

VSO / Accredited Help Handoff Checklist

Prepare a clean meeting packet before discussing representation or claim support.

Verify the role

- ☐ Use official VA accreditation resources to verify status before sharing sensitive claim information.
- ☐ Ask whether the helper is a VSO, accredited agent, attorney, or another role.
- ☐ Ask what they can and cannot do for you.
- ☐ Ask about fees, scope, timelines, and communication expectations before signing anything.

Bring organized facts

- ☐ Current conditions, ratings, claim status, and deadlines.
- ☐ Decision letters, service records, medical records, forms, and evidence summaries.
- ☐ A short timeline of major events, treatment, claims, and decisions.
- ☐ Your top questions and what outcome you are trying to understand.

Protect yourself

- ☐ Keep copies of agreements, submissions, and confirmation numbers.
- ☐ Do not sign blank forms or share passwords.
- ☐ Ask how your records will be stored and who can access them.
- ☐ Use software output as prep context, not as representation advice.

Educational prep checklist only. ValorAI is not VA, a VSO, an attorney, an accredited claims agent, or a medical provider. This is not legal or medical advice and does not guarantee benefits. Use official VA channels or accredited help when you need filing or representation support.