

BEING PREPARED DOES NOT REPLACE PROFESSIONAL HELP. IT HELPS YOU USE PROFESSIONAL HELP WELL.

Representative / Organization:		Appointment Date:	
Condition / Issue:		Meeting Method / Location:	

Priority	Question I Want to Ask	Why I'm Asking	Source / Document	Page / Location	Answer / Notes

3. Materials Related to My Questions

Bring or have available the records that relate to the questions you actually want help with. This is not a universal evidence checklist.

Document / Record	Why I May Need It	Saved Location / Available?
		☐
		☐
		☐
		☐
		☐
		☐

4. What I Know vs. What I Need Help With

What I Already Know / Can Locate	What I Need Help Understanding

5. During the Meeting

These are your meeting notes, not a substitute for formal correspondence or professional advice provided by the representative.

Question	What I Heard / Understood	Source / Resource Referenced	Recommended Action	Who Acts Next?	Follow-Up / Deadline
				☐ Me ☐ Rep. ☐ VA ☐ Other	
				☐ Me ☐ Rep. ☐ VA ☐ Other	
				☐ Me ☐ Rep. ☐ VA ☐ Other	

6. Before I Leave

- ☐ I understand what I am responsible for doing next.
- ☐ I know what the representative is doing next, if anything.
- ☐ I recorded any dates or follow-up points discussed.
- ☐ I know what documents or information I need to obtain.
- ☐ I asked for clarification where I did not understand something.

7. After the Meeting - Close the Loop

- ☐ New task -> add or update Tool 16, VA Correspondence & Activity Log.
- ☐ Need a record -> return to the applicable records tools and Tool 11.
- ☐ New condition-specific information -> update Tools 7-11 as appropriate.
- ☐ New or revised personal statement -> return to Tools 12-13.
- ☐ New submission -> create a new Tool 15 Submission Inventory.
- ☐ Decision question clarified -> update Tool 18 notes without changing what the original decision actually said.

Verify Accreditation

If someone is helping with a VA benefits claim in a representative capacity, verify their accreditation using VA's current official accreditation resources. The book will identify where to find the current official resource rather than reproducing a directory that can become outdated.

Keep the Standard

Good self-advocacy doesn't mean having every answer. Sometimes it means being organized enough to ask the right person a better question.

Preserve your meeting notes as a record of what you understood at that time. If something changes later, add the next event rather than rewriting the earlier record.