

Penn State Law Veterans and Servicemembers Legal Clinic
329 Innovation Park, Suite 118
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Fall 2018 Syllabus

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I. Introduction and Overview

A. Mission of the Clinic

The mission of the Veterans and Servicemembers Legal Clinic is to teach law students practical client representation skills including client interviewing and counseling, written and oral advocacy, case file management, and advanced legal research and analytical skills in an area of complex administrative law. Throughout the semester, our goal is to teach you to handle a variety of types of cases:

- We may help to alleviate a major backlog of veterans' disability compensation claims by handling disability appeal claims for veteran clients from Pennsylvania as well as other states.
- We may assist our local Penn State community (employees, alumni, and students) with veteran pension and education benefit appeals.
- We may assist veterans with discharge upgrade petitions to change the character of service assigned by their military units at discharge.
- We may work on policy matters, such as advocating for legislative or administrative law changes to veterans' benefits or writing an amicus brief on an issue important to veterans.
- We may work with the PA National Guard to teach them USERRA and SCRA benefits.

The Clinic has purchased Veterans Benefit manuals that will serve as part of our textbook materials this semester. We may also assign some reading of outside materials as .pdfs from other texts, including some essays from The Clinic Seminar by Deborah Epstein, Jane Aiken and Wallace Mlyniec. This book is really excellent but the essays are long. I have posted excerpts from The Clinic Seminar textbook in Canvas of all the essays from the key chapters (in my opinion) for your reference as you may find the reading very interesting. I can do this under copyright laws if I post no more than 20% of the book for educational purposes only. The articles are written by clinical law professors at other schools who have vast practical experience.

I may choose an essay from some of these chapters for use to discuss together. We won't do that right away in the semester as I first want to give you a chance to learn about the VA benefits system (or refresh your memory if you took the Veterans Benefits doctrinal course I offered in Fall 2017).

The key chapters from the book (in my opinion) are:

- "Client Counseling" Chapter excerpt (pp. 15-65)
- "Communication and Assumptions" Chapter excerpt (pp. 70-134)
- "Interviewing" Chapter excerpt (pp. 137-70)

- “Informal Fact Investigation” Chapter excerpt (pp. 223-80)
- “Collaboration” Chapter excerpt (pp. 404-25)
- “Establishing Professional Boundaries” Chapter excerpt (pp. 749-56)

Services for Clients

The classroom instruction and student work for the clinic usually focuses mainly on appealing disability, pension or education compensation claims denied by the U.S. Department of Veteran Affairs (VA) to the Regional Office (RO) or the Board of Veterans Appeals (BVA) or the U.S. Court of Appeals for Veterans Claims (CAVC).

Last spring, I mentioned that over the summer of 2018, I was hoping to create modules and mock exercises. Due to the workload of representing clients, preparing an advocacy article for AML for one client, and some family health issues, I was unable to do so. However, I do have course relief from teaching a second class with clinic this fall, to accomplish these tasks. By the end of September, I hope to have some of these materials ready to share to help with interviewing, document review, analysis and synthesis, and integration of legal research and analysis with document review and analysis.

B. Primary Clinic Objectives or Learning Outcomes (see also Appendix 1)

This list is very long, and these skills take years of practice to master, but we will focus on some of these skills, and help you to improve on your curve of professional development for these skills that will arc over time. I hope to have individual dialogue with each of you to talk about the skills that apply to the matters you are handling, and how you view your progress, and what I can do to assist you on your path.

