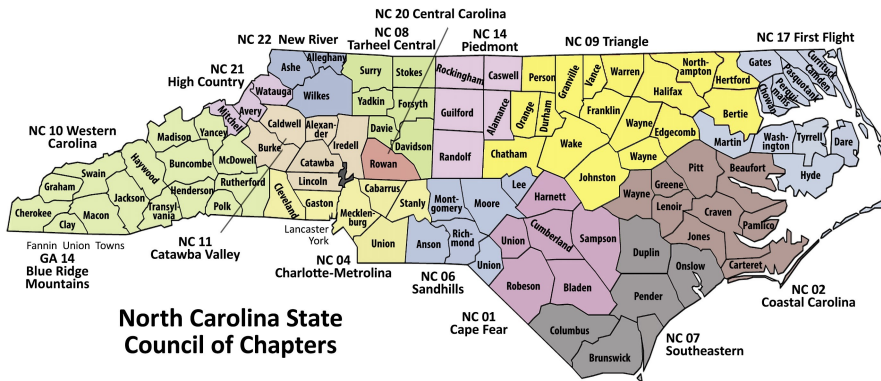


# NORTH CAROLINA COUNCIL NEWSLETTER



# PROPOSED AMENDMENTS TO THE COUNCIL BYLAWS

The bylaws amendment as approved by the Council Executive Committee on Friday, November 3, 2023 will be presented at the NCCOC business meeting on December 14, 2023 for a vote. Thus, we will be presenting two nominees for advocacy to the Council for a vote.

The motion would read:

## ARTICLE VIII-OFFICERS

**New** Section 1. The elected officers shall be a President, first vice President, second vice President, and a third vice President each of whom shall be a member of a chapter and also a member of national MOAA

**OLD** Section 1. The elected officers shall be a President, a First Vice President, and a Second Vice President.

## ARTICLE IX - COMMITTEES

**New** "Section 1. There shall be six standing committees: Executive Committee, two Legislative Affairs Committee (federal and state committee chairs), a Membership Committee, Nominating Committee, and a Finance Committee.

**OLD Section 1.** There shall be three standing committees: The Legislative Affairs Committee, the Nominating Committee, and the Finance Committee.

**New** Section 2. There will be two Legislative Affairs Committees - a Federal legislative committee and a State legislative committee. Each of the committees will be chaired by a Council VP. The committees are composed of chapter members appointed by the Chapter Presidents.

**Old** Section 2. The Legislative Affairs Committee shall be chaired by one of the Council Vice Presidents selected by the President. The membership of this committee will be composed of the legislative chairs of all the member chapters.



# NOMINATION COMMITTEE

Chapter Presidents and currently serving Council Officers:

On December 14, 2023, the North Carolina Council of Chapters will be voting to fill the president's and three vice-presidents' positions. Below are position requirements:

## *President:*

- The NCCOC president serves as the chief executive officer and official representative of the council.
- Presides at all council and executive committee meetings.
- Appoints standing and special committees, subject to the approval of the council.
- Acts as an ex-officio member of all committees with voting rights on all except the nominating committee.
- Confers with the secretary regarding contents of notices of meetings, meeting agendas, and distribution of minutes.
- Confers with other officers and chairs regarding their respective duties.
- Be familiar with the NCCOC Bylaws, "Council and Chapter Policies and Procedures Guide", and national MOAA Strategic Plan.
- Must be a national MOAA member.

## *Vice-Presidents:*

### *Vice-President/Membership Chair*

- Chairs the membership committee.
- Oversees the committee's efforts to retain existing members and recruit new ones.
- Maintains the council CM with MOAA national.
- Ensures all council and chapter officers are national MOAA members.
- Coordinates with chapters to ensure upkeep of chapter committee modules. The VP of membership must be able to teach classes on the CM
- Maintains records on chapter growth, losses, and retention using the CM.
- Be familiar with the NCCOC Bylaws, "Council and Chapter Policies and Procedures Guide", and national MOAA Strategic Plan.
- Must be a national MOAA member.

