e above or 3 above in substitution of 2a.
- b. Submit a completed VA Form 21 (Section I) for the accreditation candidate to the Secretary, WDVA for signature (Section II).
- 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, VA Privacy and Information Security, Rules of Behavior and VA Federal Tax Information 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 VA Privacy and Information Security, Rules of Behavior and VA Federal Tax Information 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.

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.

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- 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. Suspension of Accredited Representatives VA Computer or Remote Access

- a. Information security and the protection of veteran/claimant personal identifying information is a critical aspect of the Claims Officer and CVSO duties and accreditation.
- b. VA requires VA Privacy and Information Security Awareness Rules of Behavior certification and Federal Tax Information training must be completed by all systems users annually.
- c. Claims Officers and CVSOs that fail to complete these annual requirements will have their VA computer or remote computer access suspended; until such time the training and certification is completed.
- d. Claims Officers and CVSOs that fail to complete the required training within 90 days of their annual completion date will have WDVA accreditation revoked; and WDVA will notify all other Veteran Service Organizations of the reasons for this action.
- e. Claims Officers and CVSOs must obtain a VA PIV card within 180 days of accreditation; or their access to all VA computer systems will be suspended.

4. 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