1. Substantive and procedural veterans benefits and other veterans’ rights law knowledge
2. Development of practice-ready skills through:
 - a. Identifying potential claims and arguments
 - b. Reviewing and analyzing client files, including military and medical records
 - c. Locating evidentiary support for claims and arguments
 - Analyzing, locating and requesting documentary support, including medical exams, reports and opinions
 - Locating, contacting and interviewing witnesses, including medical experts
 - d. Researching to find case law to support claims and arguments
 - e. Interviewing and counseling clients
 - f. Negotiating and other forms of oral advocacy
 - g. Brief writing and other forms of written advocacy
 - h. Managing client files with proper security
3. Development of professional responsibility skills through:
 - a. Engaging in client-centered lawyering
 - Keeping the client well-informed
 - Making sure that the client is the key decision-maker, not the lawyer
 - b. Following ethical rules of practice
 - c. Using effective time management skills and timekeeping
 - d. Collaboration with other clinic students and supervising attorneys
 - e. Working effectively with opposing counsel and other adversaries

II. Instruction

A. *Weekly Classroom Sessions*

We will meet once a week as a group for approximately two hours, on Tuesdays, in the large conference room at the clinic, from 8:45 to 10:45 a.m.

We may also meet for individual and/or small group meetings for approximately one to two hours a week. Those meetings will likely come up as needed, and may not even need to be scheduled. They can occur naturally as you come to work in the clinic space. Barring faculty meetings and events in Katz or meetings with the VA or nursing to set up a joint outreach program for Spring 2018, I will generally work in the clinic space every day from about 9 a.m. to 4 p.m. (On Tuesday class days, I will arrive by 8:30 a.m. for class to begin at 8:45 a.m.)

In the large group meetings, we will discuss the pending cases students are working on, including a discussion of the issues and the law, problems students are resolving, and the strategy of how to move the case forward. Each clinic member will share information about the research, analysis and written or oral advocacy work that the clinic member has undertaken for the client file since the last weekly meeting. Time permitting, we will discuss and learn about substantive areas of the law pertinent to the cases we are working on individually or together. We may use exercises and simulations, depending upon your work load, and your interest.

In addition to your case file assignments, I may assign reading concerning lawyering skills and/or substantive and procedural veterans law for class discussion and/or background materials about a veteran's case that the clinic is currently handling. I will post these reading assignments with at least one week's notice, and I will send an announcement to notify you that the reading has been posted to Canvas. If our veteran case files and/or policy projects like the National Guard educational work keep us very busy, then we will likely focus most of our learning on those matters. I have made a folder for each week in the course in Canvas, mostly because I like you to submit weekly memos to me and this gives you a place to put them where I can review them all at once and return comments very efficiently. I will also ask you to email them to me and Leah because Leah, unfortunately, as a volunteer, is unable to access Canvas.

B. *Additional Sessions and Time Spent Working Outside of Class*

When not in class or an individual meeting with Professor Vollmer or Leah Davis, you will be working on client cases, meeting with clients, doing outreach or other policy work. When we have briefs coming due, or meetings with clients or witnesses, we may need to meet more often.

Under ABA Standard 310, for each credit earned in a law school course, a student should spend an hour in instruction and two hours in outside classroom work. Students earn 4 credits for this course which means that students are expected to work the equivalent of 12 hours per week for 15 weeks totaling *a minimum of 180 hours of work for the semester*.

Class attendance, participation in individual and group meetings, and outreach, as well as all reading for the class, including emails or announcements, count toward your semester commitment. Please account for your time in the Weekly Agenda as shown in Appendix 2.

To earn a B grade in this course, a student will have to work, and account for, the minimum 180 hours of work during the semester and meet all of the other requirements for a B grade noted in

the grading section of the Clinic Handbook.

To earn a B+ or higher grade, students will likely need to work, and account for, more than 180 hours of work during the semester. The exact number is difficult to provide as earning grades of B+ and above in the clinic is also dependent upon the quality and efficiency of the work produced. As I explain in the grading section of the Clinic Handbook, clinic grades of A and A- are rarely awarded, and are awarded only for exceptional work.