### *Vice-President/Legislative Committee Chair-National Advocacy*

- Executive advocacy-related tasks as directed by the council.
- Ensures a designated chapter legislative chair or liaison is assigned to each congressional district and that all 170 General Assembly members are contacted as needed and to reach "green" status.
- Ensures representation is sent to Washington for the annual AIA.
- Creates and executes an annual legislative plan.
- Be familiar with the NCCOC Bylaws, "Council and Chapter Policies and Procedures Guide", and national MOAA Strategic Plan.
- Must be a national MOAA member.

### *Vice-President/Legislative Committee Chair-State Advocacy*

- Executive advocacy-related tasks as directed by the council.
- Ensures a designated chapter legislative chair or liaison is assigned to each congressional district and that all 170 General Assembly members are contacted as needed and to reach "green" status.
- Ensures representation is sent to Washington for the annual AIA.
- Creates and executes an annual legislative plan.
- Be familiar with the NCCOC Bylaws, "Council and Chapter Policies and Procedures Guide", and national MOAA Strategic Plan.
- Must be a national MOAA member.

*Vice-Presidents additional duties as determined by the Council president.*

Serves as parliamentarian.

Performs the duties of the president in the event of temporary disability or absence of the president.

Succeeds to the office of the president in the event of a vacancy during a given term.

Assist the president when called upon.

Stays informed about the health of member chapters along with Council president.

"Former chapter officers and chapter delegates are well suited for council leadership positions, but current chapter delegates should not simultaneously serve as elected officials on the council."

THE BYLAWS OF NORTH CAROLINA STATE COUNCIL OF CHAPTERS, LLC, MOAA, ARTICLE VIII: OFFICERS, Section 1. determines how often an election is held. Each chapter president will have one vote for each position. The bylaws states that "Proxy voting shall not be permitted at meetings of the Council", ARTICLE V: VOTING, Section 3.

Jim Brumit

COL, AUS, Retired

Immediate Past President and Nominations Committee Chairman, NCCOC, MOAA

### **North Carolina MOAA Chapter Presidents, Currently Serving Council Elected Officers, Secretary and Treasurer**

I am pleased to announce the following officers are nominated to the North Carolina Council of Chapters elected positions. We will vote on the nominations on December 14, 2023 at the NCCOC Annual Business Meeting. Details will be forthcoming from the Council president.

**President: CW4 (Ret) Jay E. Garbus, USA (second term)**

**VP Membership: CDR (Ret) Ken Klassen, USN (second term)**

**VP Advocacy: COL Dana Tucker, USA (first term)**

**VP Advocacy: LTC (Ret) Patricia Anne Vinson (first term)**

There will be two VPs of Advocacy going forward in order provide the very best advocacy program for the Council and chapters. The chapter presidents will appoint committee membership for both advocacy programs and membership. Details to follow.

I will email the applications for each of the above so that you will know more about the nominees.

The Nominations Committee wishes to thank all applicants and encourage you to consider applying in the future.

Jim Brumit

COL, USA, (Ret)

Immediate Past President/Nominations Chairman



## REPORT FROM 1ST VP Kenneth W. Klassen, CDR USN( Ret)

80 MOAA members and guests from North Carolina and other states enjoyed a Veterans five day cruise from Charleston, SC to the Bahamas November 11-16, 2023. Pictures are included from pleasant days at sea and two port visits in Nassau and Half Moon Cay, Bahamas. The cruise was open to all MOAA members from the 14 MOAA Chapters in North Carolina and their guests. We had guests from as far away as California and Boston, MA. A special feature of the Veterans Cruise was a four part lecture series on major Pacific campaigns in WW II, including the Battle of the Coral Sea, Midway, Guadalcanal, Leyte Gulf, Okinawa and the dropping of the atomic bombs in August 1945. MOAA and Southeastern Chapter (NC-07) member Ron Henderson, RDML USN(Ret) was our featured speaker.

