**Standardized Forms Policy Change**

*Veterans Service Organization Toolkit*

We need your help. In order to increase participation and overall education of Veterans regarding the updated regulation to require the use of standardized claim and appeal forms we need the assistance of our Veterans Service Organizations and Veterans Advocacy Groups. We designed this material to be helpful to your team as you engage your membership through your many communications channels and for their own use within their local groups. All of the following material can be attributed to the Department of Veterans Affairs, Veterans Benefits Administration. For more information, please contact your [nearest regional benefits office](http://www.benefits.va.gov/benefits/offices.asp).

**Article for Online Publication (Blogs/Website text/etc.):**

**Short (~265 words):**

The Department of Veterans Affairs (VA) now requires the use of standard claim and appeal forms to make it as fast and easy as possible for Veterans and survivors to file applications for benefits and receive timely and accurate decisions on their claims. This change brings VA processes in line with other government agency processes, such as those of the Social Security Administration and the Internal Revenue Service, which also require submissions on standard forms before they can pay benefits or issue refunds.

There are two claim actions that now require standard forms – applications for Veterans and survivors’ disability compensation or pension, and notices of disagreement to initiate appeals of compensation claim decisions. Veterans or survivors who filed their claim prior to March 24, 2015, do not need to refile using a standard form. The easiest and fastest way for Veterans to submit an application for compensation is online through the eBenefits ([www.ebenefits.va.gov](file:///C%3A%5CUsers%5Cospctrom%5CAppData%5CLocal%5CMicrosoft%5CWindows%5CTemporary%20Internet%20Files%5CContent.Outlook%5C8IUT5213%5Cwww.ebenefits.va.gov)) portal. Veterans and survivors are also encouraged to seek the assistance of a Veterans Service Organization in filing their claim through the Stakeholder Enterprise Portal. Veterans who are unable to submit their compensation application electronically can mail them to [their Claims Intake Center](http://www.benefits.va.gov/compensation/mailingaddresses.asp). Completed forms for pension and survivors’ benefits should be mailed to the [nearest regional office](http://www.benefits.va.gov/benefits/offices.asp).

A new *intent to file* process has also been established for applicants who need additional time to gather all of the information and evidence needed to support their claim. Applicants may notify VA of their intent to file a claim in order to establish the earliest possible effective date for benefits if they are determined eligible.

For more information on which forms to use, or how to notify VA of your intent to file a claim, visit <http://explore.va.gov/file-claim>.

**Long (~436 words):**

Starting March 24, 2015, the Department of Veterans Affairs (VA) requires the use of standard claim and appeal forms when applying for disability compensation, pension, and survivor benefits. VA wants to make it as fast and easy as possible for Veterans and their survivors to file applications for benefits and receive timely and accurate decisions on their claims. Using the standard forms, Veterans and survivors can clearly identify the benefit they are seeking and provide the information necessary for VA to start processing their claim or appeal.

This change brings VA processes in line with other government agency processes, such as those of the Social Security Administration and the Internal Revenue Service, which also require submissions on standard forms before they can pay benefits or issue refunds.

The quickest and easiest way to complete and submit an application for disability compensation is electronically via the eBenefits (ebenefits.va.gov). Veterans and survivors are encouraged to seek the assistance of a Veterans Service Organization in filing their claim through the Stakeholder Enterprise Portal (sep.va.gov).

Veterans who are unable to submit an electronic application for disability benefits must now use [VA Form 21-526EZ,](http://www.vba.va.gov/pubs/forms/VBA-21-526EZ-ARE.pdf) *Application for Disability Compensation and Related Compensation Benefits*. Wartime Veterans filing for needs-based pension must use [VA Form 21-527EZ,](http://www.vba.va.gov/pubs/forms/VBA-21-527EZ-ARE.pdf) *Application for Pension*. Survivors filing a claim for dependency and indemnity compensation (DIC), survivor’s pension, and accrued benefits must complete [VA Form 21-534EZ](http://www.vba.va.gov/pubs/forms/VBA-21-534EZ-ARE.pdf), *Application for DIC, Death Pension, and/or Accrued Benefits*. These forms are not new, and were previously used on an optional basis for Veterans and survivors applying for benefits. Completed forms compensation should be mailed to the nearest [Claims Intake Center.](http://www.benefits.va.gov/compensation/mailingaddresses.asp)  Completed forms for pension and survivors’ benefits should be mailed to the [nearest regional office](http://www.benefits.va.gov/benefits/offices.asp).

In addition, Veterans disagreeing with a VA compensation decision issued after March 23, 2015, must use [VA Form 21-0958](http://www.vba.va.gov/pubs/forms/VBA-21-0958-ARE.pdf), *Notice of Disagreement.* Previously use of the notice of disagreement form was also optional.

A new *intent to file* a claim process has also been established for applicants who need additional time to gather all of the information and evidence needed to support their claim. Applicants may notify VA of their *intent to file* a claim in order to establish the earliest possible effective date for benefits if they are determined eligible.

