

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*