



# Veterans Clinic

School of Law

University of Missouri

# CLINIC MANUAL

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## Getting Started

**Before your first day of class** in the Veterans Clinic, you are required to:

1. Read through all sections of this Student Guide.
2. Read the Table of Contents to the Veterans Benefits Manual on Lexis Nexis. (If you have trouble finding or accessing, please see Cindy Shearrer in the Library.)
3. Follow the instructions in the Box section of this manual.
4. Follow the instructions in the Clio section of this manual.
5. Read the Class Syllabus found in Box at *Veterans Clinic –Admin > Tools and Training > Classroom > Fall 2019 Class Materials*.
6. There will be a quiz on the first day of class. Please prepare by making sure you accomplish the items above.

## Veterans Clinic Office Spaces – Quick Reference

Secure Spaces. The Veterans Clinic Spaces contain sensitive client files. **Therefore, the spaces must be occupied or secured at all times.** Keep your key with you at all times as space must always be locked if you are leaving and no one else is present..

Located in room 120 on first floor of Library: Admin Assistant – Dawn Klempke, and clinic students’ work spaces.

120c & 119c: Veterans Clinic Supervising Attorneys

120c: Angela Drake

119c: Brent Filbert

119a: Support Specialist – Sara O’Connor

119b: Authorizations assistant – Mary Frerking

120d: Clinic Conference Room

### Lock-box

Located on wall near filing cabinets beside Admin Assistant’s desk.

Contains keys to clinic supply lockers and client file drawers, and password login for student computers.

To open: press in key code of WORK (9675), then pull down on lever at top center

To close: press in key code of WORK (9675), then pull down on lever at top center to secure door with latch.

If you inadvertently press wrong keys, pull down on lever at bottom center of keypad to reset and try again.

### Client File Drawers (cabinets #2 & #3 located behind Admin Assistant’s desk).

Contain client paper files.

Access with key found in clinic’s combination lock-box.

Leave key in cabinet keyhole while drawers are unlocked

Re-lock drawers and return key to lockbox when departing clinic spaces if after hours or Admin Assistant is not present.

Top of cabinets contain client folders too large for green file in drawers. These are labeled on a tag on each drawer.

#### Other Clinic Files (cabinet #1 located behind Admin Assistant's desk)

Symposium Files, Amicus files, other events, projects and contacts.

Closed-client files, box of clients' disks.

Recently received paper documents not yet filed in clients' paper files

Other client records awaiting file uploads or closing storage

Access these other clinic files with key found in clinic's combination lock-box

#### Supplies

Printer paper can be found in the storage space beside the clinic filing cabinets or the in the clinic supply cabinet located outside of the clinic. If none is there, please ask Admin Assistant.

#### Student Computers

Can only be accessed using the VC pawprint and password (on card in lockbox).

Personal student pawprints will not work.

For documents *scanned to email > Vet Clinic*, take the following steps:

1. Access document in Outlook.
2. Rename document and save to desktop.
3. Upload the document to the appropriate folder in Box.
4. Delete document from the email inbox and desktop.

#### Printer/Copier/Scanner/Fax

- Located along wall besides Admin Assistant's desk.
- For incoming faxes, tell sender to use: **573-882-7996** (this fax number sends faxes to VCs email account, where it can remain secure until printed). To access if Admin Assistant is out, go to [webmail.missouri.edu](http://webmail.missouri.edu) and choose Faculty/staff email; [umc-users\mulawvetclinic@missouri.edu](mailto:umc-users\mulawvetclinic@missouri.edu); 4Tr00ps! (0s are zeros)
- To copy or scan, place documents on feeder tray face up, top in, or place directly on glass face down, top to left. On Menu screen, select Copy or Scan to Email>Vet Clinic. Use touch screen *applications* to select 2-sided, staple, color, number of copies, etc.
- To Print, use printer preferences on computer screen to change default settings.

