

Office of Administrative Review

Scheduling and Conducting Informal Conferences



Purpose

This Tip Sheet provides helpful information, references and high-level instructions for scheduling and conducting informal conferences for higher-level reviews.



Audience

All claims processors responsible for scheduling and conducting informal conferences.



References

- 38 C.F.R. § 3.2601(h), *Informal Conferences*
- M21-5, 5.3, *Requests for Informal Conferences*

Tips

Review block 16 of VA Form 20-0996, *Decision Review Request: Higher-Level Review*, to determine if

- the claimant, or his/her representative, requests an informal conference, and
- the claimant would like VA to contact his/her representative to schedule the informal conference using the below table:



| If... | Then... |
|---|--|
| Block 17 of the VA Form 20-0996 lists a representative or POA's specific contact information | Contact the listed representative or POA, <i>not the claimant</i> , to schedule the informal conference. |
| Block 17 of the VA Form 20-0996 <i>does not</i> list specific contact information for the representative or POA (i.e., it is blank, or the telephone number is missing) | Contact the claimant to schedule the informal conference. |
| Block 17 of the VA Form 20-0996 lists a generic Veterans Service Organization (VSO) or representative's office and no specific contact information (i.e., 'DAV' or 'VFW') | Contact the claimant to schedule the informal conference. |

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Important Reminders

- If specific POA or representative contact information is listed on VA Form 20-0996 do **not** bypass the POA or representative by contacting the Veteran directly
- VA does **not** require employees to conduct a search for POA information; the contact information **must** be on the form
- Employees **must** verify POA is an authorized representative by ensuring VA Form 21-22/21-22a is of record
- Conduct [OGC accreditation database](#) search, if necessary
- Do **not** contact an unaccredited POA; instead, call the claimant directly to schedule



Other Resources

- Training, VA 4564283, *AMA Informal Conferences*
- Training, VA 4564453, *Scheduling Informal Conferences*