

Branch Service Officer Fact Sheet

Roles, Privacy Obligations, and VAC Disability Claims

Purpose

The Royal Canadian Legion has been delivering programs and services to Veterans and their families since 1926. As we mark 100 years of service, we continue to advocate for all Veterans and their families to ensure they receive the benefits and services they deserve.

This Fact Sheet clarifies **what BSOs are authorized to do and not do** when assisting Veterans with Veterans Affairs Canada (VAC) disability benefits, in accordance with the **Privacy Act** and the **Royal Canadian Legion's MOU with VAC**.

Key Principle

Branch Service Officers are volunteer referral agents only. They are **not security cleared** and **must not handle medical or personal health information.**

What Branch Service Officers DO

- ✓ Act as the **first point of contact** for Veterans and families
 - ✓ Identify **unmet needs** and possible VAC benefits
 - ✓ Explain that **Legion assistance is free**
 - ✓ Assist in completing the **RCL Legion Application Form (consent form only)**
 - ✓ Obtain **proof of identification (POI)**
 - ✓ Forward completed consent and POI to **Provincial or Dominion Command**
 - ✓ Follow up to confirm the referral was sent
 - ✓ Arrange visits or information sessions with **Command Service Officers (CSOs)**
 - ✓ Maintain Veteran library of information materials and flyers (where space permits).
- ✓ Attend Legion Branch Service Officer training and seminars

What Branch Service Officers DO NOT do

- ✗ Handle, store, or retain Veteran files or medical information
- ✗ Ask personal or detailed health questions
- ✗ Write Veteran statements or sign on behalf of Veterans
- ✗ Submit applications to VAC
- ✗ Use or distribute blank VAC applications (including VAC 520)
- ✗ Contact VAC on a Veteran's behalf
- ✗ Counsel on likelihood of claim approval or denial
- ✗ Refer Veterans to medical professionals on behalf of the Legion
- ✗ Refer Veterans to paid third-party claims services
- ✗ Allow Branch facilities to be used by fee-charging claims companies
- ✗ Exceed volunteer authority based on former rank or experience

Who Handles VAC Disability Claims? Provincial and Dominion Command Service Officers

- ✓ Government security-cleared
- ✓ Professionally trained
- ✓ Legislated authority under:
 - *Pension Act*
 - *Veterans Well-being Act*
 - *Veterans Review and Appeal Board Act*
 - With consent, authorized access to VAC's **Client Service Delivery Network (CSDN)**
 - Provide **free representation** for claims and appeals

Why This Matters

Failure to follow these rules may result in:

- A **breach of the Privacy Act**
- Loss of credibility for all Service Officers and the Legion as a whole
- Risk to the Legion's **Memorandum of Understanding with VAC**
- Reduced access to VAC systems and slower service for Veterans

Remember

Helping Veterans is a **team effort**. Respecting privacy, staying within defined roles, and referring to Command Service Officers ensures Veterans receive **professional, timely, and secure support**.

Questions or concerns?

Branch Service Officers should contact their Provincial Command Service Officers.

Provincial Executive Directors and Command Service Officers should contact the Director of Veterans Services for clarification.

Veterans Services
The Royal Canadian Legion National Headquarters

Serving Veterans and their families since 1926

Lest We Forget