#### **Box**

This is the official cloud storage site for the University. You already have an account as a student of MU. Shortly before the semester begins, you will be invited to three BOX folders. If you have never used your account before, click into one of the invitations and follow the instructions to set up your account. You will need to have some version of Microsoft Office installed on your laptop to be able to access box documents. **Once you**

**are logged into Box, please follow these simple instructions BEFORE arriving at the first class:**

1. Click into the folder “Tools and Training”, then “Classroom.”
2. Click into the Word document: “This is a test document.” A screen will prompt you to download Box Edit, do this and install it.
3. When you click on the “Test Document,” you will see it appear in a preview screen. To open it, click on the “Open” box at the top of the document. The page will open in what looks like a regular Word document. Type your full name on the page. Then click on the File menu and select “save.” You will see a box pop up on your screen saying that the document is being saved back to box. Click the X at the top right to close the document. Click the X at the top right of the preview screen to close the screen.
4. Now click “All Files” at the top of the screen. Click into the folder with your name. Click the box that says “New” at the top of the page. Click on Word Document, and name your document with Monday’s date of the first week of class. In the document, type “This is my first weekly memo” and save it just as you did above, then exit out of it. You will create a new weekly memo by noon every Monday just like this. This is how you will start documents inside Box, so they are not on your personal computer. You will be shown more Box navigation during the first class, but feel free to create your own folder outside of the VC ones and experiment. Box is a great place to store work and collaborate with other students/professors in other MU classes.
5. It is important that you create all new documents in box. While you can create word documents or excel sheets on your computer and upload them to box, sometimes errors can occur with uploading the document. When working on multiple documents/clients during the day, students will sometimes forget to upload all documents. Creating all documents in box first minimizes this.
6. Sometimes the box server will go down and you will not be able to upload files. When the server is down, keep the files on your computer in a folder entitled “uploads on box.” When the server is back online, drag the documents into the appropriate folders on box. You can check to see if the box server is down at <https://status.box.com/>.

If you are unable to access Box, please visit I.T. (suite 224 in the library) **before** the first class to work through any I.T. issues before class time.

VC staff will be watching for your names and Word docs to appear in box, as per the instructions above.

## **CLIO:**

This is the law firm software the Veterans Clinic uses to track your time. Shortly before the semester begins, you will receive an invitation to CLIO. Click into the invitation and create your Clio account.

Once inside the MU Veteran's Clinic Clio account, you will see a list of options in the black section on the left side of the screen.

**Matters:** Gives you a list of all the client and project file folders. The Display Numbers show when that file was chronologically created in Clio. The Client column will give you the name of the client or project name of the folder. Clicking on the arrow after these tabs will sort the folders to make them easier for you to find what you are looking for. Alternatively, you may use the search bar function in the upper left corner to search for you matter. *If you are working on a case for a new client and cannot find a "matter" in Clio, please create one.*

**Activities:** This is where you track your time, and the tab you will most often use in Clio.

### **Keeping Time:**

It is vital that you enter your hours as you work on matters. Waiting to enter your hours at the end of the week or later in the semester will make it difficult for you to accurately remember and record your hours. Thus, before you begin working on a Clinic Matter, always log in to Clio and start your timer in the upper right-hand corner

### **To enter time:**

Click on the blue "Add time" box at the top right.

Under "Matter," start typing the name of your client or project. **For your initial test prior to the semester, start typing "administration." Click on the "118-Administration" option when the drop-down menu appears.**

"Activity category" is not required, but you may select one, if you prefer.

"Duration:" type in the amount of time you would like to log. Multiple time formats are accepted. **For your initial test, enter 10 minutes.**

"Description:" Write a detailed description of your activities within the duration of time you logged. **For your initial test, type "learning to use Clio and Box."**

Once saved, you can always access your entry again at a later date to edit or add to notes, or change time.

You may also start the timer, next to the Duration box, when starting a project and fill in the rest of the boxes later.

**To check your total logged time for the week/month/semester:**

Still in the Activities screen, click on “Filter” on the right side. Ensure your name is chosen for “firm user.” Enter the Filter Dates, if you wish, or clear the date boxes to find all time you have ever logged in Clio. You may select a particular Matter if you wish, or leave blank to capture all Matters you have worked on. Click on the time clock symbol near the top left. You will find all your time listed in the Hours column with a total number of hours at the bottom. You may sort by Matter or Date by clicking on the headings. You also may edit any time entry from this screen.