Social times were the order of the day and night as we spent time with friends from NC Chapters and made many new friends during excursions, meals, casual visits around the ship decks and Veterans Appreciation events scheduled by the ship's cruise director. It was warm and sunny on the beaches and around the pool and spas onboard.

Thanks to our tour agent and the onboard staff, a private appreciation cocktail party was included as an amenity for MOAA guests on the last day at sea. The party was enjoyed by all attendees and when asked if they would like another cruise next year, a hearty response was heard from all. Wonderful memories, enjoyable days at sea, educational lectures, great food and accommodations are hard to beat!



L to r CDR Kenneth Klassen, President Capt Donna Culp, and Jhon Culp, for the great work she has done for Western Carolina, Secretary - Mrs. Sue Harris, (SOM) and Council President Jay E. Garbus



## Published by the North Carolina Council of Chapters of MOAA

**OUR MISSION STATEMENT** is in concert with the Military Officers Association of America purposes and objectives. The goal is to foster fraternal relations among retired, active, and former officers of the uniformed services and their Reserve and National Guard components. Our aim is to actively promote the protection of the rights and interests of members of the uniformed services, their family members, including survivors, provide useful services for members and their families, and serve the community, the active military forces (past, present, and future) and our nation.

**Publisher and Editor** – CW4 Jay E. Garbus, USA (Ret) and Sue Harris (SOM)

**Editor** may be reached at (704) 400-0160 or [jegarbus@gmail.com](mailto:jegarbus@gmail.com)

**The Newsletter** is published for members and friends of North Carolina Council of Chapters, MOAA.

**Editorial Policy:** The North Carolina Council of Chapters is affiliated with national MOAA. As such, the North Carolina Council of Chapters is nonprofit, politically nonpartisan. Editorial policies are established by the North Carolina Council of Chapters Publisher and Editor and are in consonance with MOAA's.

Advertising and sponsorship are accepted based on MOAA policies and standards.

**Chapter Website** - [www.moaa-nc.org](http://www.moaa-nc.org)

**MOAA "Take Action"** [http://www.moaa.org/take Action/](http://www.moaa.org/takeAction/)

A current issue of the newsletter can be found on the North Carolina Council of Chapters website, [www.moaa-nc.org](http://www.moaa-nc.org). Anyone wishing to receive this newsletter by e-mail may do so by contacting us using the "Contact Us" link

For all Council Members including NCCOC Committee Chairpersons, Chapter Presidents and Chapter Membership Officers:

Recommend review of the NCCOC Website for updated information concerning posted NC Chapter reports. There also is a wealth of information from our 14 Council Chapters within the state for your information that gives excellent ideas and keeps all of us informed about what is happening in supporting the mission of MOAA. Log onto the website at: [www.moaa-nc.org](http://www.moaa-nc.org) for the latest on Chapters,

Leadership positions, the President's Newsletter, Legislative issues, Surviving Spouse Liaison and much more. For those in Chapter and Council Leadership positions, there is a protected backroom with restricted access to Council contact information, Semi-annual and Officer Reports from all NC Chapters of MOAA.

There are a few recent format changes to requested Chapter Semi-annual and Chapter Officer Reports in the backroom. That information is very helpful for Council and Chapter Leaders in connecting and sharing ideas with others in NC. For questions, comments or assistance with access, please email or call Ken Klassen, VP-1 for Membership.

End of Year reports are due. Please fill out and send in.

Thanks,

## Minutes of the 4 October 2023 Council Board Meeting

The monthly meeting of the NCCOC was held virtually and called to order at 1008 on Wednesday, 4 October by President CW4 Jay Garbus, USA (Ret). Lacking one person for a quorum, there would be no motions or voting.

Approval of the August and September minutes were tabled until next month due to a lack of a quorum.

COL Ken Hillman, USMC (Ret) gave the treasurer's report. We have a surplus in the budget.

President CW4 Jay Garbus, USA (Ret) reported:

All LOE presentations will be made by region.

