

Appendix B: Your Personal Checklist

By completing the checklist below, you can begin taking advantage of VA benefits, services and tools that can help you build the kind of life you want. During the course, you will have several opportunities to update this checklist.

- Review each section as instructed by your facilitator.
- Customize your checklist by:
 - Crossing out the things that don't apply to you.
 - Using the blank spaces to add more items to your list.
- Check the boxes when you complete each item.

Be sure to note the **deadlines and important time frames** to complete each action on time.

1	General Items	Timeline/Deadline
Navigating Your Journey	<input type="checkbox"/> Check my separation documents for accuracy.	As soon as I receive them
	<input type="checkbox"/> Store printed separation documents in a safe place and tell my next of kin or others who need to know where they are located.	As soon as I receive them
	<input type="checkbox"/> Establish personal goals and priorities.	Now
	<input type="checkbox"/> Set up a One-On-One Assistance session with my Benefits Advisor.	Before I leave this course
	<input type="checkbox"/> Create a DS Logon and/or register for a VA.gov account.	As soon as possible, if I haven't already
	<input type="checkbox"/> Register/create an account on VA.gov.	As soon as possible, if I haven't already
	<input type="checkbox"/> Complete the Transition Assistance Curriculum Participant Assessment for the VA Benefits and Services course.	As soon as possible, if I haven't already
2	Disability Compensation and Related Benefits	Timeline/Deadline
Supporting Yourself and Your Family	<input type="checkbox"/> Gather copies of my service treatment records to support my pre-discharge disability compensation claim (if applicable).	Before submitting my disability claim
	<input type="checkbox"/> Appoint a Veterans Service Officer from an accredited Veterans Service Organization (VSO) to prepare and submit my claim on my behalf (if applicable).	Before separation
	<input type="checkbox"/> Submit a pre-discharge disability claim under the Benefits Delivery at Discharge program (if applicable).	180 to 90 days before my separation (the closer to 180 days, the better)
	<input type="checkbox"/> Complete my Separation Health Assessment required for disability claims (if applicable).	Less than 180 days before my separation
	<input type="checkbox"/> Apply for related benefits, such as clothing or automobile allowances, if eligible.	As needed

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2	Disability Compensation and Related Benefits (continued)	Timeline/Deadline
	<input type="checkbox"/> Check if I am eligible for Combat Related Special Compensation and Concurrent Retirement and Disability Pay.	Upon receipt of VA disability rating, if also receiving retired pay
	<input type="checkbox"/> Apply for VA Pension (if applicable).	As soon as I am age 65 or older, or have limited or no income
	<input type="checkbox"/>	
	<input type="checkbox"/>	
3	Life Insurance	Timeline/Deadline
	<input type="checkbox"/> Determine my insurance coverage needs and eligibility for myself and/or spouse and dependents.	As soon as possible
	<input type="checkbox"/> Apply to convert my Servicemembers' Group Life Insurance (SGLI) coverage to Veterans' Group Life Insurance.	1 year and 120 days from separation (no health review if I apply in first 240 days)—refer to Figure 13 in this guide for time extension until June 11, 2021
	<input type="checkbox"/> Apply to extend my SGLI coverage with the SGLI Disability Extension.	Within 2 years of my separation date
	<input type="checkbox"/> Apply for SGLI Traumatic Injury Protection (if applicable).	As soon as possible, if I did not apply while in service (if eligible)
	<input type="checkbox"/> Apply for Service-Disabled Veterans Life Insurance (if applicable).	Basic: Within 2 years of VA notifying me of a new service-connected disability Supplemental: Within 1 year of VA approval of premium waiver or before age 65, whichever occurs first
	<input type="checkbox"/> Apply to convert Family Servicemembers' Group Life Insurance to a policy with a participating commercial insurer (if applicable).	No later than 120 days after my separation
	<input type="checkbox"/> Tell my family about all my insurance and how to file a claim.	As soon as possible
	<input type="checkbox"/>	
4	Burial and Memorial Benefits	Timeline/Deadline
	<input type="checkbox"/> Discuss my needs and wishes with my loved ones.	As soon as possible
	<input type="checkbox"/> Register for the VA burial Pre-Need Program.	As soon as possible
	<input type="checkbox"/> Tell my family how to apply for burial benefits upon my death.	As soon as possible

