

Client Requested Letters Participant Guide



Public Contact Team CRM/UD-O Training

February 2022

Client Requested Letters

References: KM ARTICLE

- [Centralized Mail Processing Initiative - Background Information and FAQs](#)
- [State Benefits for Veterans and Dependents](#)
- [Commissary and Exchange Eligibility](#)
- [Patronage Expansion](#)
- [0820 Routing Procedures](#)
- [Death Related Information Checklist](#)
- [Non-Emergency Emails & Coordinator Referrals](#)
- [Encrypted Email of eFolder Documents & PCR-Generated Letters Job Aid \(va.gov\)](#)

MANUAL

- [M21-1MR, XIII.ii.2.A, Civil Service Veterans' Preference Letter](#)
- [M21-1MR, IX.ii.2.7, Rating Determination for Veteran's Civil Service Disability Preference](#)
- [M21-1MR, II.ii.3.1.a, General Policy for Jurisdiction Over Claims](#)
- [M27-1, I.5.4, Correspondence](#)

FORMS

- SF15 - [Application for 10-Point Veteran Preference](#)
- DD Form 1172-2 - [Application for Identification Card/DEERS Enrollment](#)

Lesson Content

Client Requested Letters

Clients (Veterans, beneficiaries, dependents, etc.) request various letters from VA. Many of these letters provide clients access to additional benefits, with the requested letter serving as the proof of eligibility. As advocates for Veterans and beneficiaries, Public Contact Representatives (PCRs) are responsible for determining a client's eligibility to receive requested letters utilizing the CRM/UD-O system.

It is important that you familiarize yourself with the letters that are available in the CRM/UD-O system and fully understand the eligibility requirements for certain letter types.

The CRM/UD-O system contains many letter types that can be utilized to meet the needs of clients. Some of the most commonly used letter types are provided below:

- Amount Letter – compensation, pension, dependency and indemnity compensation, survivor's pension
- Commissary Letter
- Disability Breakdown Letter
- Preference Letters
- Summary of Benefits Letter – Veteran

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- Summary of Benefits Letter – Surviving Spouse

Each letter contains content that is specific to the letter type, but the content can be edited to add or remove content to meet the client's needs. It is important that PCRs select the letter that most appropriately meets the needs of the client as it is not efficient to create a personalized letter for each client.

Creating Letters

When creating letters, the VA has provided guidance on how each correspondence is mailed out. You will be creating letters based on the approved language and formatting as defined in [M27-1, Part I, Chapter 5, Section 4, Correspondence](#).

PCRs should review letters in their entirety to ensure all the information from the salutation to the return address is correct. Review the system of record to verify completeness and accuracy.

Department Of Veterans Affairs
810 Vermont Ave NW
Washington, DC 20420

Date of Request: January 24, 2017

Name & Address of Requestor: EMMETT BROWN
3424 ELDER ST
HILL VALLEY CA 91103

Employee ID with Station Number: 101/27/VBJ
C 00 000 000
BROWN E

VA File Number or SSN: 101/27/VBJ
C 00 000 000
BROWN E

Correct Salutation and Name of Requestor: Dear Emmett Brown,

This letter from the Department of Veterans Affairs certifies that Emmett Brown is receiving Service Connected Disability Compensation.

The current benefit paid is as follows:

Gross Benefit Amount	\$654.12/mo.
Net Amount Paid	\$554.12/mo.
Effective Date	12/1/2016
Percent Disability	40%

Station of Jurisdiction

When referencing different benefits, it is important to know the station of jurisdiction. Ensure the correct return information is on each letter in accordance with KM Article [Centralized Mail Processing Initiative - Background Information and FAQs](#).

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Do You Have Questions or Need Assistance?
If you have any questions, you may contact us by telephone, e-mail, or letter.

