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## Chapter 2. Customer Service

### 1. Overview of Customer Service

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**Introduction** This topic contains an overview of customer service, including information on:

- background on customer service
  - traits of world-class service
  - who our customers are, and
  - our responsibility.
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**a. Background on Customer Service** Customer service is often seen as an activity, performance measurement, and a philosophy that satisfies customer needs (real or perceived) in a consistent, dependable, and professional manner.

As mentioned in our mission statement, the Quality Client Services Staff has a primary responsibility for ensuring Public Contact Representatives (PCRs) provide *world-class* customer service to callers, visitors, and those who write us. As the face of VA, PCRs will provide the first impression to those reaching out to VA for assistance.

We must never forget the words of General Omar Bradley, “...*we’re dealing with Veterans, not procedures, with their problems, not ours.*”

*World-Class* Customer service is:

- *more* than a process; it is a purpose
  - exceeding customers’ expectations
  - providing customers with assistance, information, explanations, and options to meet their needs and concerns, and
  - the *commitment* to providing value added services to Veterans, dependents and survivors, including knowledge, technical support, and quality service in an accurate, clear, concise, and timely manner.
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## 1. Overview of Customer Service, Continued

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### b. Traits of World-Class Customer Service

To provide world-class customer service, the following traits are essential:

- patience
  - perception and sensitivity
  - non-threatening demeanor
  - sense of humor
  - a genuine desire to help
  - a positive attitude
  - active listening skills
  - empathy
  - warm personality, and
  - problem solving.
- 

### c. Who Are Our Customers?

Our customer base is diverse and includes, but is not limited to:

- servicepersons
  - Veterans
  - Veterans' dependents
  - deceased Veterans' dependents
  - Veterans' guardians
  - Veterans Service Organization representatives, and
  - various Federal, state, and local government agencies.
- 

### d. Our Responsibility to Provide World-Class Service

Meeting our responsibility to provide *world-class* service means:

- providing those who contact us with clear and concise information that is:
    - professional
    - accurate
    - consistent
    - courteous
    - timely
    - empathetic
    - compassionate, and
    - sympathetic.
  - understanding that *all* VA employees who work directly with our customers occupy a position of *trust*.
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## 2. Providing Information to a Third Party

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<b>Introduction</b>	<p>This topic contains guidance on providing information to a third party including:</p> <ul style="list-style-type: none"><li>• who can receive information</li><li>• releasing information to a third party, and</li><li>• disclosing financial information.</li></ul> <hr/>
<b>Change Date</b>	<p>Initial content load September 2012</p> <hr/>
<b>a. Who Can Receive Information</b>	<p>Provide information <i>only</i> to the:</p> <ul style="list-style-type: none"><li>• Veteran</li><li>• claimant</li><li>• guardian</li><li>• legal representative of the Veteran or claimant, or</li><li>• fiduciary and court-appointed powers of attorney (POAs).</li></ul> <p><i>Note:</i> A legal representative is someone holding a valid power of attorney (POA) or representative appointed via <a href="#">VA Form 21-0845, Authorization to Disclose Personal Information To a Third Party</a>, which has been recognized by VA.</p> <hr/>
<b>b. Releasing Information to a Third Party</b>	<p>Do not release any information to a third party without the <i>written</i> or verbal authorization from the Veteran, claimant, or fiduciary, except for those requests by authorized third parties.</p> <hr/>
<b>c. Disclosing Financial Information</b>	<p>Disclosure of the current monthly amount of any benefit is authorized to anyone who inquires, but do not provide the reason for the payment (such as compensation, pension, or education).</p> <p>It is noted that financial information is also disclosed on the eBenefits application for those holding a Premium Account.</p> <hr/>

### 3. Providing Information About VA Benefits

**Introduction** This topic contains guidance on providing information about VA benefits, including:

- determining the information required
- counseling claimants who have previously filed a claim
- counseling claimants who have not previously filed a claim, and
- collecting additional documentation or information.

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**a. Determining the Information Required** Use the table below to determine the information required before counseling the claimant about VA benefits.

