

**Interview Checklist**

Last 4: \_\_\_\_\_

Name: \_\_\_\_\_

Phone #: \_\_\_\_\_

Branch: \_\_\_\_\_

POA: \_\_\_\_\_

Service Dates: \_\_\_\_\_

In-Country Service?:  YES  NO

If YES, Which Country: \_\_\_\_\_

**CURRENT RATING(S)**

SC%	DISABILITY
_____	_____

**COMMON DOCUMENTS LIST**

- \_\_\_\_\_ 21-526EZ
- \_\_\_\_\_ DD214 or equivalent
- \_\_\_\_\_ 21-22 POA
- \_\_\_\_\_ 21-4138 Statement in Support of Claim
- \_\_\_\_\_ 21-10210 Lay/Witness Statement
- \_\_\_\_\_ 21-0845 3<sup>rd</sup> Party Disclosure
- \_\_\_\_\_ 5103 Notice
- \_\_\_\_\_ 21-4142 Consent to Release Medical to DVA

or Preferred

\_\_\_\_\_ copies of Medical Records (Pvt/ VetCenter)

**SC CLAIM**

- \_\_\_\_\_ Direct Service Claim (21-526EZ)
- \_\_\_\_\_ Secondary Claim (21-526EZ)
- \_\_\_\_\_ Increase Claim (21-526EZ)
- \_\_\_\_\_ Supplemental (20-0995)
- \_\_\_\_\_ Convalescence (21-526EZ)

**FILE FOR:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**NOTES:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**MISC.**

- \_\_\_\_\_ 20-572 Change of Address/Cancel EFT
- \_\_\_\_\_ DD149 App for Changing Military Record
- \_\_\_\_\_ DD293 App for the Review of Discharge
- \_\_\_\_\_ 20-10207 Priority Processing Request
- \_\_\_\_\_ 10-10EZ Application for Health Benefits
- \_\_\_\_\_ 26-1880 Request for COE/ Home Loan Guaranty
- \_\_\_\_\_ DD 2860 Claim for Combat-Related Special Compensation (CRSC)
- \_\_\_\_\_ 21-0847 Request for Substitution of Claimant Upon Death of Claimant
- \_\_\_\_\_ 20-0995 Supplemental Claim
- \_\_\_\_\_ 20-0996 Higher Level Review
- \_\_\_\_\_ VA Form 10-182 BVA Appeal
- \_\_\_\_\_ Other \_\_\_\_\_
- \_\_\_\_\_ Other \_\_\_\_\_

**MEDICAL EVIDENCE**

- \_\_\_\_\_ Private Medical Records or 21-4142
- \_\_\_\_\_ Tx records from a VetCenter or 21-4142
- \_\_\_\_\_ Tx at a VA facility
- \_\_\_\_\_ DBQ: \_\_\_\_\_
- \_\_\_\_\_ DBQ: \_\_\_\_\_
- \_\_\_\_\_ DBQ: \_\_\_\_\_
- \_\_\_\_\_ SMRs
- \_\_\_\_\_ Letter(s) from Physician
- \_\_\_\_\_ Lay Statements
- \_\_\_\_\_ Diagnosis

**PTSD**

- \_\_\_\_\_ 21-0781 PTSD
- \_\_\_\_\_ 21-0781a PTSD w/ MST
- \_\_\_\_\_ Lay statement(s)
- \_\_\_\_\_ 21-4142a for VetCenter or Pvt Tx

**TDIU**

- \*individual SC disability rated @ ≥60% or Combined SC @ ≥70% with individual SC @ ≥40%
- \_\_\_\_\_ 21-8940 Individual Unemployability
  - \_\_\_\_\_ 21-4192 IU Employment Information
  - \_\_\_\_\_ Proof of difficulty retaining gainful employment
  - \_\_\_\_\_ Exceptional cases: 3.321 B (2)

## Interview Checklist

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### DIC

\*death must be SC or eligible for SC.