Election of officers will be held at the December 14<sup>th</sup> meeting.

COL Herb Segal, USA (Ret) reported that the Triangle Chapter 60<sup>th</sup> Anniversary dinner has around 40 people signed up but there is still time to make a reservation with Chris Froeschner.

COL Iggi Husar, USA (Ret) presented an overview of the ROA (Reserve Organization of America). Senior enlisted personnel are eligible to join.

CW4 Jay Garbus reminded everyone to contact COL Jim Brumit, USA (Ret) if you are interested in running for a council office.

Dr. Vivianne Wersel, D. Aud., (SSL) reported no advocacy news.

The September SSL Training had a good turnout. The three who were unable to attend will be trained in October. Would like a "Completion of Training" Certificate. The SSL Advisory Council is approving it.

Jay has created an SSL Certificate but Vivianne asked what the purpose of it is since Surviving Spouses are full members of MOAA. It could be a Chapter's prerogative whether to present it. Jay will send a copy to Vivianne. It should be a requirement that Chapter SSLs join the virtual chapter so they can invite new Surviving Spouses to join it. It meets every other month and provides good information.

Open Floor:

Capt. Donna Culp, USAF (Fmr) reported on:

the Georgia MOAA Conference 2023 she attended in Georgia. It was held at the University of North Georgia campus, The Military College of Georgia.

Veterans Stand Down in Franklin

Arrangements for Capt. Frederick Hall, USAF return to North Carolina after being Killed in Action in Vietnam 54 years ago.

Herb Segal asked that the airline be notified of his presence on the plane for respectful treatment.

Sue Harris related a recent 100<sup>th</sup> birthday celebration for a former Vietnamese POW which was attended by four other former Vietnam POWs.

Herb Segal said that Triangle Chapter is remaking their website and will send the YouTube link for the scholarship awards and for the anniversary celebration.

COL Jeri Graham, USA (Ret) asked about the 50<sup>th</sup> commemoration of the Vietnam War.

Herb moved that the meeting be adjourned. It was seconded and passed. The meeting adjourned at 10:50.



## Minutes of the 21 September 2023 Council Board Meeting

The monthly meeting of the NCCOC was held virtually and called to order at 1000 on Thursday, 21 September by President CW4 Jay Garbus, USA (Ret). A quorum was present with five Chapter Presidents and a guest in attendance.

Approval of the August minutes were tabled until next month due to late distribution of them.

COL Ken Hillman, USMC (Ret) gave the treasurer's report. We have a surplus in the budget.

President CW4 Jay Garbus, USA (Ret) reported:

ROA (Reserve Organization of America) wants us to join them and they join us. COL Iggi Husar USA (Ret) is the current president of ROA. Should we invite him to tell us more? Consensus of the group is to invite him to speak.

All NC Chapters that submitted for LOE received 5 stars. COL Jeri Graham USA (Ret) stated that they will be awarded at Regional meetings. Our region will meet within a year. Only one Virtual Chapter got the LOE because the measurements do not fit a Virtual Chapter.

Immediate Past President COL Jim Brumit, USA (Ret) is the chairman of the Nominating Committee. He has been in contact with the other members of the nominating committee: CAPT David Lee, USNR (Ret); COL Jeri Graham, USA (Ret); and Capt. Donna Culp, USAF (FMR). An email will be sent to all Chapter Presidents and the elected members of Council regarding the nominations and the time frame.

1<sup>st</sup> Vice President CDR Ken Klassen, USN (Ret) reported:

The officer roster is under Council Business.

Officer Reports are in the back room.

Updates are needed ASAP since older ones will be scrubbed soon.

There is a new form for NCCOC Chapter Officer Reports. Please send them to LT Tracy Young, USA (Ret) and CC to CDR Ken Klassen, USN (Ret).

Six Chapter semi-annual reports are missing. They were due July 31. Please complete and send to LT Young.

Beginning in the spring of 2024 there will be a new national database and chapter presidents will have access to people who have moved to your area. This should help recruiting new members.

