

DVOP/CVSO: Promising Practices to Connect and Serve

INTRO: Welcome to the National Veterans' Training Institute Podcast Series, where we discuss pressing issues affecting today's veterans.

HOST: Hello everyone, and welcome! We appreciate you all joining us today. My name is Hannah Toney, and I'm going to be today's host. Let's take a few moments to introduce the panel. Will you each share your name, your role, and where you are located?

Zach: Good morning. I'm Zach Migura. I'm the Executive Director & County Veterans Service Officer of the Veterans Service Commission in Wood County, Ohio. Our office is located in Bowling Green, and in voluntary and appointed positions, I serve as the Education Committee's Content Manager of the National Association of County Veterans Service Officers and as the Education Chair of the Ohio State Association of County Veterans Service Officers.

Mike: Good morning. I am Mike Farmer, the Executive Director and County Veterans Service Officer for the Butler County Veterans Service Commission in Southwest Ohio. I currently serve as a trainer for the National Association of County Veterans Service Officers and serve as a Board Member for the Ohio State Association of County Veterans Service Officers.

Nathalie: Sure thing, Hannah. My name is Nathalie Grogan, and I am a Research Associate in the Military, Veterans, and Society Program at the Center for a New American Security, a bipartisan national security think tank in Washington, DC. I research issues that affect the people of the military community, such as veterans and military families.

HOST: Great, it is wonderful to meet everyone today; and thank you so much for being here! As we get started on this podcast, will you first explain the role of the County Veterans Services Officer (CVSO) and what some of the requirements are to be a CVSO, just so we make sure that this audience is all on the same page. Nathalie, if you don't mind, get us started on this one.

Nathalie: Sure. CVSOs provide services to veterans on the county level, including disability and pension compensation, Veterans Affairs (VA) claims filing, benefits eligibility, and more. The requirements to be a CVSO vary across jurisdictions.

Zach: Absolutely, Nathalie. The role and requirements of CVSOs can differ by state and county, but one of our primary roles is to assist veterans and eligible dependents in our county to prepare, submit and attain any and all benefits at the federal, state, and local levels. We are US Department of Veterans Affairs accredited representatives of at least

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one but usually several Veterans Service Organizations (VSOs). So, our state statutes are going to define who is eligible to become a County Veterans Service Officer.

Mike: Additionally, County Veterans Service Officers are the veteran's local community connection who can assist with different aspects of VA benefits and review eligibility criteria with veterans. CVSOs assist veterans and their eligible dependents with things such as disability and pension claims, education benefits, and enrollment in VA Healthcare, just to name a few of the things. While the eligibility to serve as a CVSO varies across the nation, the commonality is the desire to help those who served in the Armed Forces.

HOST: Great information, thank you all for explaining. I know that some CVSOs also hold special accreditations. Will you share the types of accreditations that CVSOs often have, as well as how these accreditations impact your ability to assist veterans? Zach, would you get us started on this one, please?

Zach: Oh, absolutely. So, the US Department of Veterans Affairs Office of General Counsel can accredit attorneys, claims agents, and veterans service organization representatives. So, what happens is CVSOs gain VA accreditation through their respective state veterans' affairs agency, and then they can also cross-accredit with other congressionally chartered Veteran Service Organizations such as the National Association of County Veterans Service Officers. So, then it is really the state veterans' agencies and other VSOs they often interweave and have memorandums of understanding so they can all work together with training. So, a lot of times, CVSOs will be accredited with American Legion, Disabled American Veterans or DAV, and Veterans of Foreign Wars or VFW, just to name a few. And once they hold these multiple accreditations, they can see into the VAIT systems just as a VA employee would using a VA Personal Identity Verification (VAPIV) card. Obviously, this access gives us the most up-to-date picture of our client with the VA, so we can confidently talk with the client and the VA on their behalf no matter where they are in the process. And then having multiple accreditations means that it might not matter which Veterans Service Officer (VSO) has been appointed as the rep. just, at a minimum, we can see their situation and how to proceed with the VA Benefits Administration.

HOST: Thank you, Zach, that was excellent information! We also often talk about the resources and services available to veterans, but we know that sometimes veterans are unaware of what is available. Can you share how veterans find you to get services? Do they refer to you? Mike, can you start us off here?

Mike: Sure, Hannah. So, CVSOs can be found throughout the communities near you. While sometimes we do receive referrals from organizations like American Warrior Partnership or other nonprofits, such as a social worker maybe it is at a VA Medical

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Center, we really strive to make awareness a priority through radio, tv commercials, billboards. While not all communities have the budget to advertise in such a prominent manner, social media and the internet is a great place to search for your nearest CVSO.