<b>If the claimant ...</b>	<b>Then ...</b>
asks about a specific benefit	determine if the claimant <ul style="list-style-type: none"> <li>• has previously filed a claim</li> <li>• has a claim pending, or</li> <li>• recently received a decision notification.</li> </ul>
does <i>not</i> ask about a specific benefit	<ul style="list-style-type: none"> <li>• narrow the scope of the inquiry by asking directed questions regarding specific benefits such as:                             <ul style="list-style-type: none"> <li>– compensation or pension</li> <li>– death benefits</li> <li>– burial benefits</li> <li>– vocational rehabilitation, or</li> <li>– education</li> </ul> </li> <li>• inform the claimant of potential eligibility for any benefits that may become evident during the interview, including non-VA benefits, and</li> <li>• determine whether the claimant has previously filed a claim.</li> </ul>

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### 3. Providing Information About VA Benefits, Continued

**b. Counseling Claimants Who Have Previously Filed a Claim**

When counseling claimants who have previously filed a claim, ask if the claimant is currently receiving benefits and use the information in the table below to counsel the claimant.

If the claimant is currently ...	Then ...
receiving benefits	<ul style="list-style-type: none"> <li>• determine nature of the call</li> <li>• open the necessary system of records (e.g., Modern Award Processing-Development (MAP-D), Veterans Appeals Control and Locator System (VACOLS, Customer Relationship Management (CRM)/Unified Desktop (UD)), as appropriate</li> <li>• counsel the claimant to submit evidence (such as any medical treatment records) to support the claim</li> <li>• provide all essential information needed to reopen or initiate an informal claim, and</li> <li>• protect the claimant's payment date (date of claim) by appropriate documentation on <a href="#"><i>VA Form 21-0820, Report of General Information.</i></a></li> </ul>
not receiving benefits	<ul style="list-style-type: none"> <li>• check the status of the claim to see if it is pending</li> <li>• inform the claimant of the status of the claim</li> <li>• advise the claimant of any other action needed on the claim, and</li> <li>• inform the claimant when to expect (provide an approximate timeframe only) an answer on the claim.</li> </ul>

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### 3. Providing Information About VA Benefits, Continued

**c. Counseling Claimants Who Have Not Previously Filed a Claim**

Follow the steps in the table below to counsel a claimant who has not previously filed a claim.

Step	Action
1	<ul style="list-style-type: none"> <li>• Inform the claimant of the basic eligibility requirements for the benefit, and</li> <li>• ask if the claimant wants to apply for the benefit.</li> </ul>
2	<p>If the claimant does want to apply for the benefit, then</p> <ul style="list-style-type: none"> <li>• counsel the claimant to file a formal claim</li> <li>• help claimant complete the application or send the appropriate application</li> <li>• provide information about the claims process, and</li> <li>• inform the claimant of other supporting documentation that must be submitted, such as                             <ul style="list-style-type: none"> <li>– medical evidence,</li> <li>– birth certificates, and/or</li> <li>– marriage licenses.</li> </ul> </li> </ul> <p>Note: Completion of the <a href="#">VA Form 21-0820, Report of General Information</a>, is not an option. If the caller states his intent to file, the Public Contact Representative (PCR) must initiate a <a href="#">VA Form 21-0820, Report of General Information</a>.</p>

**d. Collecting Additional Documentation or Information**

[VA Form 21-0820, Report of General Information](#), should be used to:

- document the discussion in order to establish a date of claim and/or receipt of information if benefits are subsequently granted.
- collect and date stamp any additional information or documentation the claimant may provide and forward it for association with the claim.



## 4. Providing VA Information to Support Non-VA Related Benefits

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**Introduction** This topic contains information on providing information about non-VA related benefits, including:

- examples of non-VA benefits
  - confirmation or certification letters
  - releasing information to other agencies
  - providing information to estranged spouses requesting a breakdown of benefits for Social Security purposes, and
  - providing non-VA related benefit information.
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**a. Examples of Non-VA Related Benefits**

Some examples of non-VA related benefits include:

- state benefits
  - local tax exemptions
  - access to commissary and exchange privileges at military installations, and
  - Civil Service preference.
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**b. Confirmation or Certification Letters**

Confirmation or certification letters are a statement of qualification for non-VA benefits and can:

- be issued based on the information (included in the system of records) about amount and types of VA benefits in the Veterans' Beneficiary Identification and Records Locator subsystem (BIRLS), Share, Veterans Service Network (VETSNET), or Master Record.
  - be requested *only* by the Veteran or a legal representative on behalf of a Veteran (however, we can send a letter to the address of record of the Veteran/beneficiary based upon anyone's request.)
  - include *only* the information specifically requested.
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## 4. Providing VA Information to Support Non-VA Related Benefits, Continued

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**b. Confirmation or Certification Letters**  
(continued)

**Note:** No authorization is required for a current monthly amount letter since this is public information that can be released without authorization and can be sent to anyone (not just the Veteran/claimant) as long as the letter has been sanitized or redacted as appropriate.