We need officer contact information and a picture of the president of Piedmont Chapter.

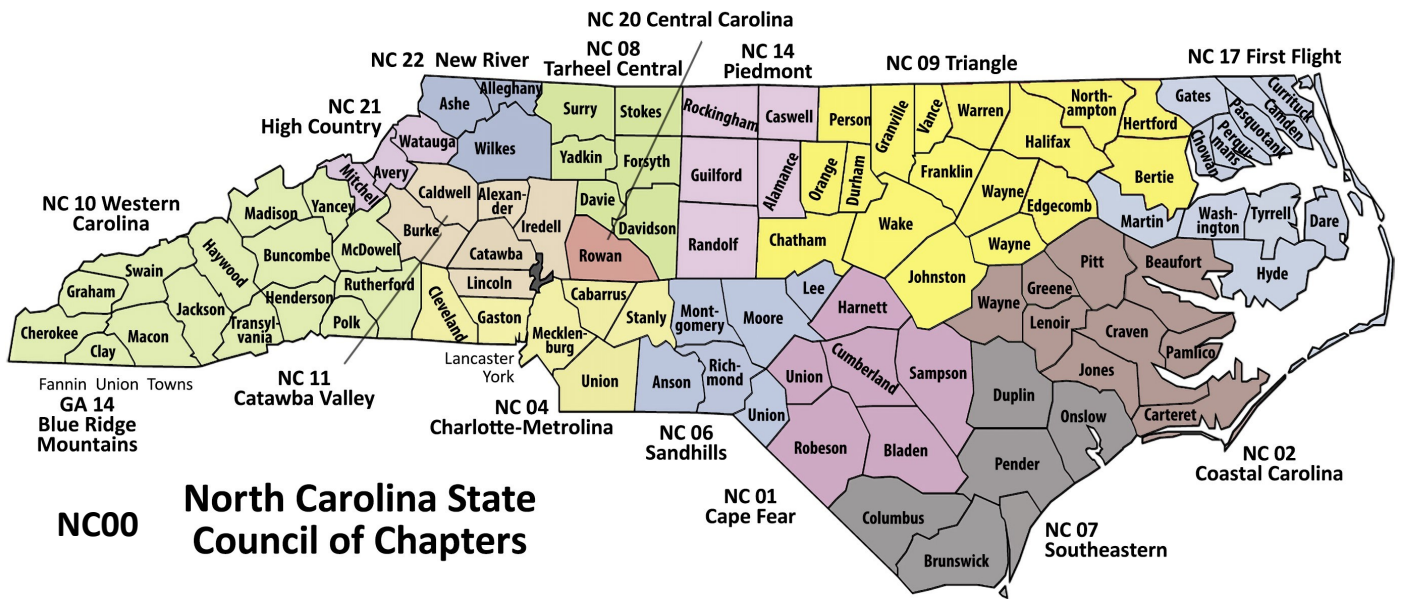
2<sup>nd</sup> Vice President LCDR Mark Sandvigen USN (Ret) reported:

- ⇒ Disappointment that the Maj. Richard Star Act did not move forward to **MDAA**. Most of Congress who did not endorse it was because Advocacy Center keeps a log of communications to Representatives and Senators. Mark recommends recognition of those who consistently contact them. He has asked for a database for NC.
- ⇒ Voter ID cards can be military ID, driver's license, or go to your county election board and get one.
- ⇒ COL Tricia Vinson, USA (Ret) reported that the NC appropriations bill is out of committee. It looks like nothing added for veteran issues. Seventeen bills were introduced that were primarily for veteran issues but only 7 made the crossover list. Veteran issues were not a priority, even with bills that do not require money or much money.
- ⇒ Less than 30% of NC bills that are passed and signed by the governor are not implemented by the department. An example is the military spouse licensure bill.
- ⇒ What happens with the four National cemeteries in NC that are not full?
- ⇒ Military Veterans' Affairs has new leadership with two different funds (operational and perpetuity) but their hands are tied to use the funds. Operational funds have not increased.
- ⇒ Chapter presidents will be asked for names of members to help with the Advocacy team.
- ⇒ Come to Raleigh in person. The NC Veterans Council will coordinate visits. Work with NC Veteran's Council.
- ⇒ they didn't know the cost. Only about 50,000 would qualify. Will try again next year.