Zach: I find that veterans most often find us by a word-of-mouth referral by a friend, family, or some other member of the community. A lot of times the VA healthcare facilities will refer their clients to us for services, and as Mike said, many CVSO they advertise on several platforms such as TV, radio, internet, social media, etc.

HOST: Connections are crucial in helping veterans, and we know that your role is one where you help make those connections. Based on your experience, what role do the CVSO and Disabled Veterans' Outreach Program or DVOP specialist play in assisting veterans in obtaining services? Nathalie, would you begin for us here?

Nathalie: Sure. CVSOs work on behalf of veterans in their jurisdictions and counties to advocate for them by submitting VA claims or eligibility documentation and connecting them to resources available in the community.

Mike: That is right, Nathalie, and CVSOs and the DVOP having a good relationship really go hand in hand despite working in two different areas. So, while the CVSOs advocate for claims and other benefits on the veteran's behalf, the DVOP specializes in employment. And often, claim work submitted by a Service Officer can take months to get through the federal system. Part of the normal meeting with a CVSO usually includes a screening to check for employment and/or underemployment. Having the ability for a warm handoff often proves more successful than just a referral. Similarly, if a DVOP has a meeting with a veteran, they may identify a benefit area that might be useful to that veteran. That referral back to the CVSO can lead the veteran to better successful outcomes, or often a shorter amount of waiting time.

Zach: I agree, Mike; a smooth CVSO and DVOP relationship is essential to a veteran because it doesn't matter who has contact first, as long as a smooth transition is made. Many vets feel they need benefits as quickly as possible to support themselves and their families. Similarly, employment is one of those essential factors to thriving after military service. So, part of our intake and appointments with a CVSO is asking our clients if they are employed or underemployed to see if an introduction to our DVOP is warranted. We've got a great relationship with our DVOP, and sometimes the call is made while our client is still sitting there in our office. From a CVSO perspective, it's great to provide the best services possible without duplicating services or trying to enter an area that is heavily involved and often not our specialty.

HOST: With all of the amazing work you are able to do with veterans, how can they schedule a time to speak with you? We also know that emergencies happen. If they

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face an emergency, how can a veteran quickly access your services? Mike, would you start us off on this one, please?

Mike: Sure, Hannah. So, generally speaking a veteran would schedule an appointment with our office. Whether that appointment is face-to-face or virtual, that is up to the individual themselves, but appointments generally work best because it allows the CVSO to dedicate their undivided attention to each case's often very individualized and unique circumstances. So, while we do accept emergency walk-in cases for homeless or those who may be near a crisis, in these cases, what we do is we will take care of the immediate need, but it will more than likely result in a follow-appointment after we have either access to their claims file or the additional documentation that we need.

Zach: As Mike stated, we usually make a phone call or internet contact. Once that is done, we try to have our clients speak through an Assistant County Veteran Service Officer to assess their needs. Then Assistant CVSO will get the appointment with the appropriate County Veteran Service Officer. We base our off of where the client lives, so we have different CVSOs covering different regions, that way, they can build that rapport. We always build time into our workday schedules to be able to take on emergencies if they arise, but if someone walks in without a call or appointment, we'll definitely serve them if we can, but if we can't, we will do what we would have done over the phone and probably complete the initial steps to starting a claim or getting access to their records.

HOST: Sometimes, the first meeting can feel really overwhelming for a veteran. What can they expect to happen during that initial meeting?

Zach: That's a great question, and yeah, they definitely do a lot of times feel overwhelmed because it is a lot of information. In the initial meeting, they can expect that we are going to look at their whole situation, from conditions in the military to the present, and also even forecasting things out to the future to try to assess their needs, to include the time of their passing and beyond, what that looks like. We try to be as thorough on the first appointment as possible while also trying not to overwhelm them, which can be a difficult balance. If they come very well prepared, we might complete several things and discuss a variety of entities and organizations. If they don't come so prepared, we'll get them started as best we can, and then we will have some follow-up homework for our next appointment. But a lot of times during that first appointment what we are going to do is:

- Complete and submit a VA healthcare enrollment application
- Probably complete and submit an Intent to File and appoint a Veterans Service Organization as Power of Attorney just for VA claims purposes to the Veterans Benefits Administration

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- Most likely complete and submit a pre-need burial eligibility from the National Cemetery Administration
- Review what they did in the military and if there are any residual diseases or conditions that are a result of their service
- Look at any and all of their medical conditions just to see if they could possibly be related to their military service
- Discuss questions that they have or if anyone that is accompanying them, and they have questions, we are going to try to help them as well.