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4	Burial and Memorial Benefits (continued)	Timeline/Deadline
	<input type="checkbox"/> Tell my family how to apply for a Presidential Memorial Certificate upon my death.	As soon as possible
	<input type="checkbox"/>	
	<input type="checkbox"/>	
5	Monetary Benefits for Survivors and Other Benefits	Timeline/Deadline
	<input type="checkbox"/> Tell my family about monetary benefits they may be eligible for upon my death: Dependency and Indemnity Compensation and the Survivors Pension.	As soon as possible
	<input type="checkbox"/> Open an account with a Veterans Benefits Banking Program-participating bank or credit union to safely, reliably and inexpensively receive and manage my VA monetary benefits.	As soon as possible, if I haven't already
	<input type="checkbox"/>	
	<input type="checkbox"/>	
6	Education Benefits	Timeline/Deadline
Getting Career Ready	<input type="checkbox"/> Apply for one of the following GI Bill benefits: <ul style="list-style-type: none"> <input type="checkbox"/> Post-9/11 GI Bill <input type="checkbox"/> Montgomery GI Bill Active Duty <input type="checkbox"/> Montgomery GI Bill Selected Reserve <input type="checkbox"/> Dependents' Educational Assistance 	As soon as I determine if I will use the benefit
	<input type="checkbox"/> Use the GI Bill Comparison Tool to compare schools and do other useful research.	After/if I determine going to school is the next step
	<input type="checkbox"/> Find out more about Veterans Success on Campus or Veterans Integration to Academic Leadership programs at participating schools I might be interested in attending.	As soon as I identify schools that might be right for me
	<input type="checkbox"/> Transfer benefits to dependents before departing the military.	As soon as I determine if I will use the benefit
	<input type="checkbox"/> Apply for Survivors' and Dependents' Educational Assistance (DEA) for my spouse or dependents, if applicable (only if I am permanently and totally disabled as a result of a service-related condition).	As soon as possible
	<input type="checkbox"/> Tell my family about education benefits they may be eligible for upon my death: DEA and the Fry Scholarship.	As soon as possible
	<input type="checkbox"/>	

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7	Career Counseling Opportunities	Timeline/Deadline
	<input type="checkbox"/> Apply for Personalized Career Planning and Guidance (PCPG) benefit.	When I am ready to start exploring education and career options or when I need it
	<input type="checkbox"/> Apply for Veteran Readiness and Employment (VR&E) (if applicable).	When I am ready for job training and employment, if eligible
	<input type="checkbox"/> Attend orientation session for PCPG or VR&E if approved.	As scheduled by VA
	<input type="checkbox"/>	
8	Employment Resources	Timeline/Deadline
	<input type="checkbox"/> Connect with a Veteran Employment Services Office representative.	When I need more information or am ready to apply for a federal/VA job
	<input type="checkbox"/> Obtain a Veterans’ Preference letter from VA.gov.	As soon as I determine I want to apply for federal government jobs
	<input type="checkbox"/> Explore VA resources and tools to find careers at VA or other federal agencies at www.va.gov/jobs .	When I am ready to explore the workforce
	<input type="checkbox"/> Explore potential careers using resources at www.dol.gov/agencies/vets .	When I am ready to explore the workforce
	<input type="checkbox"/>	
	<input type="checkbox"/>	
9	Housing Benefits	Timeline/Deadline
Finding a Place to Live	<input type="checkbox"/> Ensure I have satisfactory credit and sufficient income.	Depending on my needs
	<input type="checkbox"/> Get my Certificate of Eligibility (COE) for a VA Home Loan Guaranty at VA.gov or from my lender.	Depending on my needs
	<input type="checkbox"/> Complete the loan application with my lender and ensure they have my COE.	Depending on my needs
	<input type="checkbox"/> Apply for the Specially Adapted Housing (SAH) grant (if applicable).	As soon as I determine that I’d like to apply for one, if eligible
	<input type="checkbox"/> Apply for the Special Housing Adaptation (SHA) grant (if applicable).	As soon as I determine that I’d like to apply for one, if eligible
	<input type="checkbox"/> Apply for Veterans’ Mortgage Life Insurance if I get a SAH grant or SHA grant (if applicable).	As soon as I have a title and a mortgage on the home, and before age 70, if eligible