COL Jeri Graham, USA (Ret) offered her help if needed for the specific wording of a physician's letter for the PACT Act application. The order is to have a pre-screening, then speak with your county Veteran's Affairs Office, and collect all papers in a folder (such as DD 214). Then set an appointment with the County Veterans Affairs Office.

Capt. Donna Culp, USAF (Fmr) spoke about Capt. Frederick Hall, USAF, killed in action in Vietnam and whose remains were identified in March. He will arrive at Greenville-Spartanburg Airport on October 8<sup>th</sup> and his funeral and burial will be October 10<sup>th</sup> in Waynesville, NC.

Frankie Groff moved that the meeting be adjourned. It was seconded and passed. The meeting adjourned at 11:15.



# NORTH CAROLINA



# COUNCIL OF CHAPTERS

## CHAPTER PRESIDENTS



- (NC01) - Cape Fear—COL Richard A. Underwood, USA, (Ret)
- (NC02) - Coastal Carolina—CAPT Randall Ramian, USN, (Ret)
- (NC04) - Charlotte-Metrolina—LTC Joe Anderson, USA, (Ret)
- (NC06) - Sandhills—Col. Walter Havenstein, USMC, (Ret)
- (NC07) - Southeastern—Col. Joseph (Joe) Irrera, USMC, (Ret)
- (NC08) - Tarheel Central—Lt. Col. Greg Chase, USAF (Ret)
- (NC09) - Triangle—COL Herb Segal, USA, (Ret)
- (NC10) - Western Carolina—Capt. Donna Culp, USAF, (FMR)
- (NC11) - Catawba Valley—LTC Clifford (Davey) Davenport, USA, (Ret)
- (NC14) - Piedmont—LTC Lee F Richmond, USAF (Ret)
- (NC17) - First in Flight— LCDR Al DelGarbino, USCG, (Ret)
- (NC20) - Central Carolina—LTC Gary Applewhite, USA, (Ret)
- (NC21) - High Country—Frankie Groff (SSL)
- (NC22) - New River—LCDR Steve Tucker, USN, (Ret)

## COUNCIL COMMITTEES

### Executive Committee

1. President CW4 Jay Garbus, USA (Ret)
2. 1<sup>st</sup> Vice President CDR Kenneth Klassen, USN (Ret)
- 3.. 2<sup>nd</sup> Vice President LCDR Mark Sandvigen, USN (Ret)
4. Immediate Past President COL Jim Brumit, USA (Ret)
5. Secretary Mrs. Sue Harris (SOM)— nonvoting
- 6, Treasurer Col Ken Hillman, USMC (Ret)
7. Surviving Spouse Liaison Dr. Vivianne Wersel (SSL)

### Nominating Committee

1. Immediate Past President - COL Jim Brumit, USA (Ret)
2. Chapter President - Capt Donna Culp, USAF (FMR)
3. COL Jeri Graham, USA (Ret)
4. CAPT David Lee, USNR (Ret)

### Finance Committee

1. President - CW4 Jay Garbus, USA (Ret)
2. Treasurer - Col Ken Hillman, USMC (Ret)
3. Immediate Past President - COL Jim Brumit, USA (Ret)



NORTH CAROLINA  
COUNCIL OF CHAPTERS



CW4 Jay E. Garbus, USA (Ret)  
President

Cell - 704-400-0160  
Email - jegarbus@gmail.com



# AMBA

ASSOCIATION MEMBER BENEFITS ADVISORS

TOGETHER WITH TRUIST

# TRUIST



Veterans Bridge Home

704-332-8802



NCServes in collaboration with NCCARE360

Military rank and abbreviation's used for all written documents. I sometimes forget which way is proper so this is a helpful guide to use.