If you	Here is what to do.
Telephone	For Compensation, call us at 1-800-827-1000. If you use a Telecommunications Device for the Deaf (TDD), the number is 711. For Pension, call us at 1-877-294-6380.
Use the Internet	Send electronic inquiries through the Internet at https://iris.va.gov .
Write	Put your full name and VA file number on the letter. Please send all correspondence to the address below: <div style="border: 1px solid red; padding: 5px; text-align: center;">Department of Veterans Affairs Evidence Intake Center PO Box 4444 Janesville, WI 53547-4444 Toll Free FAX: 1-844-531-7818 Local FAX: 248-524-4260</div>

With sincere regard for the Veteran's service,

RO Director
VA Regional Office

Generic Closing

To email us visit <https://iris.va.gov>

Intake Center Address and Fax Number

A note is required

PCRs must ensure a note was made in the beneficiary's file. If a letter is sent **anywhere other** than the address of record or the letter was altered in any way, the PCR must include these details in the note.

Upload Letter in VBMS for Centralized Printing

See VBMS Upload Instructions attachment within KM Article: [0820 Routing Procedures](#).

Send the letter via encrypted email

See [Job Aid for Emailing Documents](#)

Types of Letters

Benefit Confirmation Letters

Benefit confirmation letters verify the monthly benefit amount, disability rating, and/or type of benefit a beneficiary receives. As PCRs, you should use your active listening skills to determine what type of letter is needed.

Examples of when a benefit confirmation letter may be needed:

- Housing authority may need to adjust a resident's rent based on their income.
- Beneficiary needs to provide proof of VA benefits for Social Security entitlement.

Clients generally ask for this letter by stating:

- "I need a letter that shows proof of my income."
- "I need proof that I'm receiving VA disability."
- "I need an award letter for my pension benefits."

Note: Benefit confirmation letters are commonly called award letters.

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Income Amount Letter

These letters verify amount the Veteran or beneficiary receives from the VA each month. These letters may also include information on the type of benefit received.

Note: Some requestor's do not want to disclose more information than necessary. Clarify if the dollar amount, disability rating, or type of benefit is necessary (compensation, pension, DIC).

Gross Amount Letter

This letter refers to the amount the Veteran or beneficiary is entitled to each month before possible deductions. It depicts the gross benefit amount, amount paid, and effective date of benefit, and disability rating.

Note: For beneficiaries receiving pension benefits, this letter will state the type of pension benefit, i.e. non-service connected (NSC) pension or survivor's pension.

Multiple Payment

Provides specified dates and the amount received from the VA and confirms the gross monthly amount the beneficiary is entitled.

Veteran Percent

Provides the Veteran's service-connected disability rating, and confirms the benefit received is for a service-connected disability. Dollar amount is **NOT** provided on this letter.

Disability Breakdown

This letter provides a breakdown of each service-connected disability, to include individual ratings, description of the disability, diagnostic code, and total combined rating.

No Benefits

Confirms an individual is not receiving monetary benefits currently, including dependents of a beneficiary.

Service Verification Letters

Statement of Service Letter

This is NOT a confirmation of benefits; *however*, it does display a Veteran's Branch of Service, dates of service (EAD and RAD), and Character(s) of Discharge for all verified service periods.

To generate a service verification letter, the following information must be verified in VA systems:

- All the service information including Entry on Duty (EOD) and Release from Active Duty (RAD) dates, branch of service, character of discharge, and separation reason,
- Character of service must show "HON" or "UHC,"

Note: The service verification letter states that the Veteran is "honorably" discharged. For VA and Office of Personnel Management (OPM) purposes,

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discharges of Honorable (HON) and Under Honorable Conditions (UHC) count as being "honorably" discharged.

- Branch of service code is not "ARNG" or "ANG,"
- Separation reason is "SAT," and
- If the Veteran's RAD is prior to June 1, 1968, there is a "Y" in the VER field, or
- If the Veteran's RAD is June 1, 1968, or later there is a "Y" in either the VER field or VADS field.

Summary of Benefits

State and other benefits may be available to Veterans and their dependents. The primary purpose of Summary of Benefits Letters is to provide state and other benefits to qualifying Veteran's and survivors; however, some states require state or station specific letters.