Generally speaking, I prefer that you split the *minimum of 180 hours of work for the semester* equally over the 14 weeks we are together and work for *at least 13 hours per week for 14 weeks*. However, our work in the clinic is professional and involves real cases with actual clients. The ethical obligation to represent the clinic's clients extends to you and we will all need to work together to timely meet all deadlines for our clients. Meeting those deadlines and client expectations may mean that you will need to work more than the minimum 13 hours per week. Because we are simulating a law firm, you should think of each hour as *billable* hour that you would charge to a client. If you are not working efficiently, you should not count all of that time as *billable*. Likewise, if you need longer than most new attorneys would need to complete tasks such as research or writing, you likely should not count all of that time as *billable* – and you should talk to me privately about how you are accounting for your time. In those instances, you may be expected to work more than 13 hours per week to meet your deadlines and accomplish your assigned tasks.

III. Outreach

Outreach is particularly important to our clinic. In addition, public service is an important part of our professional responsibility as practicing attorneys to contribute to our local communities. Public service and outreach are also excellent ways in practice to obtain referrals and networking contacts, and to enhance your reputation in your local community.

IV. Self-Reflection and Self-Assessment, and Possible Peer Assessment

I will ask you to reflect upon your learning from representation of clients in the clinic because self-reflection is a critical part of the practice of law and effective client representation. In the middle of the semester, and at the end of the semester, I will also ask you to assess your performance in the course, and how well you have contributed to the student learning goals that we jointly decided you wanted to focus on.

V. Timekeeping

As mentioned above, for Fall 2018, time will be accounted for in the Weekly Agenda. *See* the sample in Appendix 2.

VI. Grading Criteria

This course is a graded with one letter grade at the end of the semester, as a four-hour course, based on the following broad criteria:

- Participation
 - Regular class attendance
 - Regular attendance at other meetings or conference calls

- Outreach participation
- All other activities scheduled by the clinic and deemed required
- Client Representation Activities (graded on quality, professionalism, timeliness & efficiency)
 - Interviewing skills
 - Research skills
 - Analysis skills
 - Verbal and written advocacy skills
 - Record review to find supporting evidence skills
 - Correspondence including emails and letters, including quality and timeliness
 - File maintenance including preparation of memos to the file when needed
 - Adherence to clinic policies & professional standards & responsibility
 - Management of internal and external deadlines
 - Effective collaboration

For more specific guidelines, please *see* Appendix 1, and the Clinic Handbook.

Participation in a clinic, just like the actual practice of law, requires hard work. Ethical obligations require attorneys to work hard on every case, and we expect you to fulfill that obligation. At the end of this course, you may feel that you have worked harder in this course than in any other course in law school. While we appreciate and recognize the effort you will put in, hard work alone does not guarantee an “A” grade. Hard work is a minimum requirement for all clinics. An “A” is an honors grade, which is given for extraordinary performance. *See* the Clinic Handbook for more information.

VII. Accommodation Statement

Penn State welcomes students with disabilities into the University’s educational programs. Every Penn State campus has an office for students with disabilities. The Student Disability Resources Web site provides [contact information for every Penn State campus](#). For further information, please visit the [Student Disability Resources Web site](#).

To receive consideration for reasonable accommodations, you must contact the appropriate disability services office at the campus where you are officially enrolled, [participate in an intake interview, and provide documentation](#). If the documentation supports your request for reasonable accommodations, your [campus’s disability services office](#) will provide you with an accommodation letter. Please share this letter with your instructors and discuss the accommodations with them as early in your courses as possible. You must follow this process for every semester that you request accommodations.

VIII. Counseling and Psychological Services Statement

Many students at Penn State face personal challenges or have psychological needs that may interfere with their academic progress, social development, or emotional wellbeing. The university offers a variety of confidential services to help you through difficult times, including individual and group counseling, crisis intervention, consultations, online chats, and mental health screenings. These services are provided by staff who welcome all students and embrace a philosophy respectful of clients’ cultural and religious backgrounds, and sensitive to differences in race, ability, gender identity and sexual orientation.