**Guidelines for timekeeping:**

1. Bill in 1/10 of an hour. So, if you spend ½ hour on a task you would write “.5.” A short phone call would likely be 6 minutes or less, so that is “.1.”
2. Entries under 1 hour do not need to be broken down.
3. Keep the detail in the billing short and meaningful. For example, do not submit “tried client again and left message about need to return form on time” – instead “attempt call to client re: form” is better. Remember you can do memos to the file to impart information you need to memorialize.
4. **Do not block bill** – i.e. “researched law 8 hours” – you need to break down what you did in the 8 hours like: “reviewed 38 CFR 3.303 and related cases (2.3); applied cases to medical records (1.2) email to Drake to review memo(.1); drafted affidavit for client after interview with client (1.9) prepare 10 page brief combining law, records and affidavit (2.5)
5. Remember to bill all your time outside class, including meeting with the attorney; do so by client where possible.
6. Time not spent on client matters – i.e. symposium, amicus briefs, rulemaking comments, fundraisers, CLE, weekly memos, Tigers for Troops events and activities, should be billed to the specific project folder or “administrative”
7. Do not shortchange yourself! I will cut time, if necessary, before I submit to the court. I do not judge you adversely if tasks take a long time because I know you are a law student. Be honest, however, as proper time keeping is part of our ethical obligation as an attorney.

Sample time entry

9/21/17      Clinic                      2.6

Rework TBI powerpoint (1.2) review ABC’s of MST for presentation in class (.3) Pull and copy regulations for PTSD for class to review, and highlight the same (1.1)

9/21/17      Veteran G.                      1.2

Prepare form for doctor and relevant extract of VBM re: expedited treatment (.3) travel to and meeting with veteran and wife at Truman VAMC re: doctor statement (.9)

There is a 10-minute video on YouTube that gives an overview of Clio. The video covers topics that the clinic does not use; however, it does provide useful information on (1) searching through Clio, (2) creating a new matter, and (3) logging billable hours. Link is: <https://www.youtube.com/watch?v=GtiS2TcVi3E&t=10s>

## **Clients and Basic Correspondence**

Each of the clients you have been assigned to has a paper file and a Box file. Please familiarize yourself generally with all of your clients' file materials. For the most part, the paper file is identical to the electronic box file. To ensure confidentiality is maintained, you are not to take hard copies of files outside of the clinic spaces. Review any pass-down notes or transition memos from the student who had your client last semester, and any notes from Professor Drake or Professor Filbert.

***It is up to you to review the incoming mail logs on Box periodically to determine if any new mail has been received with regard to your clients. We do not automatically send alerts when mail is received in one of your files.***

### **Client Contact**

Begin by writing a letter to your client, introducing yourself.

- 1) On Box, go to Veterans Clinic-Admin > Tools and Training > Forms and Templates > Forms for client contact and files.
- 2) Find, *New Clinic Student initial client contact* Word Document.
- 3) Without opening, click box with 3 dots to the right of document title
- 4) Select *Move or Copy*
- 5) Click on plus-box to left of *MU Law VC Box-Clients*; do the same for *Clients*
- 6) Scroll down to find your client and click plus-box to left
- 7) Click on *Correspondence with Client* folder and then click *Copy* box at bottom.
- 8) Now go back to *All Files* and choose the *MU Law VC Box-Clients* folder
- 9) Click into your client's folder
- 10) Click into the "Correspondence with Client" folder
- 11) Find the Word document you just copied and *Open* it.
- 12) Write your letter using the format guidance.
- 13) Select File tab and click "Save;" this will save your letter back to box, not to your laptop!
- 14) Send email to your Professor with client name in subject line and tell her/him there is a letter to your client in Box, ready to be reviewed. Your professor will know where to go; do not send link in email. cc Admin Assistant on email.
- 15) After approval by the Professor, the correspondence **must** be logged on the Outgoing Mail Log. You or the Professor may log it. The letter will not be sent by the Admin Assistant until she is notified it has been approved by your Professor.

- 16) Once logged, the Admin Assistant will print on letterhead, mail to your client, and upload the pdf to the Correspondence with Client folder.

### Other Correspondence and Attachments to Correspondence

When you are writing a letter (or brief), begin your work as follows:

- if the letter is to the VA, begin the draft in the “Correspondence Outgoing to VA...” file.
- if the letter is to a doctor, begin the draft in the “Correspondence with Third Parties” file.
- if the letter is to a client, begin the draft in the “Correspondence with Client” file

NOTE, it is ok for drafts to be placed in these files. Once mailed, the pdf is uploaded into the file.

- if you are writing any other letter, use your judgement regarding who is receiving your correspondence, and draft it in the appropriate file.

You may find many example letters and/or form letters on Box. Feel free to ask the Professors to direct you to a similar letter or form.