For the Veteran

Provides personal claim, military, and VA Benefit information, including:

- Whether the Veteran has a service-connected disability
- Veteran's combined service-connected evaluation percentage
- Current monthly award amount
- Veteran's entitlement to a higher level of disability due IU
- Veteran considered to be P&T due to SC disability(ies)
- Veteran is SC for loss of or loss of use of a limb, or is totally blind in or missing at least one eye
- Veteran received Specially Adapted Housing and/or Special Home Adaptation grant

For a Surviving Spouse

Provides personal claim information, military information (for the deceased Veteran), and VA Benefit information, to include:

- The benefit the surviving spouse is in receipt of
- If the Veteran died on active duty
- If the Veteran died as a result of a service-connected disability
- If the Veteran was considered permanently and totally disabled at the time of death

State Benefit Letters

See KM Articles: [Returned Calls, State Letters, VRE, & Coordinator Referrals \(va.gov\)](#) and [State Benefits for Veterans and Dependents](#)

Civil Service Preference Letters

Eligible Veterans of the Armed Forces have been given preference to all appointments in the competitive service when applying to Federal jobs. Recognizing their sacrifice, Congress enacted laws to prevent Veterans seeking Federal employment from being penalized for their time in military service. This preference

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does not guarantee Veterans jobs and it does not apply to internal agency actions, such as promotion, transfers, reassignments, and reinstatements.

For more detailed information, visit:

- www.fedshirevets.gov
- [Veterans Guide for HR Professionals, Veteran Services](#)

When preference is of issue, PCRs must verify eligibility, and provide the applicable Preference Letter alongside a [Standard Form 15, Application for 10-Point Veteran Preference](#).

Note: *To date, the most recent revision of the SF15 is dated October 2013. Previous versions required the applicant's signature. Applicants no longer need a signature.*

[M21-1, Part XIII, Subpart ii, Chapter 2, Section A - Civil Service Veterans' Preference Letter](#) provides in further instruction on eligibility requirements.

Veteran with No SC Disability

Certifies the Veteran served on active duty and was separated under honorable conditions from the Armed Forces with no service-connected disabilities.

Veteran with 0% Rating

Certifies the Veteran served on active duty and was separated under honorable conditions from the Armed Forces. The records further disclose the existence of service-connected disability(ies) which are less than 10 percent disabling.

Veteran with 10-20% Rating

Certifies the Veteran is entitled to compensation for service-connected disability(ies) rated at least 10 percent, but less than 30 percent. This payment is made in accordance with public laws administered by the Department of Veterans Affairs. Our records indicate the Veteran served on active duty in the Armed Forces, and was separated under honorable conditions.

Veteran with Greater than 30% Rating

Certifies the Veteran is entitled to compensation for service-connected disability(ies) rated at 30 percent or more. This payment is made in accordance with public laws administered by the Department of Veterans Affairs. Our records indicate the Veteran served on active duty in the Armed Forces, and was separated under honorable conditions.

Purple Heart Recipient

Certifies the Veteran is the recipient of the Purple Heart Medal, served on active duty in the Armed Forces, and was separated under honorable conditions.

Non-SC Pension

Certifies the Veteran served on active duty, was separated under honorable conditions from the Armed Forces, and is in receipt of NSC disability pension.

Parent of Veteran with 100% Rating

Certifies the dates the Veteran was on active duty, separated under honorable conditions, and that the Veteran has existing service-connected disability(ies) rated at 100 percent. The recipient of this letter is the mother of the Veteran.

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Parent of Veteran with SC Related Death

Certifies the dates the Veteran was on active duty, separated under honorable conditions, and that the Veteran died of a service-connected disability. The recipient of this letter is the mother of the deceased Veteran.

Spouse of Veteran with 100% Rating

Certifies the dates the Veteran was on active duty, separated under honorable conditions, and that the Veteran has existing SC disability(ies) rated at 100 percent. The recipient of this letter is the spouse of the Veteran.

Surviving Spouse of Veteran with SC Related Death

Certifies the dates the Veteran was on active duty, separated under honorable conditions, and that the Veteran died of a service-connected disability. The recipient of this letter is the surviving spouse of the deceased Veteran

Commissary & Exchange Privilege Letters

Commissary letters allow eligible Veterans and dependents unlimited exchange and commissary store privileges at military installations.

See KM Article: [Commissary and Exchange Eligibility](#)

PCRs must verify eligibility and provide the letter alongside a [DD Form 1172-2](#), *Application for Identification Card/DEERS Enrollment*.