Counseling and Psychological Services at University Park (CAPS): 814-863-0395

Penn State Crisis Line (24 hours/7 days/week): 877-229-6400

Crisis Text Line (24 hours/7 days/week): Text LIONS to 741741

IX. Educational Equity Statement

With the Pennsylvania State University, I am committed to and accountable for advancing diversity, equity, and inclusion in all of its forms. With the University, I embrace individual uniqueness, will foster a culture of inclusive excellence that supports both broad and specific diversity initiatives, will leverage the educational and institutional benefits of diversity, and will engage all individuals to help them thrive. With the University, I value inclusive excellence as a core strength and an essential element of our public service mission.

With Penn State:

- I will foster and maintain a safe environment of respect and inclusion for faculty, staff, students, and members of the communities we serve.
- I will ensure fair and inclusive access to our facilities, programs, resources, and services, and ensure that all of our policies and practices are inclusive and equitable.



Penn State takes great pride to foster a diverse and inclusive environment for students, faculty, and staff. Acts of intolerance, discrimination, or harassment due to age, ancestry, color, disability, gender, gender identity, national origin, race, religious belief, sexual orientation, or veteran status are not tolerated and can be reported through Educational Equity via the [Report Bias webpage](#) or contact one of the following offices:

University Police Services, University Park: 814-863-1111

Multicultural Resource Center, Diversity Advocate for Students: 814-865

1773 Office of the Vice Provost for Educational Equity: 814-865-5906

Office of the Vice President for Student Affairs: 814-865-0909

Affirmative Action Office: 814-863-0471

*Dial 911 in cases where physical injury has occurred or is imminent

CLINIC - CLASS SCHEDULE

***The topics and readings posted below are subject to change due to case needs, etc. We may need to cover a certain topic earlier, skip a topic, or add topics, depending upon what happens in the cases we are handling, and the clinic deadlines you have.**

All meetings will be in the Large Conference Room of the clinic space in the 329 Building from 8:45 a.m. to 10:45 a.m. unless otherwise noted.

Week 1

Wed., Aug. 15 (3:15 – 4:30 p.m.) - Introduction to the Clinic & Clinic Policies & Assigned Work for the Semester

- No prior reading is assigned
- We will also brainstorm for Constitution Day

Week 2

Tues. Aug. 21

- Introduction to veterans' disability, pension and education compensation claims
 - The structure of the VA system
 - Where are claims filed and appealed
 - Introduction to VA disability benefits laws
 - Assigned Reading:
 - Veterans Appeal Process Diagram in Canvas
 - Selected pages from the Veterans Affairs Law textbook (pp. 17-21)
 - James D. Ridgway article, "A Benefits System for the Information Age"
 - Clinic policy documents on Canvas (re file retention, client conflicts, and communications)

Week 3 (Aug. 28): Class topics, time & location TBD (e.g., cross cultural lawyering)

- On Aug. 30, I will travel to the Altoona VA to meet with an existing client around noon. Any student is welcome to join me.
- For this reading, instead of the text mentioned above in the general comments section, I will likely assign Ch. 2 from a West textbook on client interviewing and counseling called Lawyers and Clients.

Week 4 (Sept. 4): Class topics, time & location TBD (e.g., client interviewing & client counseling)

- For this reading, instead of the text mentioned above in the general comments section, I will likely assign parts of Chs. 3 & 4 from the West textbook on client interviewing and counseling called Lawyers and Clients (mentioned for Week 3). We can compare mock interview transcripts with a sophisticated client, an adolescent client, and a client with an intellectual disability. We can also read about how to interview clients with psychosocial or mental disorders. My goal is to bring in a speaker later in the semester to talk to us more

about this important topic.