HOST: That sounds like a fantastic opportunity to look at the veteran's current and future needs; thank you for sharing. What are some services that you can directly provide? What options do you have if you can't offer a service? Mike, let's start with you again on this one.

Mike CVSOs generally will be the representation for all types of VA claims. This could include disability compensation, appeals to the Veterans Board of Appeals, education certificates, home loans, pre-burial determinations, headstone ordering, and so much more. Once you step out of that, the direct services are really going to vary greatly by locality. For example, when I say that, in my locality, my staff can also assist with emergency financial assistance and transportation to VA medical appointments, dental cleaning, and more. So, if we don't directly provide the service, the chances are very high that we know of a direct agency or nonprofit within the community that can assist. And again, that warm handoff or the connection we have within the local community is beneficial as the resource list continues to grow over time and for those who want to assist.

Zach: I agree that VA claims representation to the VBA is the most common service we directly provide. But also navigating most federal, state, or local agencies is another. In our office and in Ohio, we directly provide emergency financial assistance and transportation to medical appointments. If we cannot provide a service, we usually know of a nonprofit organization that can. In the worst-case scenario in which no known option exists, we will advise how the client on some possible approaches and maybe see if there isn't something that is a frequent situation.

HOST: Now we know that the relationships between agencies can be critical to veteran success. What are some of the key relationships you have with other agencies? How do you work with them to connect veterans for services? Zach, let's start this one with you this time.

Zach: Our DVOP is definitely an important relationship with our office. Our state college and community are another. We try to be a part of local nonprofit coalitions to stay in

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tune with critical information and relationships that are out there to meet our client's needs. Once a quarter, our office hosts a Veterans' Key Leader Engagement in which we bring in those we have relationships with. We bring them all to just get together and talk about what is going on within the veteran community. I give presentations and meet with any local group that would like to assist the veteran community.

Mike: As Zach said, relationships are the key to success. We work very closely with many communities and federal agencies. To name a few, I would say the two VA Medical Centers in our region, the local homeless and housing coalition, and the state veterans' office. Contact or two within a large medical center is extremely helpful when eligibility is wrongfully determined, or maybe there is a scheduling conflict. Participating in these homeless and housing committees, they've had added value with the pandemic and inflation that have had profoundly large impacts on the housing market. So, it enables us and gives us the ability to really assist in providing that basic shelter is essential for both the individual veteran and our community as a whole.

HOST: Great, thank you so much. We know that programs and services are often in flux, they are in a state of change. How do you stay on top of changes within agencies to ensure you have access to up-to-date services?

Zach: This is a tough one. I think it starts with having a good relationship with agencies so that they feel comfortable reaching out to us when things change for them. This is another intention of our Veterans Key Leader Engagement so that the different agencies can get together and make announcements to a room, so they don't have to repeat themselves to stay current and best serve our clients.

Mike: I think relationships and training. So having connections throughout the community, state and nation really opens the doors to different lines of communication. It may be something as simple as a newsletter with an update or an instant message to check in and ask if a program has changed. Lastly, the training keeps a CVSO on top of all changes and their access to the information. Often training has the ability to encompass members from different organizations, nonprofits, and other agencies and entities who are able to provide updates on old and new programs alike. It really gives the CVSOs time to come together and collaborate and compare notes and experiences in the same room.

HOST: In addition to building relationships with other agencies, the relationship you build with veterans is of course, absolutely critical. As you work to develop a relationship with a veteran, what steps do you take to review and identify the veteran's needs? Do you often find you can assist in areas other than what the veteran initially came in seeking support for? Mike, will you get us started on this one again?

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Mike: You know, Hannah, building a relationship and rapport with a veteran can take time. To best review and identify their individual circumstances, the CVSO first has to listen, but it is just as important the veteran has to communicate. So, while listening, an experienced CVSO often picks up on verbal and visual cues that might help to guide them in what the veteran's needs are. They might not be able to articulate the exact benefit or need, but a subtle mention of perhaps medication co-pays or difficulty in their personal life can help guide the conversation.

As a relationship is built, in many cases, the conversation just kind of takes us down additional paths, and often that is to other benefits and opportunities. In some cases, one service leads to another within the VA and state veterans' benefits programs. So, the CVSO really building a successful relationship is the veteran being comfortable and coming back for a follow-up and exploring those new doors that were not previously there and been opened.

Zach: I agree 100%, Mike, and I also find that one of the most important things when building relationships with veterans is to listen, like Mike said. Listen to them and their stories, give them some reasonable time constraints, of course, so you can also take care of business. But then I will also scan what is in the records to see if anything jumps out to me, just doing this also builds in some rapport with the veteran just because they see you care and you are looking into their stuff. Sometimes just that little step of reading is more than anyone has ever done.