*For attachments* – you **must** create a folder on Box with the attachments in the folder – highlighted as necessary and/or bates numbered as necessary. This is necessary so that the Admin. Assistant can easily see and pull the proper attachment(s) for the document on the Outgoing Mail Log. The attachments folder should be placed in the proper files as indicated above. For example, if you are doing a letter to the client with attachments, you would create a folder that says “00.00.19 (date) letter to client re: \_\_\_\_\_ with attachments.” You would then upload the word document and the attachments into this folder.

### How do we send Clinic Correspondence?

#### Emails

Emails to clients, medical personnel, witnesses, etc. must be proofed by Clinic Supervising Attorneys before sending; cc attorney and admin assistant on **ALL** email correspondence to ensure record of communication is uploaded to client’s file.

#### Texting/Phone Conversations/Messaging

All phone/text conversations must be memorialized in detail in a Box-Note or Word memo in the client’s “Correspondence with Client” folder on Box. Please remember to note your name and the date of the conversation in the memo. Please do not Facebook/Twitter/Instagram message your clients. Please limit texting. Communicate as a professional. This means writing well crafted emails or letters.

## Outgoing Correspondence

Your primary responsibility for outgoing correspondence is to draft it completely, pull attachments and have the package approved by Professor Drake or Professor Filbert. Note, if enclosures will be included with the correspondence, you must print, label and complete forms as necessary, and give them to the Admin Assistant, or explain in an email exactly where to find them in Box.

VA forms for client signatures must be obtained directly from [www.va.gov/vaforms](http://www.va.gov/vaforms) to ensure the most up-to-date version of the form is being used. (see list of frequently used forms in this manual)

Please consult the Admin. Assistant before printing documents of more than 25 pages in length.

The instructions below are typically handled by the Admin Assistant, but in case of absence, they are included here for your use.

\*\*\*\*\*Instructions\*\*\*\*\*

### \*\*Before sending\*\*

- 1) Ensure cover letter is printed on VC letterhead and has the current date on it (see Mail Center section below to locate supplies)
- 2) **Scan entire** packet of materials to Vet Clinic email; rename using client's last name, date, and brief document description [ex: smith\_5-10-17 NOD submission]
- 3) If document/packet is being sent to other than the client, make a full copy for the Client, adding a sticker "for your records" sticker on the front of the document.
- 4) **Upload into appropriate box file** folder (a new folder can be created to break up large packages into smaller scans of separate forms/documents).
- 5) After uploading, use rectangle with dots to right of file name to "**Copy**" to: **Diary** (Angela or Brent) for Correspondence follow-up > Outgoing Correspondence (If lengthy documents are submitted, copy only cover letter to Diary).
- 6) **Make a paper copy** of only the cover letter and place it in Admin's In-Box.
- 7) **Log document in Outgoing Mail Log** for appropriate month, and note any Certified mail numbers or "faxed," if appropriate.

## Veterans Clinic Outgoing Mail Center

On Admin Assistant's side work desk, near desktop HP printer. All paper, envelopes, folders, labels, and other miscellaneous mail items are filed in the Wall file to the right of the table.

**MU Veterans Clinic Letterhead Stationery:** 6<sup>th</sup> pocket in wall file

*Please use our official VC Letterhead Stationery for all outgoing correspondence and be sure you have the **current date** on document before printing onto letterhead.*

**Envelopes** (and SASE's): 5th pocket in wall file

Larger envelopes are in the 3<sup>rd</sup> and 4<sup>th</sup> pockets of the wall file.

**USPS** *sending via regular mail*

Place a **mailing barcode label** (found in the first pocket of wall file) near bottom left corner of front of envelope, and place envelope in outgoing mail basket found in 203 on the front counter to the right side. (Mail goes out from there around 9:30 each morning).

Certified Mail: If item needs to be tracked, place a Certified Mail label (in wood Mail box on table) near top of envelope as instructed on label. Tear off "receipt" portion and staple to cover letter copy in Admin's In-Box. This can be tracked at USPS.com, but if a signature card is also required, put the recipients address in section 1 on a green card, stick the extra peel-off Cert-Mail number strip from the green/white label in section 2, and check "Certified Mail" in section 3. Then stick this card to the back of the envelope with the Cert Mail label on it (our return address is already on the back of card). See example envelope in folder. **DON'T FORGET THE MU BAR CODE LABEL!**

**Fed Ex**

Bring all materials (FedEx envelopes and boxes can be found in the 203 supply room), recipient's address and phone number, to Robin Stoermer in 205 or Admin Assistant in 203 and ask them to use their accounts to create a label and send; Tell them it is for the Veterans Clinic and that Dawn is out of the office and they should have the charge transferred to us. Ask them to please print out a copy of the receipt and place it in my In-Box.