Week 5 (Sept. 11): Class topics, time & location TBD (e.g., medical record review)

Week 6 (Sept. 18): Class topics, time & location TBD (e.g., client communication)

Week 7 (Sept. 25): Class topics, time & location TBD (e.g., informal fact investigation)

Week 8 (Oct. 2 week): Class topics, time & location TBD (e.g., collaboration on legal teams)

Week 9 (Oct. 9 week): Class topics, time & location TBD (e.g., military record review)

Week 10 (Oct. 16 week): Class topics, time & location TBD (e.g., record requests)

Week 11 (Oct. 23 week): Class topics, time & location TBD (e.g., brief writing & editing)

Week 12 (Oct. 30): Class topics, time & location TBD (e.g., VA & BVA hearings & oral argument)

Week 13 (Nov. 6): Class topics, time & location TBD (e.g., setting professional boundaries & goals for your professional development in the future)

Week 14 (Nov. 13 – Nov. 20): finish all work on files; write work transition memos, if appropriate; wrap-up class

Note: Nov. 26 is the last day of law school classes for the semester

Appendix 1

1. Professional Habits and Ethical Obligations

- a. ***Did the student act like the attorney on the client matter, and differentiate this experience from other task oriented positions the student may have had in the past? Did the student change his or her perspective from turning in an assignment and expecting a supervisor to complete it, to taking responsibility for the final product and its completion?
- b. Did the student take responsibility for all aspects of managing the client matter, such as analyzing the next steps to take in the client's matter and then discussing proposed next steps with a clinic supervisor, take the initiative to implement the next steps agreed upon with a clinic supervisor, meet deadlines, and follow through with the client matter until the semester ends?
- c. ***Did the student read all emails from clinic supervisors thoroughly and respond timely and appropriately?
- d. Did the student perform casework in a **reliable, timely, thorough** manner?
- e. Did the student keep the case and its file **organized and up-to-date**, and make appropriate use of time management and filing systems?
- f. Was the student **thoroughly prepared** for all professional meetings?
- g. Did the student's arguments, examinations, and evidentiary decisions **demonstrate an understanding** of the facts, theory of the case, law, and applicable rules and procedures?
- h. Did the student **take the initiative** in raising issues, researching and strategizing?
- i. Did the student **prioritize client** work and take clinical responsibilities seriously?
- j. Was the student **open to feedback** and critique?
- k. Did the student **reflect critically** on his or her own performance, and learn from feedback and from his or her own reflections?
- l. Was the student willing to **experiment** with new ways of doing things?
- m. Did the student **handle mistakes** properly, including taking responsibility, immediate action, and reflecting on the mistake?
- n. Did the student maintain **respect for the client** at all times?
- o. Did the student **interact effectively** with adversaries, court personnel, and other institutional participants or players?
- p. Did the student show respect for and collaborate effectively with **other clinic students and staff**?
- q. Did the student identify, analyze and properly handle applicable **ethical issues** when they arose, including keeping the supervisor informed?

2. Fundamental Lawyering Skills and Values

- a. Did the student effectively **interview** clients and witnesses?
- b. Did the student effectively **counsel** clients?
- c. Did the student demonstrate sufficient **listening** skills?
- d. Did the student do sufficient **legal research** to identify all appropriate theories?
- e. Did the student perform effective **factual investigation**?
- f. Was the student **creative and determined** in their pursuit of factual information for their cases?
- g. Was the student's **writing** precise, clear, concise, and well edited?
- h. Did the student's written advocacy **advance immediate and long-term objectives**?
- i. Did the student **negotiate** effectively?
- j. Was the student **fully prepared** for any client meetings, phone conferences or hearings?

- k. Did the student's oral advocacy possess the **appropriate content, delivery, organization and narrative**?
- l. Did the student convey the **proper tone and level of respect** during her oral advocacy?
- m. Did the student **appropriately respond to the fact finder's questions**?
- n. Did the student act in ways to **promote justice and fairness**?
- o. Did the student regularly **attend class**?
- p. Did the student **participate** frequently in case rounds and class discussion?
- q. Did the student do all assigned **reading and exercises**?
- r. Did the student prepare for and participate effectively in **simulations**?

