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TO: Department and Chapter Commanders and Adjutants
National Service Officers

FROM: Jim Marszalek, National Service Director

DATE: June 23, 2025

SUBJECT: Department and Chapter Service Officer Certification Program

Throughout our history, DAV's primary mission has been to provide the highest quality, most professional claims representation to ill and injured veterans as well as their families, survivors and caregivers. A critical component of this mission is maintaining a knowledgeable and well-trained nationwide network of department and chapter service officers (DSOs and CSOs) who help extend our outreach to those in need.

This unwavering commitment to excellence has kept DAV at the forefront of veterans' advocacy for over a century. Our dedication has never wavered, and we pledge that it never will. DAV's professional staff remains steadfast in its promise to deliver the very best service to veterans now and in the future.

We are pleased to announce that our **Department and Chapter Service Officer Certification Training** is now available online through our **interactive Training Resource Advocacy and Knowledge (iTRAK)** platform. This system offers essential training and the latest updates on veterans' benefits, tailored for DSOs and CSOs.

All certified service officers now have certain access to the DAV **Case Management System (CMS)**. This system must be used to submit all claims and supporting documents. Submissions by email, personal delivery, or mail are no longer accepted.

CMS offers many benefits, including:

- Quick access to existing client contact information
- Real-time claim submission to national service offices
- Organized record-keeping of calls, interviews, notes, and claims

Certified service officers can request access by contacting their local national service office. This memorandum provides policy guidance regarding certification eligibility and the indemnification program. Please review the following details carefully to ensure full compliance and optimal use of these valuable resources.

Certification Eligibility

Who is eligible for certification?

Any DAV member in good standing is eligible for certification when nominated by the appropriate chapter or department commander and/or adjutant. Service officers cannot be accredited as an attorney, claims agent or with any other organization. Effective immediately, it is required that all individuals acting as service officers at the local level receive this certification each and every year.

The **Service Officer Nomination Form** must be used by departments and chapters to nominate members to attend. There is no minimum or maximum number of members a chapter can nominate to be certified. Nomination forms must be legible and include each nominee's personal email address, which must be unique to the individual. iTRAK does not allow for one email address for multiple nominees.

DAV Auxiliary members are prohibited from being nominated or acting as a DAV service officer since they are not DAV members.

Service Officers must have the following electronic equipment available:

- ✓ Laptop or computer
- ✓ Secure internet connection, such as via Wi-Fi, MiFi or cell phone hotspot
- ✓ Scanner or equivalent

What are the “levels” of training?

Certification includes attending either Level I or Level II training. Service officers attending certification training for the first time must participate in-person, and all others recertifying may do so in-person or online via iTRAK. *If a service officer's certification expires, they must be nominated and retake the training in-person. Under no circumstance are they permitted to participate in claims-related activities during a period where their certification is expired.*

✓ Level I training:

Level I training covers topics such as DAV's history and programs, service officer responsibilities; VA benefits, such as claims and appeals preparation and processes; and interview techniques, including suicide prevention and military sexual trauma.

All chapter service officers must complete Level I at least once before being eligible for Level II.

✓ Level II training:

Level II training is a more in-depth training focused on all topics in Level I. In addition, it covers effective dates, protected ratings, severance pay upon discharge,

combined ratings table, bilateral factor, general policy in rating, an introduction to the VA Schedule for Rating Disabilities, body systems and more of the disabilities that are most commonly filed for and how they are evaluated.

Training is by ***invitation only***. Department leadership and national service office management teams will determine which service officers are invited to the Level II training. Individuals who are eligible for consideration must have operated at the chapter level for at least two years and shown an aptitude for Level II training. All service officers operating at the department level will be invited to Level II training.

When does certification start and when does it expire?