**Abbreviations and Acronyms**

Adj. Manual	VA's Adjudication Manual M21/1 - earlier versions exist
AO	Agent Orange
AWOL	Away without Leave
BVA	Board of Veterans Appeals
C & P Exam	Compensation and Pension Examination
CAVC	Court of Appeals for Veterans Claims
CRSC	Combat Related Special Compensation
CUE	Clear and Unmistakable Evidence (used to reopen a claim)
DAV	Disabled American Veterans (a veterans service organization)
DBQ	Disability Benefits Questionnaire

DIC	Dependency and Indemnity Compensation
DOD	Department of Defense
DRO	Decision Review Officer
EAJA	Equal Access to Justice Act
IU	Individual Unemployability
MST	Military Sexual Trauma
MVC	Missouri Veterans Commission
NOD	Notice of Disagreement
NOVA	Nat'l Organization of Veterans Advocates
NPRC	National Personnel Records Center
NVLSP	National Veterans Legal Services Program
OMPF	Official Military Personnel File
PTSD	Post-Traumatic Stress Disorder
RBA	Record Before the Agency
RO	Regional Office, see also VARO
RSVR	Ratings Veterans Services Representative
Adj. Manual	VA's Adjudication Manual M21/1 - earlier versions exist
AO	Agent Orange
AWOL	Away without Leave
BVA	Board of Veterans Appeals
C & P Exam	Compensation and Pension Examination
CAVC	Court of Appeals for Veterans Claims
CRSC	Combat Related Special Compensation
CUE	Clear and Unmistakable Evidence (used to reopen a claim)
DAV	Disabled American Veterans (a veterans service organization)
DBQ	Disability Benefits Questionnaire
DIC	Dependency and Indemnity Compensation
DOD	Department of Defense
DRO	Decision Review Officer
EAJA	Equal Access to Justice Act
IU	Individual Unemployability
MST	Military Sexual Trauma
MVC	Missouri Veterans Commission
NOD	Notice of Disagreement
NOVA	Nat'l Organization of Veterans Advocates

NPRC	National Personnel Records Center
NVLSP	National Veterans Legal Services Program
OMPF	Official Military Personnel File
PTSD	Post-Traumatic Stress Disorder
RBA	Record Before the Agency
RO	Regional Office, see also VARO
RSVR	Ratings Veterans Services Representative
SMC	Special Monthly Compensation
SMR	Service Medical Record
SOC	Statement of the Case
SSOC	Supplemental Statement of the Case
TDIU	Total Disability based on Individual Unemployability
VA	Veterans Administration
VAMC	Veterans Administration Medical Center
VARO	Veterans Administration Regional Office
VBM	Veterans Benefits Manual; aka "the bible"
VCAN	Veterans Claim Assistance Network
VSO	Veterans Service Officer
SMC	Special Monthly Compensation
SMR	Service Medical Record
SOC	Statement of the Case
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TDIU	Total Disability based on Individual Unemployability
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VCAN	Veterans Claim Assistance Network
VSO	Veterans Service Officer

### **Frequently Used Websites**

Department of Veterans Affairs - <https://www.va.gov>

VA Forms - <https://www.va.gov/vaforms/search>

**Defense Finance and Accounting Service - <https://www.dfas.mil>**

**Combat Related Special Compensation - <https://www.dfas.mil/retiredmilitary/disability/crsc.html>**

**VA -- M21 Adjudication Procedures Manual.**

[https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va\\_ssnew/help/customer/locale/en-US/portal/55440000001018/topic/55440000004049/M21-1-Adjudication-Procedures-Manual](https://www.knowva.ebenefits.va.gov/system/templates/selfservice/va_ssnew/help/customer/locale/en-US/portal/55440000001018/topic/55440000004049/M21-1-Adjudication-Procedures-Manual)

**Boards for Correction of Military/Naval Records**

Army - <https://arba.army.pentagon.mil>

Navy and Marine Corps- <https://www.secnav.navy.mil/mra/bcncr>

Air Force - <https://www.afpc.af.mil/Career-Management/Military-Personnel-Records>

**Discharge Review Boards**

Army - <https://arba.army.pentagon.mil>

Navy and Marine Corps- <https://www.secnav.navy.mil/mra/CORB/pages/ndrb>

Air Force - <https://www.afpc.af.mil/Career-Management/Military-Personnel-Records>