Future Exam Date

When generating a commissary letter, the PCR will be prompted to indicate if the Veteran has a future exam. A future exam is an indication that the Veteran's service-connected condition might improve. These ID cards will expire at the end of the month in which their future exam date is scheduled.

If the Veteran is still eligible for a commissary card after the exam is completed and a rating decision is made, the Veteran must reapply and obtain a new commissary card.

Patronage Expansion

The Defense Department has announced expanded Commissary, Military Service Exchange and MWR access effective January 1, 2020 and established a standard for physical access to military installations. The Commissary Letter is not necessary for this benefit but can be provided if requested. PCRs must ensure the disability rating is correct and inform the Veteran that the letter does not meet the same requirements to obtain a DOD ID Card.

New Vantage Point blog article was posted on 12/31/2019 with [DoD answers top 10 questions on expanded commissary, exchange, MWR access.](#)

Other Ratings

Permanent & Total (P&T)

Many benefits require that the Veteran be permanently and totally disabled due to service-connected conditions. Receiving a 100-percent rate from VA does not mean the Veteran has been found permanently and totally disabled. An RVSR must rate a Veteran P&T.

This is shown in the system as “Basic Eligibility under 38 USC Ch 35”.

Individual Unemployability (IU)

Being unemployable and being unemployed are not the same for determining entitlement to an IU rating. A Veteran may be unemployed and even have a history of unemployment from several jobs, but not be incapable of substantially gainful employment (unemployable). Unemployment can be due to economic factors, work performance issues, or other reasons and not necessarily related to being unable to secure or follow substantially gainful employment due to an SC disability(ies).

This is shown in the system as “Individual Unemployability Granted”.

Effective Dates

Occasionally, clients will state the letter needs to have the effective date. The effective date for benefits determines when the entitlement to benefits the beneficiary is established. PCRs must review the system of record to determine the effective dates when requested or when the authorizing agency directs.

Completing a Request for a Letter

Once you have completed the search for the Veteran’s record and properly identified the client, you will need to determine the appropriate letter to address the client’s needs and in some cases, verify eligibility for the requested letter.

After you have completed these activities and are ready to create the requested letter, follow the steps outlined in the Creating Letters in CRM/UD-O Job Aid to create the requested letter.

Self Service Options for Letters

When not at your station, eligible beneficiaries needing letters can call the NCC, where a representative can mail (or fax) client requested letters. Furthermore, VA Forms also can be emailed.

VA.gov

Currently, Veterans can access the following letters on VA.gov with an existing account with:

- DS Logon,

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- MyHealthVet, or
- ID.me

Letters available include:

- **Proof of Service ID Card:**
This card shows the Veteran served honorably in the Armed Forces. This card might be useful as proof of status to receive discounts at certain stores or restaurants.
- **Proof of Credible Prescription Drug Coverage Letter:**
This letter is proof the Veteran qualifies for Medicare Part D prescription drug coverage.
- **Proof of Minimum Essential Coverage Letter:**
This letter indicates that the Veteran has Minimum Essential Coverage (MEC) as provided by VA. MEC means that your health care plan meets the health insurance requirements under the Affordable Care Act (ACA).

Note: The above letters are not available within VBA systems.

- Service Verification Letter
- Civil Service Preference Letter
- Benefit Summary and Service Verification Letter
- Benefit Verification Letter

eBenefits

Only available to Premium account holders. Veterans will still have access to the following letters in eBenefits:

- Post 9/11 GI Bill Statement of Benefits
- Certificate of Eligibility for Home Loan Benefits
- Requests for DD Form 214.

Summary

When a client requests a letter, PCRs must identify the appropriate letter to meet the client's needs, appropriately review the system to determine eligibility (if applicable), and properly create the requested letter. Clients depend on PCRs to provide letters for various reasons, such as meeting eligibility requirements for benefits and services provided by state and local governments, validating income for loans, lease applications, etc. PCRs must ensure that each requested letter is generated in an efficient and effective manner with the necessary information to meet the client's needs.

SUMMARY OF CHANGES	
PUBLISH DATE	UPDATES
February 2022	Current Update
Previous Status date	Previous Update