**Note:** This information is also available on the eBenefits application for those with Premium accounts.

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**c. Releasing Information to Other Agencies**

Release information to a:

- Federal agency without requiring a signed authorization from the Veteran, and
  - non-Federal agency as follows:
    - a signed authorization from the Veteran is not required
    - request must be in writing (facsimile is acceptable)
    - information released must be relevant and necessary to the requesting agency’s decision on granting another benefit by that agency (in other words, the request must be a “routine use” request.)
- 

**d. Providing Information to Estranged Spouses for Social Security Purposes**

On occasion, requests are received from estranged spouses requesting a “breakdown” of benefits letter for Social Security purposes. Typically, this occurs when VA is paying benefits for an estranged spouse on a pension award, and the Social Security Administration (SSA) needs to know how much of the Veteran’s benefit is attributable to the spouse.

Unless the estranged spouse is a beneficiary under an *apportionment* award, we **cannot** provide this information. If the spouse is not receiving benefits under an apportionment and indicates a need for this information for SSA, you must advise the requester to contact SSA and have that agency request the needed information directly from VA.

**Note:** Explain to the requester that VA is unable to provide this information because of current privacy restrictions and regulations.

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## 4. Providing VA Information to Support Non-VA Related Benefits, Continued

### e. Providing Non-VA Related Information

Follow the steps in the table below to provide non-VA related benefit information.

Step	Action
1	<p>Is a confirmation or certification letter required?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, provide the claimant with a statement of benefits.</li> <li>• If <i>no</i>, go to Step 2.</li> </ul>
2	<p>Does the claimant need any VA forms?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, <ul style="list-style-type: none"> <li>– provide website to download form, and/or</li> <li>– mail or email the requested forms.</li> </ul> </li> <li>• If <i>no</i> <ul style="list-style-type: none"> <li>– determine what other information the claimant needs, and</li> <li>– provide the appropriate information, such as agency names, phone numbers, or addresses.</li> </ul> </li> </ul>

## 5. Procuring Vital Statistics Documents

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**Introduction** This topic contains information about procuring vital statistics documents, including:

- requesting vital statistic documents
  - obtaining vital statistics documents, and
  - requests for information from the National Personnel Records Center (NPRC) and Reserve Components Personnel and Administration Center (RCPAC).
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**a. Requesting Vital Statistics Documents** Technical personnel may request copies of vital statistics documents required for determination of entitlement to VA benefits.

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**b. Obtaining Vital Statistics Documents** Follow the steps in the table below to request vital statistics documents.

Step	Action
1	Request vital records by sending the following to the address shown in the current version of <a href="#">Where to Write for Vital Records</a> : <ul style="list-style-type: none"> <li>• a locally-generated letter, or</li> <li>• a Modern Awards Processing Development (MAP-D) letter selecting the <i>Public record-request for certified copy</i> paragraph.</li> </ul>
2	Place copies of the written requests with the application for benefits in the claims folder.

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## 5. Procuring Vital Statistics Documents, Continued

### b. Obtaining Vital Statistics Documents (continued)

Step	Action
3	<p>If a related application has been forwarded to VA previously, submit a copy of the request for vital statistics by <i>Optional Form 41, Routing and Transmittal Slip</i>, for filing with the Veteran's records.</p> <p><b>Note:</b> The Department of Health and Human Services has an on-line reference entitled <a href="#">Where to Write for Vital Records</a>.</p>

### c. Requests for Information from NPRC/RCPAC

Make requests for information from the National Personnel Records Center and Reserve Components Personnel and Administration Center through the designated regional office Military Records Specialist using [VA Form 21-0820](#). The request should identify what records are needed (i.e., DD 214, service treatment records, etc.).