So, I've found that a majority of the time, we end up assisting in areas other than what the veteran initially came in for. Often, a veteran has come in with information from a friend or source that either might not be 100% accurate or doesn't apply directly to them. So, once we start looking at records, we will ask them some questions, we'll find out what other things we should go for and apply for. This is great because it really clears things up for all the misinformation and gets that veteran understanding what their exact situation is to get them in front of the right agency for proper action.

HOST: Super informative; thank you so much! Now in your experience, which services have you found most beneficial, or that you find you provide the most, to veterans you work with? Zach, let's start with you this time.

Zach: In my experience, the services I've found most beneficial are a combination of employment support, often with the assistance of a DVOP, and the successful navigation of the VA's healthcare and benefits administrations. If these three things can get off to a good start or corrected as quickly as possible, usually veterans, their families, and our communities are going to thrive. There has to be a plan for some kind of emergency situation because these are going to happen. Often, this can include

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several agencies working in collaboration within our community to create and execute a good plan that can succeed.

Mike: For me, the last decade has proven time and time again that claims work, DVOP, and VA medical benefits are life-changing. A successful claim for someone can be a couple of things. It could provide self-ease that their disability is officially recognized. Maybe perhaps they are on a fixed income, and the monthly financial dollars now ensure that food is available on their table or that the lights stay turned on.

The DVOP to an underemployed veteran can be even more life-changing. Imagine waking up and now you're employed in an industry or area in which you can thrive in. So, the satisfaction that a veteran can get from being a productive member of his or her community is extremely valuable, both in terms of them as an individual and the local community itself.

And lastly, I mentioned the VA Medical benefits. It is surprising the number of veterans who either have no access to care or can't afford medical care. So just picture someone who has lived paycheck to paycheck; they self-dose their diabetic medication because they are balancing the medication costs with other basic necessities in life. So, something as simple as a VA healthcare enrollment could potentially save them \$4,000 annually in medication costs. Words can't even begin to describe how life-changing that can be. Just the words "thank you" from the veteran really let you know just how beneficial those services you are offering are.

HOST: Wow, that is really powerful; thank you so much for sharing that. We know that transitions are always a concern, and change is hard. How might services vary based on the veteran's state and county? Can you assist veterans with transferring services and support when they move?

Mike Transitioning, whether from the service or life taking us to another place, can be difficult, and change can be difficult for even the most experienced! Services are going to vary greatly, and it is sad to say that funding and support infrastructure plays a massive role in what is going to be available. Some states are set up on a state level, and others are structured more on a microscopic county level.

Zach: I've worked for two counties in Ohio and two in Texas. I can tell you that services can differ significantly between each state and county. Some states have better infrastructure for proper support to be proactive, and some are more of a reactionary base. Sadly, a lot depends on the infrastructure at the state and local levels. So, these variations can be from benefits provided to services delivered. So, some veterans transition a few times throughout their lifetime, and some have multiple places they can call home, so every veteran's situation is a little different. It's important to know where

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our clients are on this spectrum, it can often affect the approach to their healthcare or for their benefits from the various agencies that could be affected with their transition. Communication is the key and knowing when and where they will be transitioning can make things go much more smoothly. I'll tell transitioning clients to contact the county where they are going, or thinking of going, just to see what they might offer at the local and state levels. I've called on a client's behalf to help resolve difficult situations resulting from a tough transition, but I usually try to let the client handle as much of their situation as they can, as this usually has the best outcome and it also helps to empower them with their future situations.

HOST: The services you provide veterans are incredibly important; however, you don't just offer support for the veterans but also their families. How can your services help veterans' plans for the future and offer support to their families?

Zach: So, when clients come into our office, almost nothing is off the table for discussion. We have to talk about difficult things because not planning and not knowing what will happen will most often make things much more difficult things. So, some veterans and their families have never discussed what will happen once they pass. I bring this up every time because having a plan for a few scenarios will often lead to better outcomes for the survivors, to include having less stress during the time of a veteran's passing. Let's see what else, sometimes, the spouse or family member can provide details and support a veteran's claim or situation that the veteran couldn't recall or provide. So, we often have family members wanting to help their veterans in difficult times, but unless we have written permission from that veteran, we can't talk about specifics to the veteran's family about the client, but we can speak in generalities with the family members just so they have a general concept.

Mike: I agree, Zach, and I want to add that early communication and rapport with the veteran are essential. A helpless child or spouse often will have no idea that a benefit might be able to assist them. An often-difficult discussion with the veteran is pre-need burial predetermination or final wishes. And while those are challenging conversations to have, one of the best things we can do is help the family before a stressful event and an untimely passing is to have those discussions.

