Working Smarter to Serve those who’ve Served: Minnesota PTAC’s Veterans Verification Clinics

APTAC staff article

APTAC’s 2015 Outstanding Project Award was presented to Pat Dotter and Mark Cooper of the Minnesota PTAC for their development of a Veteran Verification Clinic to more effectively prepare veteran business owners for the verification process and guide them through it.

Because of the extensive amount of time spent training individual veteran businesses on the U.S. Department of Veterans Affairs (VA) Veteran Verification Program, Minnesota PTAC counselors Pat Dotter and Mark Cooper set out to maximize their efficiency. They developed a Pilot project “clinic” to assist veterans in understanding the whole process and properly preparing the required documents before uploading, with the goal of reducing the number of requests for further information during the review and examination phase and thus achieving a shorter time to get final CVE Verification status. The benefit to the counselors would be less repetitive individual training through providing a quality group training that included actual on-site preparation and upload.

The Pilot Clinic was comprised of three sessions, each one week apart. Veteran business owners could attend by counselor recommendation only; this was required to make sure participants would commit to the class and were willing to do the work. Each registrant was provided information regarding the clinic, the counselors’ expectations, study materials and pre-class work that was to be completed by arrival at the first clinic session. Every attendee business received a personal phone interview for assessment/readiness, Question & Answer with the instructors of the Clinic, and at least one other follow-up call prior to the first session.

Each session consisted of presentation and Q&A in the mornings, working lunches, and one-on-one time in the afternoon for individualized and specific needs/review of documents. Uploading of documents was handled during the afternoon of the second Clinic session. Veterans are sent an agenda in advance of each Clinic session along with guidelines for documents to bring for review.

For the Pilot Clinic, only six companies were invited, which proved to be just about the right number for only two counselors.
At the completion of the pilot, feedback was obtained from the attendees; adjustments were made and the clinic was revamped. The format was kept the same, but additional material was added as pre-class work and the third (last) session was dropped. The veterans in attendance also now receive a booklet explaining their Veteran Benefits and resources to assist in getting into the BIRLS system if needed, as well as a contact sheet including all VSO locations and information.

The Veteran Verification Clinic has now been held three times and is working very well. There is a significant list of items participants must complete before the first session; emails are sent six weeks in advance and approximately every ten days leading up to the actual first session. The importance of being prepared for the Clinic is strongly stressed and it has been found that almost all of the businesses are prepared and ready for serious work sessions upon arrival. Each attendee is encouraged to work with their local PTAC counselor to assure SAM is in order and to answer any questions or concerns that are expressed as the pre-clinic work is prepared, in anticipation of the first Clinic session.

In between the first and second sessions, phone calls and emails are sent checking progress, answering questions and offering any other assistance that might be needed.

The Clinics have been held in various locations around the state, always at a computer lab or facility that has plenty of room and internet access. The room is set up to allow for one business per large table (2 people maximum per business), with room to have laptop and materials and an additional chair for one-on-one with the counselor. Each attendee must bring their laptop, power cord, prepared materials and documents for review, as well as their completed pre-clinic assignments. After the first session, more homework is assigned with the clear understanding that all documents must be completed and ready for review and upload at the final Clinic session.

A third counselor has been added to the team, usually the counselor in whose area the Clinic is being hosted, and as a result they are able to accommodate ten to twelve businesses at one time. Feedback is gathered at the end of every Clinic and a debriefing is held with counselors to assess any needed changes.

The Veteran Verification Clinic has become so popular that there are wait lists for each session, and they have had no problem getting ten to twelve companies. According to Minnesota PTAC Program Manager, Sherri Komrosky, “The impact has been everything we had hoped it would be. We have happier veterans that are appreciative and knowledgeable regarding the verification process; more veterans are successfully getting approved in shorter amounts of time with minimal additional questions or documents being requested. It has helped the PTAC counselors streamline the training process, spend less time with one-on-one training, and allow for more document review time and veterans being able to upload their documents by the second session. We are hoping that CVE is/has noticed a difference in the quality of the applications coming from Minnesota.”
This project could easily be replicated at all PTACs, as long as there is someone willing to own it, handle logistics, communicate to the veterans and spend the time dedicated to reviewing documents. Training the veterans on the process, the reasoning, the necessity of completing the advanced class work, the format of the documents and packaging before uploading, can lead for a much smoother, less threatening review of the veteran business. The training allows the verification process to appear seamless, go quickly, and have less need for additional documentation, while reducing the stress and anxiety level of the veterans.

The materials created and the presentations, agendas and format can all be duplicated or adjusted to meet the need of any group. It is recommended, however, that participation be limited to no more than ten to twelve businesses per Clinic, which seems to be the maximum that can be effectively guided with three counselors. The Clinics should be held in spacious areas. The attendees like the idea of being able to lay things out and have plenty of room.

APTAC’s Outstanding Project Award is meant to recognize an accomplishment that stands out from the usual conference, event or other activity that PTACs undertake, which can benefit all PTAC members and/or serve as a model for other PTACs to emulate. The Minnesota PTAC’s Veteran Verification Clinics meets this criteria perfectly, as an effective new process for addressing a need faced by virtually every PTAC.