An *intent to file* may be submitted in one of four ways: 1) appointing a VSO to help initiate an *intent to file* via the Stakeholder Enterprise Portal, 2) electronically via eBenefits, 3) completing and mailing a paper VA Form 21-0966, *Intent to File a Claim for Compensation and/or Pension, or Survivors Pension and/or DIC*), or, 4) over the phone with a VA call center agent or in person with a public contact representative.

For more information on this change, visit <http://explore.va.gov/file-claim>

**Article for External Publication (Magazine/Newsletter/etc.)**

Starting March 24, 2015, the Department of Veterans Affairs (VA) now requires the use of standard claim forms for all claimants filing for disability compensation, pension, and survivors benefits. In addition, Veterans disagreeing with a VA compensation decision issued after March 23, 2015, must use [VA Form 21-0958](http://www.vba.va.gov/pubs/forms/VBA-21-0958-ARE.pdf), *Notice of Disagreement*. These forms are designed to make the process easier and more efficient. Using these forms, Veterans can clearly identify the benefit they are seeking and provide the information necessary for VA to start processing their claim or appeal.

“This change will help VA provide faster and more accurate decisions to our Veterans, their families and survivors,” said Under Secretary for Benefits Allison A. Hickey. “It brings VA’s processes in line with other government agencies such as those of the Social Security Administration and the Internal Revenue Service.”

These specified forms are designed to capture information necessary to identify and support compensation, pension and other benefit claims.

* The easiest and fastest way for Veterans filing for disability compensation benefits is to submit an application electronically through eBenefits, or through the Stakeholder Enterprise Portal with the assistance of a Veterans Service Organization.
* Veterans who prefer not to file electronically must complete and submit paper Form [21-526EZ](http://www.vba.va.gov/pubs/forms/VBA-21-526EZ-ARE.pdf), *Application for Disability Compensation and Related Compensation Benefits*.
* Wartime Veterans filing for needs-based pension must complete and mail paper Form 21-527EZ, *Application for Pension*.
* Survivors filing for dependency and indemnity compensation (DIC), survivor’s pension, or accrued benefits must complete and mail paper form 21-534EZ, *Application for DIC, Death Pension, and/or Accrued Benefits*.

The standardized Notice of Disagreement form is used when a Veteran wishes to initiate an appeal of a VA compensation decision.

* Beginning March 24, 2015, Veterans disagreeing with a VA compensation decision must use the [VA Form 21-0958](http://www.vba.va.gov/pubs/forms/VBA-21-0958-ARE.pdf), *Notice of Disagreement* that is now provided to them along with the notice of VA’s decision on their claim. Previously, the notice of disagreement form was used on an optional basis. Veterans and survivors will not be required to use a standardized notice of disagreement form to initiate appeals of pension or survivors benefit at this time.

A new *intent to file* process has also been established for applicants who need additional time to gather all of the information and evidence needed to support their claim. Applicants may notify VA of their intent to file a claim in order to establish the earliest possible effective date for benefits if they are determined eligible.

An *intent to file* may be submitted in one of four ways: 1) appointing a VSO to help initiate an *intent to file* via the Stakeholder Enterprise Portal, 2) electronically via eBenefits, 3) completing and mailing a paper VA Form 21-0966, Intent to File a Claim for Compensation and/or Pension, or Survivors Pension and/or DIC), or, 4) over the phone with a VA call center agent or in person with a public contact representative.

The *intent to file* process protects a claimant’s effective date while he or she collects information to support the claim, as long as the correct application form is submitted within 1 year of VA’s receipt of the *intent to file*.

For more information about standard forms and the *intent to file* process, visit <http://explore.va.gov/file-claim>

**Social Media (for posting on March 24, 2015):**

**Facebook/Google+**

The [U.S. Department of Veterans Affairs](https://www.facebook.com/VeteransAffairs) (VA) now requires the use of standard claim and appeal forms. VA wants to make it as fast and easy as possible for Veterans and their survivors to apply for benefits and receive timely and accurate claim decisions. This change brings VA processes in line with other government agency processes, such as those of the Social Security Administration and the Internal Revenue Service, which also require submissions on standard forms before they can pay benefits or issue refunds. Read more here (<http://www.blogs.va.gov/VAntage/18183/va-taking-guesswork-out-of-filing-for-benefits-by-requiring-forms/> or hyperlink to own content).

**Twitter**

.@DeptVetAffairs wants to make it fast and easy for #Veterans and survivors to file for a claim (<http://www.blogs.va.gov/VAntage/18183/va-taking-guesswork-out-of-filing-for-benefits-by-requiring-forms/>or hyperlink to own content))

.@DeptVetAffairs standardizes #benefits forms to ease frustration among claimants (<http://www.blogs.va.gov/VAntage/18183/va-taking-guesswork-out-of-filing-for-benefits-by-requiring-forms/>or hyperlink to own content)) @VAVetBenefits

**Q&A**

**Why is VA requiring standardized forms?**

VA is standardizing its disability application and appeal initiation processes. This update will increase VA efficiency by enabling faster, easier, more accurate identification of claims and appeals. For example, standard forms will make the process more efficient by allowing the Veteran to more clearly notify VA of what he or she is seeking, so that action can be initiated by claims processors more quickly. Additionally, VA’s requirement that Veterans and survivors use standardized forms conforms to common practices in the public and private sectors. For example, forms are required when applying for Social Security benefits.

