



12 May 2026

File:29-1

All Provincial and Branch Presidents
Provincial Executive Directors
Command Service Officers and Branch Service Officers

Subject: Branch Service Officer Roles, Privacy Obligations, and VAC Disability Claims

Comrades,

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.

In recent months, Dominion Executive Council (DEC), the Provincial Executive Directors, the Veterans Services and Seniors Committee, Dominion Command and Provincial Commands have discussed the opportunities and challenges facing the Veterans Services Network. While Veterans Services and is one of the cornerstone pillars and the strength of the Legion, there are challenges today:

1. The ongoing budget concerns and how they affect veterans and their families;
2. Veterans who are Homelessness or at risk of homelessness;
3. Privacy concerns about health and other personal information;
4. A continuing complex grid of policy, programs and eligibility criteria for Veterans;
5. An increasing number of veterans and family members (all generations) coming forward with challenging cases; and
6. Some companies are charging veterans to help them with disability applications. Although not illegal, it is immoral and predatory and some companies are profiting from veterans by charging a percentage of disability awards. Legion assistance is free.

We are the largest and most established organization and have the best ability to offer support to our Veterans and their families, however we must remain diligent and engage in the way that is best for the Veteran.

To understand the role of the Branch Service Officer in relation to supporting veterans for disability applications and appeals under the Veterans Well-being Act and the Pension Act, please also refer to the Legion website <https://www.legion.ca/support-for-veterans/assistance-with-vac> under the title Legion Branch volunteer Service Officers and the Service Officer Handbook (update in progress).

Our compassionate Branch Service Officer work is vital to the Legion. They are the eyes and ears of the Veterans Services Network who often first come into contact with Veterans and their families. As our boots on the ground volunteers, they assist Veterans by identifying those with unmet health needs and possible benefits from VAC.

As outlined in our Memorandum of Understanding (MOU) with VAC and in previous Dominion Executive Council directives, Branch Service Officers are to serve **as volunteer referral agents** to Provincial Command Service Officers. As Branch Service Officers are not security cleared, they must not handle, retain, or store sensitive medical or personal information. Doing so constitutes a breach of the *Privacy Act* of the Government of Canada.

Provincial and Dominion Command Service Officers are government security cleared and professionally trained to provide free of charge, assistance with the VAC disability claim process and if necessary, subsequent appeals. Their professional role is mandated through legislation to provide representation at all levels of the disability claim process under the *Pension Act*, the *Veterans Well-being Act*, and the *Veterans Review and Appeal Board Act*.

With the VAC MOU, Command Services Officers have closely monitored access to the VAC's Client Service Delivery Network (CSDN), can access Veteran's VAC files and have accountable representation to VAC and the VRAB. They also help clients access additional supports and services through the Legion and other national veteran organizations.

While it is helpful to understand and to advise and manage the expectations regarding possible Disability Benefits, it is the responsibility of the Provincial Command Service Officer to review a veteran's file or health records, to offer advice and assist with the submission of claims to VAC and appeals through every step of the way.

We must keep in mind that helping our veterans is a team effort and incorrect information or privacy breaches will have a negative impact on the credibility of all Service Officers and to the Legion as a whole.

BRANCH SERVICE OFFICERS Do's and Don'ts

From a Branch Service Officer perspective, **no actions should be taken outside of the following guidelines**, which are issued in accordance with the *Privacy Act* and the Legion's MOU with VAC.

What Branch Service Officers should:

- Act as a referral agent for Command Service Officers only for disability applications and other VAC benefits.
- Identify potential unmet needs of the veteran.
- Assist in filling out the RCL Legion Application form for consent in its entirety and obtaining proof of identification (POI).
- Send the RCL Legion Application form and POI to the appropriate Provincial or Dominion Command for action.

- Follow up with the Veteran, to inform them the RCL Legion Application has been sent to the specific Command (Provincial or Dominion).
- Schedule regular visits of the Command Service Officer at the Branch to meet with Veterans and their families and/or to host information sessions.
- Receive approval of the Poppy Trust Fund Committee before incurring any expenses out of Poppy Trust Funds.
- Maintain a library (if space is available) of information booklets and flyers regarding services and programs for veterans, seniors and their families.
- Attend regularly scheduled Service Officers Seminars.

A Branch Service Officer, in order to ensure compliance with the *Privacy Act* and the Legion MOU with VAC, must NOT:

- Write statements for a veteran or sign on behalf of a veteran.
- Ask veterans to sign a VAC 520 form for you to contact VAC on their behalf. This is the responsibility of the security cleared Command Service Officer.
- Former rank, security clearances, or experience does not grant authority in a volunteer role and should not be used to overstep established boundaries.
- Counsel on the potential of a favourable or unfavorable decision for a service-related condition.
- Use blank or printed VAC forms, as they may be outdated.
- Send applications to VAC.
- Keep files for veterans.
- Ask the veteran's personal health questions.
- Refer veterans to or liaise with medical professionals as it opens the Legion up for liability and VAC may not pay for their service.
- Allow Branch space or refer veterans to other organizations for assistance with VAC disability forms who financially take advantage by charging fees.

Please note that failure to follow the above procedures will result in a breach of the *Privacy Act*. This impacts the credibility of the organization and Command Service Officers across the country and the Royal Canadian Legion as a whole and impacts our MOU with VAC.

Compliance with protecting private information, and staying in our various roles, ensures our access to the VAC CSDN systems continues. This system allows for a faster service delivery model where CSOs can assess what is already approved, what is waiting for a decision and, to evaluate the next appropriate step. In the end, this ensures the privacy of the veteran's sensitive information is protected and their needs are being processed by VAC in an expeditious manner.

Our Veterans need us more than ever and in new ways. Let's be ready with the personalized and complex help they require.

Note: When Provincial Executive Directors (PEDs) have concerns, they should contact the Director of Veterans Service for a better understanding of the roles of Service Officers regarding VAC disability benefits.

In Comradeship,

A handwritten signature in black ink, appearing to read "Berkley Lawrence". The signature is written in a cursive style with a large initial "B" and "L".

Berkley Lawrence
Dominion President
The Royal Canadian Legion