Rank Insignia of the United States Armed Forces										
OFFICERS										
O-1	O-2	O-3	O-4	O-5	O-6	O-7	O-8	O-9	O-10	Special
<b>AIR FORCE</b>										
Second Lieutenant (2d Lt)	First Lieutenant (1st Lt)	Captain (Capt)	Major (Maj)	Lieutenant Colonel (Lt Col)	Colonel (Col)	Brigadier General (Brig Gen)	Major General (Maj Gen)	Lieutenant General (Lt Gen)	General (Gen)	General of the Air Force (GAF)
<b>ARMY</b>										
Second Lieutenant (2LT)	First Lieutenant (1LT)	Captain (CPT)	Major (MAJ)	Lieutenant Colonel (LTC)	Colonel (COL)	Brigadier General (BG)	Major General (MG)	Lieutenant General (LTG)	General (GEN)	General of the Army (GA)
<b>MARINES</b>										
Second Lieutenant (2ndLt)	First Lieutenant (1stLt)	Captain (Capt)	Major (Maj)	Lieutenant Colonel (LtCol)	Colonel (Col)	Brigadier General (BGen)	Major General (MajGen)	Lieutenant General (LtGen)	General (Gen)	
<b>NAVY</b>										
Ensign (ENS)	Lieutenant Junior Grade (LTJG)	Lieutenant (LT)	Lieutenant Commander (LCDR)	Commander (CDR)	Captain (CAPT)	Rear Admiral Lower Half (RDML)	Rear Admiral Upper Half (RADM)	Vice Admiral (VADM)	Admiral (ADM)	Fleet Admiral (FADM)
<b>COAST GUARD</b>										
Ensign (ENS)	Lieutenant Junior Grade (LTJG)	Lieutenant (LT)	Lieutenant Commander (LCDR)	Commander (CDR)	Captain (CAPT)	Rear Admiral Lower Half (RDML)	Rear Admiral Upper Half (RADM)	Vice Admiral (VADM)	Admiral (ADM)	Fleet Admiral (FADM)
<b>WARRANT OFFICERS</b>										
<b>ARMY</b>					<b>MARINES</b>					
Warrant Officer (WO1)	Chief Warrant Officer (CW2)	Chief Warrant Officer (CW3)	Chief Warrant Officer (CW4)	Chief Warrant Officer (CW5)	Warrant Officer (WO)	Chief Warrant Officer (CWO2)	Chief Warrant Officer (CWO3)	Chief Warrant Officer (CWO4)	Chief Warrant Officer (CWO5)	
<b>NAVY</b>					<b>COAST GUARD</b>					
The grade of Warrant Officer (WO) is no longer in use.	Chief Warrant Officer (CWO-2)	Chief Warrant Officer (CWO-3)	Chief Warrant Officer (CWO-4)	Chief Warrant Officer (CWO-5)	The grade of Warrant Officer (WO) is no longer in use.	Chief Warrant Officer (CWO-2)	Chief Warrant Officer (CWO-3)	Chief Warrant Officer (CWO-4)	Chief Warrant Officer (CWO-5)	The grade of chief Warrant Officer (CWO-5) is no longer in use.

# 2024 Roundtable Schedule

January 18* Association Management System	February 29 Levels of Excellence	March 28 Advocacy in Action	April 25 Marketing
May 23 Awards Program	June 27 Generational Recruiting	July 25 Chapter Health Update	August 22 Council/Chapter Visit Program
September 26 Legal Topics	Oct 24 Community Outreach	November 21* Harris Communication Award	December 19* 2024 review 2025 preview

\* Adjusted from 4<sup>th</sup> Thursday to Avoid Conflict



## 2024 Leader Training Workshops



**Leadership Seminar**  
Orlando, FL  
January 25-27  
FL, Other C&C by invitation

**Virtual Workshop**  
New Leaders  
March 13-14  
Focused on New Chapter Leaders

**South Workshop**  
TBD  
May 10-11  
AL, GA, KY, MS, NC, SC, TN, VA

**Virtual Workshop**  
Experienced Leaders  
August 14-15  
Focused on Experienced Leaders

**West Workshop**  
TBD  
November 15-16  
AL, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY



## CHAPTER NEWS

### CAPE FEAR CHAPTER NC-01

Cape Fear website.