When coupled with VA’s optional fully developed claim (FDC) program and new Veterans Benefits Management System (VBMS) claim processing environment, standard forms will allow VA to expedite the identification and processing of claims.

**Was there something wrong with the previous method of filing a claim or appeal?**

Yes. The previous process contributed to processing delays, inaccuracy and increased costs. VA needs a certain minimum amount of information to be able to begin to process a claim, and the previous method did not require most claimants to use easily-identifiable, standardized forms, which VA designed to obtain the information it needs to process a claim. This lack of standardization led to missed and misidentified claims, administrative delays, and, ultimately, claimant dissatisfaction with the process. The requirement to use standardized forms, in most cases, will help VA more quickly and accurately identify claims and gather information necessary to process them.

**Are Veterans still able to file informal claims?**

VA has preserved the effective date rules for Veterans and survivors through the creation of the *intent to file* a claim process. Under this process, Veterans and their survivors who need additional time to file a formal claim can notify VA that they intend to file a disability compensation, needs-based pension, or dependency and indemnity compensation (DIC) claim electronically through eBenefits.va.gov or with the assistance of a VSO using the Stakeholder Enterprise Portal, over the phone or in person with a regional office public contact person or on VA Form 21-0966, *Intent to File a Claim for Compensation and/or Pension, or Survivors Pension and/or DIC*. If mailing their intent to file, claimants cannot provide the same information contained on the form in a separate communication – they must use the form. After notifying VA of the intent to file, the claimant may then take up to a year to gather necessary evidence and file the claim using the appropriate standard EZ form. Consistent with the previous informal claim process, VA will be able to assign benefits retroactively to the date the individual filed the *intent to file* a claim form. While certain hospital and treatment records will no longer automatically constitute claims under this new rule, the potential effective date of benefits available to the Veteran is unchanged. In fact, under the *intent to file* a claim process, the Veteran has a full year from the date of medical records establishing an increase in disability to notify VA of his or her an *intent to file* a claim, and then has up to a year from that date to file a complete claim.

The new *intent to file* a claim form, VA Form 21-0966, requires minimal information: the individual’s name, biographical information sufficient to identify the claimant (such as a Social Security number) and the benefit program in which he or she intends to file a claim (such as disability compensation). Once VA receives this standard *intent to file* a claim form, the individual has one full year to file a claim for benefits on a standardized form. Moreover, individuals who use eBenefits and recognized VSOs who use SEP may complete the electronic equivalent of an *intent to file* a claim form online by simply initiating and then saving an un-submitted claim for compensation.

Whether filing by paper or electronically, the one-year period provides individuals the opportunity to gather and submit all the evidence necessary to substantiate a claim. Benefits may be granted effective the date the individual began the application in eBenefits or submitted the *intent to file* a claim form.

**What forms are Veterans or their survivors required to use?**

* Veterans filing for disability benefits, whether for the first time or in a subsequent claim, must do so through eBenefits, or by using paper Form 21-526EZ, *Application for Disability Compensation and Related Compensation Benefits*.
* Wartime Veterans filing for needs-based pension must use paper Form 21-527EZ, *Application for Pension*.
* Survivors filing a claim for dependency and indemnity compensation (DIC), survivor’s pension, or accrued benefits must use paper form 21-534EZ, *Application for DIC, Death Pension, and/or Accrued Benefits*.
* The EZ forms were previously available on an optional basis. Under the new regulations, VA will mandate their use. Veterans and survivors do not have to file fully developed claims (FDCs) when using these mandatory forms, but VA strongly encourages FDC participation because VA can expedite delivery of benefits through the FDC program.
* Veterans who need additional time to gather all of the information and evidence needed to support their claim have the option of using the *intent to file* a claim process. Because filing an *intent to file* a claim protects an effective date of benefits for up to one year, individuals seeking disability compensation or pension benefits will have a full year to gather and submit evidence necessary to support a claim by filing VA Form 21-0966, *Intent to File a Claim for Compensation and/or Pension, or Survivors Pension and/or DIC*. The new rule does not require that evidence necessary to support a claim be filed in order for the claim to be recognized as complete and for VA to take action. However, given that the submission of an *intent to file* a claim will protect the effective date of benefits for up to one year, Veterans will have an opportunity to gather and submit all evidence along with the complete claim, enabling a faster decision.
* Veterans disagreeing with a VA compensation decision should use VA Form 21-0958, *Notice of Disagreement*. Previously, the notice of disagreement form was used on an optional basis. However, starting today Veterans must use this form when VA provides the form to them along with the notice of VA’s decision on their claim. Veterans and survivors will not be required to use a standardized notice of disagreement form to initiate appeals of pension or survivors benefit at this time.

VA will continue to rely on the assistance of our VSO partners to help Veterans file their claims.

**Attachments:**

**Fact Sheets**

**BAS outreach material**