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10	Homeless Veterans Support	Timeline/Deadline
	<input type="checkbox"/> Schedule a One-On-One Assistance session with my Benefits Advisor if I'm concerned about possibly being homeless after separation.	As soon as possible
	<input type="checkbox"/> Call 1-877-4AID-VET (1-877-424-3838) or visit my local VA medical center or community resource and referral center for assistance.	As soon as possible
	<input type="checkbox"/> Explore www.va.gov/homeless to learn about VA programs for Veterans who are homeless and share that information with others.	As soon as possible
	<input type="checkbox"/>	
	<input type="checkbox"/>	
11	State and Local Benefits	Timeline/Deadline
	<input type="checkbox"/> Explore Military OneSource for resources in my community.	Up to 1 year after my separation
	<input type="checkbox"/> Explore the National Resource Directory (NRD) for resources in my community.	Anytime before or after my separation
	<input type="checkbox"/> Request a State Benefits Information Packet for any state I am interested in.	As soon as possible
	<input type="checkbox"/>	
	<input type="checkbox"/>	
12	Maintaining Your Health	Timeline/Deadline
Maintaining Your Health	<input type="checkbox"/> Complete my Personal Health Inventory.	Before my first post-separation health care appointment
	<input type="checkbox"/> Complete and submit my online application for VA health care, ensuring that my contact information is accurate.	As soon as possible (cannot register more than 1 year before separation)
	<input type="checkbox"/> Apply for VA dental insurance.	No time limit associated with this benefit
	<input type="checkbox"/> Enroll in the Foreign Medical Program (if applicable).	No time limit associated with this benefit
	<input type="checkbox"/> Take advantage of VA mental health services.	Within 1 year of separation (for free mental health care) Note: You can still file a disability claim related to mental health issues even after 1 year has passed

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12	Maintaining Your Health (continued)	Timeline/Deadline
	<input type="checkbox"/> Reach out in times of crisis by using the Veterans Crisis Line—call, chat online or text.	Any time—24 hours a day, 7 days a week, 365 days a year
	<input type="checkbox"/> Apply for disability compensation for posttraumatic stress disorder (if eligible) or military sexual trauma.	No time limit associated with these benefits
	<input type="checkbox"/> Register for a My HealtheVet account.	Basic account: As soon as possible Premium account: After my separation
	<input type="checkbox"/> Opt out of Veterans Health Information Exchange (if applicable) or opt back in (if applicable).	Depending on preferences
	<input type="checkbox"/>	
	<input type="checkbox"/>	
13	Community Connections	Timeline/Deadline
Connecting with Your Community	<input type="checkbox"/> Ensure I have a DS Logon and access to VA.gov.	As soon as possible
	<input type="checkbox"/> Update my contact information on VA.gov.	As soon as possible
	<input type="checkbox"/> Set up a One-On-One Assistance session with my Benefits Advisor.	As soon as possible
	<input type="checkbox"/> Locate a VSO on VA.gov.	Depending on needs
	<input type="checkbox"/> Connect with a VSO in person at a VA medical center, VA regional office or military installation.	Depending on needs
	<input type="checkbox"/> Connect with a Veteran Peer Group of my choice; there are many to choose from.	Depending on needs
	<input type="checkbox"/> Use online resources such as VA.gov, My HealtheVet, Military OneSource and the NRD to search for information on benefits and community connections.	Depending on needs
	<input type="checkbox"/>	
<input type="checkbox"/>		