3. **Critical Thinking and Professional Judgment**

- a. Was the student able to synthesize factual and legal information to form an appropriate **theory of the case**?
- b. Was the student able to properly identify **issues of fact and law**?
- c. Did the student anticipate and respond to **adverse legal and factual arguments**?
- d. Did the student engage in thoughtful, informed, reflective **strategic decision making**?
- e. Was the student able to recognize and appropriately address **complex situations**?
- f. Did the student exercise sound **professional judgment**?
- g. Is the student able to sufficiently **critique** his or her own performance?
- h. Was the student able to appropriately **evaluate** the strength of their cases?
- i. Did the student help clients **make well-informed decisions**?
- j. Did the student actively **critique the systems** within which the student operated?

4. **Successful Implementation of the Components of Client-Centeredness and Cross Cultural Competence**

- a. Did the student use appropriate **listening skills**?
- b. Did the student develop the ability to **adjust plans** based upon clients' responses?
- c. Was the student able to identify **similarities and differences** between the student and the client, and between the client and the decision maker (i.e., the judge)?
- d. Was the student able to identify **alternative interpretations** for client behavior?
- e. Did the student develop a client narrative from a **strengths-based or empowerment** perspective?
- f. Was the student able to **engage the client** in identifying appropriate options for resolving the client's problem?
- g. Did the student explain legal concepts using **non-legal language**?
- h. Did the student examine his/her own **assumptions and personal biases**?
- i. Did the student practice **client-centered lawyering**?
- j. In counseling, interviewing and advocating for the client, did the student **identify, process and validate the client's concerns and priorities**?
- k. Did the student **implement advocacy strategies that incorporated the client's concerns and priorities**?

Appendix 2: Sample Weekly Agenda (showing 16 hours of work)

[Attribution Credit & Thank you to Prof. Hugh McClean, Director of the Bob Parsons Veterans Advocacy Clinic at Univ. of Baltimore School of Law who created this Agenda/Task List]

Weekly Supervision Agenda/Task List Memo

TO: Team Members and Supervisor
FROM: Susy Smith
DATE: August 20, 2015
RE: Agenda for August 21, 2015 Team Meeting

Time spent in class on August 14: 2 hours

Time spent reading for Aug. 14 class: 1 hour

Client #1: Mr. Buck Johnson

Goal 1: Increase disability rating for PTSD from 30% to 50%

Due 9/15: Complete Case Planning Chart

Due 10/15: Draft #1 of brief in support of claim

Due 10/23: Draft #2 of brief in support of claim

Due 10/30: Submit claim to VA

Goal 2: File new claim for hearing loss

Due 9/15: File Notice of Claim

Due 10/15: Collect evidence to support claim

Due 10/30: Draft #1 brief in support of claim

Due 11/7: File claim

- TASKS ACCOMPLISHED LAST WEEK (include hours spent)
 - Reviewed retainer agreement and verified counseling is within scope of agreement (0.5 hours).
 - Researched procedure for increasing disability rating for Post-Traumatic Stress Disorder (1.0 hours).
 - Requested supporting medical documentation from Mr. Johnson's primary care physician (1.0 hours).
 - Drafted memo on procedures for increased disability rating for PTSD (2.5 hours).
 - Prepared Agenda (1.0 hour).
 - Attend supervisor meeting on case (1.0 hour).
- AGENDA FOR SUPERVISION/QUESTIONS
 - I have not been able to obtain an affidavit from Mr. Johnson's witness. How do I best accomplish this? What are the next steps?
 - We have requested a status update from the local VA office but have not received an answer in more than 6 months. How do we obtain an answer from the VA?
 - My client will not come to Baltimore for a psychological evaluation because large cities trigger his PTSD symptoms. How do we obtain a mental health evaluation without upsetting the client?
 - Mr. Johnson will not return my calls. I need to reach my client to continue work on this case. How can I contact my client?
- TASKS TO DO THIS WEEK
 - Contact witnesses and obtain affidavits from Mr. Johnson's witnesses.

- Draft memo requesting an increased disability rating for PTSD.
- Meet with supervisor to discuss/review increased disability rating memo.