DAV will grant certification to a qualified individual upon receipt and completion of the following: (1) a valid nomination, (2) all required training in its entirety, (3) a passing score (70 or higher) on the in-person examination, and (4) the executed training acknowledgement. Please note, if a service officer fails the exam they will not be certified until they attend the next in-person scheduled training session and successfully pass the examination. After 12 months, the certification will expire if the same items aren't repeated and completed. ***No extensions of certifications shall be authorized.***

Therefore, a service officer must complete Level I or II training at least once every 12 months to keep their certification. Upon a certification expiring, their iTRAK, and CMS user access, will be deactivated. They will no longer be covered under the indemnification program nor authorized to assist veterans or their dependents in DAV service officer-related activities.

How will training certificates be provided?

At the conclusion of training, the applicable national service office will issue a certificate of completion to each DSO and CSO who has satisfied all requirements. The certificate will include both the effective date and expiration date. Additionally, DSOs and CSOs will have access to their certificates within the iTRAK platform.

The national service office is responsible for adding, managing and maintaining a complete list of DSOs and CSOs in our iTRAK platform. They are also responsible for keeping an electronic record of all instructor/course critiques and nomination forms.

How will iTRAK and CMS access be provided?

As nomination forms for upcoming training are received, the applicable national service office will create or update user accounts based on the information provided. Nominated service officers will receive a welcome email with login instructions for iTRAK. Please note, if a service officer does not pass the examination and therefore does not become certified, their iTRAK user account will be deactivated.

Access to CMS will be granted upon successful completion of the certification training, which includes passing the iTRAK examination with a score of 70 or higher and electronically accepting the training acknowledgment.

What are the terms and conditions of certifications?

All DSOs and CSOs must abide by the following DAV terms and conditions of certification:

- ✓ Distribute DAV's Statement of Policy for Representation to all clientele electing DAV representation
- ✓ Not retain any documentation or claims-related correspondence within their offices or work spaces, including, but not limited to, electronic files
- ✓ Process all client-related information (e.g., correspondence, forms) through the DAV Case Management System
- ✓ Not use personal email addresses for any claims-related activities
- ✓ Not prepare appellate briefs or informal hearing presentations on behalf of DAV clientele
- ✓ Not represent DAV clientele before administrative hearing personnel and/or panels (e.g., VA rating officials, VA regional offices, Board of Veterans' Appeals, Committee on Waivers and Compromises)

The Indemnification Program

DAV recognizes the vital importance of chapter and department service programs in assisting in the fulfillment of DAV's overall mission to serve veterans. Because of this, the national organization has created and maintained an indemnification program ("program"). Under this program, the national organization may indemnify local service officers, their departments and chapters, up to \$500,000 in the event of threatened or active litigation. This protection is available only in cases in which the error was made by a certified service officer. *Please note, the program isn't applicable where DAV on its own initiative investigates and identifies an error created by a service officer and reimburses a claimant for loss of benefits. The Indemnification program is only applicable where the national organization receives notice of a threatened or legal claim from a claimant's legal counsel.*

Structure of the program:

- There is ***no cost*** to departments, chapters or service officers for this protection
- Each claim is covered up to ***\$500,000 combined limit*** for legal fees and verdict/settlement, with no deductibles
- In order to receive coverage, department and chapter service officers must:
 - (1) Complete certification training at least once every 12 months; and
 - (2) Process all claims and evidence through the DAV Case Management System
- All lawsuits or threats of lawsuits must be referred ***immediately*** to the national adjutant upon receipt. These **must be emailed** to servicepublic@dav.org.

What is not covered by this program:

As referenced above, DAV may investigate an alleged error by a local service officer and make a determination on whether benefits were lost. If a claimant receives compensation from the national organization due to the error of a local service officer, the national organization will seek reimbursement from the applicable chapter or department.

The DAV Board of Directors Policy 2 covers indemnification. The policy coverage is available **only** to *certified service officers and their affiliated departments and chapters*.

A handwritten signature in black ink that reads "Jim Marszalek". The signature is written in a cursive, flowing style.

Jim Marszalek
National Service Director

JTM:jbh