While we can also assist and support family members for certain types of claims, maybe even medical coverage. There really are no boundaries, and one will never know if we don't have a conversation. As we mentioned earlier, benefits change over time, so if assistance isn't available at the immediate time, it may be in the future.

HOST: It's clear you are making a very significant impact! What are some success stories you can share with us here?

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Zach The obvious success stories are clients that have had their VA claims denied, and we have appealed them, sometimes for several years, and eventually, they get granted that benefit which can result in several hundred thousand dollars to the client or survivor. I can think of cases where veterans have come back to me after dealing with physical and mental conditions, including being suicidal, in which they had almost given up until we helped them navigate their situation to get the benefits and resources they needed and deserved. I can also think of situations where veterans and their families faced or were homeless. We helped prevent them homeless or became housed and then watched them reintegrate back into society and lead productive lives, which is amazing. Another success is connecting highly functioning and successful veterans with appropriate agencies so that they can give back and support our veteran community, which everyone benefits from.

Mike: Over time, I think a CVSO builds relationships with the veterans within their local community. While the line of work can certainly have its periods of sadness and frustration for CVSOs, our ability to connect and continue serving is bountiful. I can think of plenty of success stories, but what is considered a success is measured differently from person to person. What I mean by that is I have witnessed a veteran in a mental health crisis walk across traffic to ask for help. As I mentioned earlier, VA healthcare may be a lifesaver for someone. Thinking back, a couple of months ago, I received an email from a daughter whose father had been recently released from rehab, but he couldn't perform the basic activities of daily living, and he wasn't enrolled in VA healthcare but he was eligible, and the enrollment and referral actually saved that veteran's life. When he arrived at the VA Medical Center, the doctors, thinking back, they undid his bandage and found a severe gangrene infection in his leg. Thankfully it was caught in time, and he retained his lower limb, which wouldn't have happened without that pass-off. And of course, there is that phone call where the bank called and said they need to withdraw money because they are only insured for \$250,000, that is definitely a life-changing event. CVSOs are really just thrilled to help a community member win their case, but examples like this can be life-changing. For someone who may have struggled their entire life financially to keep food on the table or maybe they never had reliable transportation, we've connected them to these benefits, and just contributed to them being a much better place.

HOST: Wow, thank you so much for sharing that with us today. This has been truly enlightening and so informative, and I am so glad we've been able to have you join us. As we come to the end of the podcast, as you look ahead at the current and future needs of veterans, how do you see your role as a CVSO or a DVOP changing in the coming years? Nathalie let's start with you.

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Nathalie: When we look into the future for CVSOs, it is really important to keep in mind the changing demographics of the United States and the veteran population. The all-volunteer force is almost 50 years old, and because of that, older generations of veterans are larger due to the use of the draft in the past. As the population of veterans shrinks in the coming decades, the role of CVSOs will change due to increased competition for resources among different government agencies, and there will be a lack of familiarity with veterans and their needs in communities. There will be an increased need to make a case for local veteran support.

Zach: I would say that our role as a CVSO continues to become a more proactive interaction in nature. We try to get the most accurate supporting evidence to the VA to support their claim and ultimately to get the best accurate and timely decision we can for our clients. So, I think this work will continue to increase as our relationship with the VA continues to be strengthened. This role is one that must always be flexible as the laws, regulations, and processes are ever-changing as well. The technology that is being developed is truly impressive, and as it is being implemented, it is going to mean that staying abreast of changes is going to be a constant for many years to come.

Mike: And I would just add that the CVSO's role in recent years has morphed into this more interactive role within their local communities. As the VA continues to improve its processes and the claimant becomes better armed with the resources around them in their local communities, the next 5-10 years are really going to be something to witness. It's my belief, personally, that probably the DVOPs and CVSOs are probably going to see an increase of 10-20% increase in the services we provide as we move into the future.

HOST: Mike, Zach, Nathalie, thank you so much for sharing these last words and for joining us today for this podcast. To our listeners, if you would like more information about serving veterans, please visit NVTI.org to access resources such as this podcast. We are constantly adding new material at NVTI.org, so do check back often. We also invite you to continue the conversation at Making Careers Happen for Veterans: Community of Practice. Thank you so much.

Outro: This podcast is brought to you by the National Veterans' Training Institute, whose mission is to further develop and enhance the professional skills of veterans, employment, and training service providers throughout the United States. This program is funded by the U.S. Department of Labor, Veterans Employment & Training Service and administered by Management Concepts. For more episodes, visit the NVTI website at www.nvti.org.