

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	Check my separation documents for accuracy.	As soon as I receive them
	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
	Establish personal goals and priorities.	Now
	Set up a One-On-One Assistance session with my Benefits Advisor.	Before I leave this course
	Create a DS Logon and/or register for a VA.gov account.	As soon as possible, if I haven't already
	Register/create an account on VA.gov.	As soon as possible, if I haven't already
	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	Gather copies of my service treatment records to support my pre-discharge disability compensation claim (if applicable).	Before submitting my disability claim
	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
	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)
	Complete my Separation Health Assessment required for disability claims (if applicable).	Less than 180 days before my separation
	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
	Apply for VA Pension (if applicable).	As soon as I am age 65 or older, or have limited or no income
3	Life Insurance	Timeline/Deadline
	Determine my insurance coverage needs and eligibility for myself and/or spouse and dependents.	As soon as possible
	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 14 in this guide for time extension until June 11, 2021
	Apply to extend my SGLI coverage with the SGLI Disability Extension.	Within 2 years of my separation date
	Apply for SGLI Traumatic Injury Protection (if applicable).	As soon as possible, if I did not apply while in service (if eligible)
	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
	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
	Tell my family about all my insurance and how to file a claim.	As soon as possible
4	Burial and Memorial Benefits	Timeline/Deadline
	Discuss my needs and wishes with my loved ones.	As soon as possible
	Register for the VA burial Pre-Need Program.	As soon as possible
	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
	Tell my family how to apply for a Presidential Memorial Certificate upon my death.	As soon as possible
5	Monetary Benefits for Survivors and Other Benefits	Timeline/Deadline
	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
	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
6	Education Benefits	Timeline/Deadline
Getting Career Ready	Apply for one of the following GI Bill benefits: Post-9/11 GI Bill Montgomery GI Bill Active Duty Montgomery GI Bill Selected Reserve Dependents' Educational Assistance	As soon as I determine if I will use the benefit
	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
	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
	Transfer benefits to dependents before departing the military.	As soon as I determine if I will use the benefit
	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
	Tell my family about education benefits they may be eligible for upon my death: DEA and the Fry Scholarship.	As soon as possible

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7	Career Counseling Opportunities	Timeline/Deadline
	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
	Apply for Veteran Readiness and Employment (VR&E) (if applicable).	When I am ready for job training and employment, if eligible
	Attend orientation session for PCPG or VR&E if approved.	As scheduled by VA
8	Employment Resources	Timeline/Deadline
	Connect with a Veteran Employment Services Office representative.	When I need more information or am ready to apply for a federal/VA job
	Obtain a Veterans' Preference letter from VA.gov .	As soon as I determine I want to apply for federal government jobs
	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
	Explore potential careers using resources at www.dol.gov/agencies/vets .	When I am ready to explore the workforce
9	Housing Benefits	Timeline/Deadline
Finding a Place to Live	Ensure I have satisfactory credit and sufficient income.	Depending on my needs
	Get my Certificate of Eligibility (COE) for a VA Home Loan Guaranty at VA.gov or from my lender.	Depending on my needs
	Complete the loan application with my lender and ensure they have my COE.	Depending on my needs
	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
	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
	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
	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
	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
	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
	Apply for VA Pension (if applicable)	As soon as I am age 65 or older or have limited or no income
11	State and Local Benefits	Timeline/Deadline
	Explore Military OneSource for resources in my community.	Up to 1 year after my separation
	Explore the National Resource Directory (NRD) for resources in my community.	Anytime before or after my separation
	Request a State Benefits Information Packet for any state I am interested in.	As soon as possible
12	Maintaining Your Health	Timeline/Deadline
Maintaining Your Health	Complete my Personal Health Inventory.	Before my first post-separation health care appointment
	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)
	Apply for VA dental insurance.	No time limit associated with this benefit
	Enroll in the Foreign Medical Program (if applicable).	No time limit associated with this benefit
	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
	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
	Apply for disability compensation for posttraumatic stress disorder (if eligible) or military sexual trauma.	No time limit associated with these benefits
	Register for a My HealthVet account.	Basic account: As soon as possible Premium account: After my separation
	Opt out of Veterans Health Information Exchange (if applicable) or opt back in (if applicable).	Depending on preferences
13	Community Connections	Timeline/Deadline
Connecting with Your Community	Ensure I have a DS Logon and access to VA.gov.	As soon as possible
	Update my contact information on VA.gov.	As soon as possible
	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
	Connect with a VSO in person at a VA medical center, VA regional office or military installation.	Depending on needs
	Connect with a Veteran Peer Group of my choice; there are many to choose from.	Depending on needs
	Use online resources such as VA.gov, My HealthVet, Military OneSource and the NRD to search for information on benefits and community connections.	Depending on needs