Client #2: Ms. Julia Gulia

Goal 1: Increase disability rating for depression from 30% to 50%

Due 9/15: Complete Case Planning Chart

Due 10/15: Draft #1 of brief in support of claim

Due 10/23: Draft #2 of brief in support of claim

Due 10/30: Submit claim to VA

TASKS ACCOMPLISHED LAST WEEK

- Reviewed transfer memo and research in case file (1.5 hour).
- Researched procedure for appealing an adverse initial rating decision (2.5 hour).
- Requested claims file from the VA (0.5 hour).
- Attend student group meeting on case (1.0 hour).
- **AGENDA FOR SUPERVISION/QUESTIONS**
 - There are multiple forms for obtaining records from the VA. Which should we use?
 - I completed my research for appealing an adverse initial rating decision. Is it better to file the Notice of Disagreement (NOD) now or wait for Ms. Gulia's medical evaluation so we can include her evaluation result in the NOD?
 - Ms. Gulia has other potential claims. Can we represent her on those claims?
- **TASKS TO DO THIS WEEK**
 - Complete NOD and draft memo in support of NOD.
 - Meet with client to discuss further claims related to service-connected disabilities.

Policy Project: Maryland Veterans Education and Training Center

Due 9/15: Establish planning meeting schedule with MCVET

Due 10/15: Draft #1 of Presentation

Due 10/23: Moot Presentation to MCVET

Due 10/30: Submit Counseling Assignments and Schedule to Hugh

- **TASKS ACCOMPLISHED LAST WEEK**
 - Contacted MCVET and discussed availability of personnel for meetings (0.5 hour).
- **AGENDA FOR SUPERVISION/QUESTIONS**
 - What is the best format for the presentation?
 - What resources should we include in the presentation?
 - What topics should be included?
- **TASKS TO DO THIS WEEK**
 - Meet with supervisor to discuss formats for presentations, and specifically whether we should use PowerPoint.
 - Contact MCVET to ask about A/V equipment.

Appendix 3: Sample Claims Summary

Joe Veteran Summary of Claims

Document Requests:

- 7/29/14 C-File requested
- 7/29/14 Medical records requested
- 7/29/14 Military personnel file requested
- 9/4/14 Medical records received
- 10/1/14 C-File received
- 12/9/14 Military personnel file received

You should have requested client's C-File, Medical Records, and Personnel Records. Record when you requested and received these records.

PTSD: Service Connected with 30% rating

- 2/27/12 claim filed at Baltimore VARO
- 7/5/12 claim denied
- 1/16/2013&6/18/2013 statements in support of claims filed
- 6/18/13 NOD filed
- 3/26/15 VA Form 21-0781 submitted to VA Evidence Intake Center
- 5/14/2015 claim granted for service-connection with 30% rating

Name the disability and service connection rating. Record all significant filing dates and responses from the VA.

Left Foot Pain (USC 1151)—WE DO NOT REPRESENT VETERAN ON THIS CLAIM

- 12/21/12 claims filed
- 8/16/13 claims denied
- 4/29/2013 statement in support of claim filed
- 7/29/14 NOD filed
- 2/24/15 DRO requested
- 3/26/15 DRO hearing requested

List all client's claims, including claims on which we do not represent client. Designate that we do not represent client on these claims.

TDIU Not currently service-connected

- 1/16/2013 claim for increased compensation based on unemployability
- 8/12/2013 claim denied
- 7/29/2014 NOD filed; DRO hearing requested

If client is not currently service-connected, designate as such next to disability.

Multiple Non-Compensable Service Connected Injuries

- 12/21/12 claims filed
- 8/16/13 claims denied
- 4/29/2013 statement in support of claim filed
- 7/29/14 NOD filed
- 2/24/15 DRO requested
- 3/26/15 DRO hearing requested

List client's total disability rating for all claims, including claims for which we do not provide representation.

Current Total Disability Rating: 30%