

## APPOINTMENT CHECKLIST

The following Checklist will help you gather the information you will need for filing a fully developed Compensation, Pension, Dependency and Indemnity Compensation (DIC) and Survivors Pension Claims.

**\*\* Clients filing for benefits on behalf of veterans, veteran spouses and or their dependents must show an Original Power of Attorney indicating they have legal authority over the person in question. The Power of Attorney must be notarized and contain information that clearly states who is allowed to make decisions related to their veteran benefits. \*\***

Once ALL materials have been gathered, please call (714) 480-6555 or email [OCVSO@OCCR.ocgov.com](mailto:OCVSO@OCCR.ocgov.com) to make an appointment.

### **COMPENSATION CLAIMS:**

*In order to file a fully developed Compensation Claim, you must provide the following:*

- Original or certified copy of **DD Form 214** or equivalent.  
*Note:* if you do not have copies of STRs, you may request records via the National Archives website, <http://www.archives.gov/veterans/evetrecs/index.html>
- Copies of all, if any, current relevant private treatment records or **Disability Benefits Questionnaires (DBQs)**. (<http://benefits.va.gov/disabilityexams/>)
- Voided personal check.

*If claiming dependents, the following additional information is also needed:*

- Copy of marriage certificate.
- If veteran or spouse have previously been married, a complete history of previous marriages such as date of marriage, location of marriage (city and state), person they were married to, how did marriage end (death or divorce), date marriage ended and place marriage ended. If possible include final dissolution of marriage for any prior marriages.
- Copy of birth certificates or final decree of adoption for dependent children.
- Social Security Numbers of dependents.

### **PENSION CLAIMS:**

*In order to file a fully developed Pension Claim, you must provide the following:*

- Original or certified copy of **DD Form 214** or equivalent with proof of wartime service.
- Certain VA Benefits Require Wartime Service: under the law, VA recognizes these periods of war:

**World War I:** April 6, 1917, through Nov. 11, 1918; for Veterans who served in Russia, April 6, 1917, through April 1, 1920; extended through July 1, 1921, for Veterans who had at least one day of service between April 6, 1917, and Nov. 11, 1918.

**World War II:** Dec. 7, 1941, through Dec. 31, 1946.

**Korean War:** June 27, 1950, through Jan. 31, 1955.

**Vietnam War:** Aug. 5, 1964 (Feb. 28, 1961, for Veterans who served "in country" before Aug. 5, 1964), through May 7, 1975.

**Gulf War:** Aug. 2, 1990, through a date to be set.

- Voided personal check.
- If veteran is under the age 65, not in receipt of Social Security Disability Insurance (SSDI) / Supplemental Security Insurance (SSI) or not in a nursing home, also need:
  - Copies of recent medical records, signed by a physician, showing clinical description of permanent and totally disabled (P&T) status, diagnosis, and prognosis.
- A listing of all current income and net-worth information, such as Social Security benefits, retirement income, dividends.

**If you have dependents, the following additional information is also required:**

- Copy of marriage certificate.
- If veteran or spouse have previously been married, a complete history of previous marriages such as date of marriage, location of marriage (city and state), person they were married to, how did marriage end (death or divorce), date marriage ended and place marriage ended. If possible include final dissolution of marriage for any prior marriages.
- Copy of birth certificates or final decree of adoption for dependent children.
- Social Security Numbers of dependents.

**If claiming aid and attendance, or housebound benefits, the following additional information is also required:**

- A **VA Form 21-2680**, Housebound Status of Permanent Need for Regular Aid and Attendance Examination, completed by a physician (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>).
- If veteran is in a nursing home, also provide **VA Form 21-0779**, Request for Nursing Home Information in Connection with Claim for Aid and Attendance (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>).
- If claiming medical expenses from a care giver, assisted living or nursing home, also provide a completed **Care Expense Statement** (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>)

### **DEPENDENCY AND INDEMNITY COMPENSATION (DIC) CLAIMS:**

***In order to file a fully developed Dependency and Indemnity Compensation Claim, you must provide the following:***

- Original or certified copy of **DD Form 214** or equivalent.
- Copy of Veteran's Death Certificate.
- Voided personal check.
- Copy of marriage certificate to show dependency.
- If veteran or spouse have previously been married, a complete history of previous marriages such as date of marriage, location of marriage (city and state), person they were married to, how did marriage end (death or divorce), date marriage ended and place marriage ended. If possible include final dissolution of marriage for any prior marriages.

**SURVIVORS PENSION (FORMERLY DEATH PENSION) CLAIMS:**

- Original or certified copy of **DD Form 214** or equivalent with proof of wartime service.

Certain VA Benefits Require Wartime Service: under the law, VA recognizes these periods of war:

**World War I:** April 6, 1917, through Nov. 11, 1918; for Veterans who served in Russia, April 6, 1917, through April 1, 1920; extended through July 1, 1921, for Veterans who had at least one day of service between April 6, 1917, and Nov. 11, 1918.

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**Gulf War:** Aug. 2, 1990, through a date to be set.

- Voided personal check.
- A listing of all current income and net-worth information, such as Social Security benefits, retirement income, dividends.
- Copy of Veteran's Death Certificate.
- Copy of marriage certificate to show dependency.
- If veteran or spouse have previously been married, a complete history of previous marriages such as date of marriage, location of marriage (city and state), person they were married to, how did marriage end (death or divorce), date marriage ended and place marriage ended. If possible include final dissolution of marriage for any prior marriages.

**If claiming aid and attendance, or housebound benefits, the following additional information is also needed:**

- A completed **VA Form 21-2680**, Examination for Housebound Status of Permanent Need for Regular Aid and Attendance (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>).
- If veteran is in a nursing home, also provide **VA Form 21-0779**, Request for Nursing Home Information in Connection with Claim for Aid and Attendance (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>).

- If claiming medical expenses from a care giver, assisted living or nursing home, also provide a completed **Care Expense Statement** (available on the Veterans Service Office website <http://veterans.ocgov.com/benefits>)

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