## 6. Handling Non-Claim Actions

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**Introduction** This topic contains information on handling non-claim actions, including:

- a definition of *non-claim actions*
  - examples of non-claim actions, and
  - processing non-claim actions.
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**a. Definition: Non-Claim Actions** *Non-claim actions* involve requests for information and information changes that need to be entered into the Master Record.

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**b. Examples of Non-Claim Actions** Some examples of non-claim actions are:

- changes of address
  - direct deposit changes, and
  - tracer action on missing benefit checks.
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**c. Processing Non-Claim Actions** Follow the steps in the table below to process a non-claim action.

<b>Step</b>	<b>Action</b>
1	Is the caller the Veteran, claimant, or legal representative of the Veteran or claimant? <ul style="list-style-type: none"> <li>• If <i>yes</i>, go to Step 2.</li> <li>• If <i>no</i>, take action to verify the information with the Veteran, claimant, or legal representative of the Veteran or claimant.</li> </ul> <p><b>Note:</b> Ensure you use the appropriate ID protocol.</p>
2	Update the Master Record or Corporate Record without creating a claim action.

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## 6. Handling Non-Claim Actions, Continued

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### c. Processing Non-Claim Actions (continued)

**Note:** VA electronic applications, such as SHARE, do not currently include a function for entry of authorization of a VSO to change a claimant's address. The possibility of adding this information into VA's corporate record is being explored. For this reason, a change of address or direct deposit information by a VSO will only be accepted in writing.

An individual or organization identified on a valid VA Form 21-0845 may continue to initiate or change a direct deposit account on behalf of the claimant or beneficiary *in person or in writing, as long as the valid 21-0845 indicates this action is authorized.* .

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## 7. Claimant Representation by Non-Attorney or Non-Accredited Agents

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**Introduction** This topic contains information on claimant representation by non-attorney or non-accredited agents, including:

- regulatory references
- background information
- certification requirements, and
- the type of information that may be released.

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**a. Regulatory References for Claimant Representation** 38 CFR 14.629 provides information relative to service organizations, representatives, agents, attorneys, and the accreditation process.

38 CFR 14.630 provides an exception to the regulations governing representation in that it provides that “Any person may be authorized to prepare, present, and prosecute one claim...”

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**b. Background on Claimant Representation** Individuals acting under the provisions of 38 CFR 14.630 are commonly known or referred to as “lay-persons.” Information may be released to these individuals in the same manner it may be released to any other person holding power of attorney (POA) status.

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## 7. Claimant Representation by Non-Attorney or Non-Accredited Agents, Continued

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### b. Background on Claimant Representation (continued)

In order for this individual to be granted status under 38 CFR 14.630, the potential representative and the claimant must meet the certification requirements shown below.

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### c. Certification Requirements for Claimant Representation

Any individual seeking to represent a claimant under the provisions of 38 CFR 14.630 must execute [VA Form 21-22a, Appointment of Individual as Claimant's Representative](#).

Both the claimant and the potential representative must:

- complete [VA Form 21-22a](#), and
  - sign a written statement that no compensation will be charged or paid for services provided.
- 

### d. What Type of Information May be Released?

Information may be provided to a “lay-person” in the same manner it is released to any other person holding POA status, provided they have properly completed [VA Form 21-22a](#) and have executed the certification statement relative to fees.

**Important:** If there is no record of POA designation, the “lay-person” should be considered a “third party” and appropriate privacy protocols apply.

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## 8. Handling Media Inquiries

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**Introduction** This topic contains information on handling media inquiries, including:

- general procedures, and
  - supervisory responsibilities.
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**a. General Procedures for Handling Media Inquiries** In the event you receive a media inquiry presented by telephone, Inquiry Routing and Information System (IRIS) inquiry, or personal contact (walk-in):

- do *not*, under any circumstances, attempt to answer the inquiry
  - inform the inquirer that you will forward the media request to the local Public Affairs Officer (PAO) and the PAO will contact them shortly, and
  - immediately inform a supervisor within your chain of command of the inquiry.
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**b. Supervisory Responsibilities for Handling Media Inquiries** The supervisor, upon receipt of the media inquiry, should immediately refer the inquiry to the PAO for a formal response.

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