\_\_\_\_\_ 21P-534EZ  
\_\_\_\_\_ Death Certificate (SC cause of death)  
\_\_\_\_\_ 21-0847 Request for Substitution of Claimant  
Upon Death of Claimant  
\_\_\_\_\_ Evidence of SC award or eligibility  
\_\_\_\_\_ ≥55 y/o or unmarried child ≤ 18 y/o  
\_\_\_\_\_ Income and Net Worth documents (Parents)  
\_\_\_\_\_ 21-8416 Medical Expense Report (Parents)

### SURVIVOR'S PENSION

\* to be eligible, Veteran must have served ≥90 days with ≥1 day served during time of war,

\*\* surviving spouse, unmarried child of Veteran or parent of Veteran

\*\*\*income based award

\_\_\_\_\_ 21P-534EZ  
\_\_\_\_\_ Income and Net Worth documents  
\_\_\_\_\_ ALL Medical Expenses  
\_\_\_\_\_ DBQ: \_\_\_\_\_  
\_\_\_\_\_ DBQ: \_\_\_\_\_  
\_\_\_\_\_ Exceptional cases: 38 CFR 3.321 B (2)  
\_\_\_\_\_ 21-8416 Medical Expense Report (**yearly req**)  
\_\_\_\_\_ 21-0571 Exclusion of Child's Income

### NSC PENSION

\* to be eligible, Veteran must have served ≥90 days with ≥1 day served during time of war, death must be SC or eligible for SC.

\*\* Claimant must be ≥65 y/o

\*\*\*income based award

\_\_\_\_\_ 21P-527EZ  
\_\_\_\_\_ Income and Net Worth documents  
\_\_\_\_\_ ALL Medical Expenses  
\_\_\_\_\_ DBQ: \_\_\_\_\_  
\_\_\_\_\_ DBQ: \_\_\_\_\_  
\_\_\_\_\_ 21-4142 Pvt Tx and VetCenter  
\_\_\_\_\_ Exceptional cases: 3.321 B (2)  
\_\_\_\_\_ 21-8416 Medical Expense Report  
\_\_\_\_\_ 21-0571 Exclusion of Child's Income

### INCREASED CARE (A&A/Housebound)

\_\_\_\_\_ 21-2680 A&A  
\_\_\_\_\_ 21-0779 A&A in Nursing Home  
\_\_\_\_\_ ≥65 y/o for pension  
\_\_\_\_\_ Unmarried or married after 55 y/o for DIC  
\_\_\_\_\_ 21-8416 Medical Expense Report  
\_\_\_\_\_ 21-0571 Exclusion of Child's Income

### GUARD AND RESERVE MEMBERS

\* **MUST** submit any and all Service Tx Records and Personnel Records from their unit (s)

\_\_\_\_\_ Tx Records  
\_\_\_\_\_ Personnel File

### CLAIMING DEPENDENTS or anticipating ≥30% Rating

\_\_\_\_\_ 21-686c Dependents  
\_\_\_\_\_ Marriage Certificate or date and place  
\_\_\_\_\_ Divorce Decree  
\_\_\_\_\_ Birth Certificates of all children  
\_\_\_\_\_ SSNs for all individuals  
\_\_\_\_\_ Proof of Helplessness if applicable  
\_\_\_\_\_ 18-23 y/o attending school? PROOF

### Adaptive Housing or Vehicle

\_\_\_\_\_ 10-8678 App for Annual Clothing Allowance  
\_\_\_\_\_ 10-1394 App for Adaptive Equip Motor Vehicle  
\_\_\_\_\_ 26-4555 Special Adaptive Housing  
\_\_\_\_\_ 21-4502 Auto or Other Conveyance and Adaptive Equipment

### Education Benefits

\_\_\_\_\_ 22-1990 App for VA Educational Benefits  
\_\_\_\_\_ 22-5490 App for Survivor's & Dependents Educational Assist (TDIU or P&T)  
\_\_\_\_\_ 28-1900 App for Voc Rehab

### Common Law (Not recognized in TN)

\_\_\_\_\_ 21-4170 Statement of Marital Relationship  
\_\_\_\_\_ 21-4171 Supporting Statement Regarding Marriage

### Death Benefits

\* surviving spouse burial payment is automatic now

\_\_\_\_\_ Application for Burial Benefits  
\_\_\_\_\_ 21-2008 App for US Flag for Burial  
\_\_\_\_\_ App for Gov Headstone/Marker OR Medallion  
\_\_\_\_\_ Presidential Memorial Certificate request