\* **Correspondence should be sent to:** Cape Fear Chapter, MOAA, P.O. Box 53621, Fayetteville, NC 28305

### COASTAL CAROLINA CHAPTER NC-02

\* Coastal Carolina website.

\* **Correspondence should be sent to:**

Coastal Carolina Chapter, MOAA, P.O. Box 373, Havelock, NC 28532

## CHARLOTTE-METROLINA CHAPTER NC-04



President elect  
LtCol Nelson English, USAF (RET)

### Ron Wilsbach Outstanding Service Award



President Joe Anderson, Ron Wilsbach, Ron Morgan, Jay Garbus

## SANDHILLS CHAPTER, MOAA NC-06

\* [Sandhills website](#)

\* **Correspondence should be sent to:** Sandhills Chapter, MOAA, PO Box 4205, Pinehurst, NC 28374

## SOUTHEASTERN NC CHAPTER NC-07

### INFORMATION ON JOINING THE CHAPTER

Membership in the SENCLAND chapter is open to anyone who holds or has ever held a commission or warrant in any component of the Army, Marine Corps, Navy, Air Force, Coast Guard, Public Health Service or National Oceanic and Atmospheric Administration and their surviving spouses. Please contact Membership Chair Col(Ret)Al Schroetel at 910.252-4378 or [downeast@bellsouth.net](mailto:downeast@bellsouth.net) for information about our Chapter.

## THE TARHEEL CENTRAL CHAPTER NC-08

[Tarheel Central website](#)

\* **Correspondence should be sent to:** TarHeel Central Chapter, MOAA,  
805 Arbor Oaks Drive, Winston Salem, NC

## THE TRIANGLE CHAPTER NC-09

\* Triangle Chapter website.

\* **Correspondence should be sent to:** Triangle Chapter, MOAA, PO Box 19861, Raleigh, NC 27619

## WESTERN CAROLINA CHAPTER NC-10



Western North Carolina Chapter of the Military Officer's Association of America.  
WNCMOAA, Inc., P.O. Box 1984, Hendersonville, NC 28793 • [Feedback](#)

## CATAWBA VALLEY CHAPTER NC-11

The MOAA Catawba Valley Chapter covers six counties: Alexander, Burke, Caldwell, Catawba, Iredell and Lincoln. Our chapter is active in the community through its Benevolent Fund (explained above) and JROTC support. The chapter also engages in ad hoc charitable support and activity, with emphasis on homeless Veterans. Please note that National MOAA and its affiliated chapters are nonpartisan, without any political party affiliation, bias, or designation. A one-page chapter membership mail-in application form is available via the "Join Chapter" button on our chapter website homepage at: [www.moaacvc.org](http://www.moaacvc.org). Also, you can learn more about MOAA National and join at either Basic, Premium or Life level by visiting their website: [www.moaa.org/content/join-moaa/why-join-moaa](http://www.moaa.org/content/join-moaa/why-join-moaa)

## PIEDMONT CHAPTER NC-14

**Correspondence should be sent to:** Piedmont Chapter, MOAA, 545 Morton Ave,  
Asheboro, NC 27205

## FIRST FLIGHT CHAPTER NC-17

Address	PO Box 50
City, State, Zip	Shiloh, NC 27974-0050
Meeting Time	1st Tuesday
Meeting Place	Currently not meeting due to COVID 19
Council Website	<a href="http://www.moaa-nc.org">http://www.moaa-nc.org</a>



## CENTRAL CAROLINA CHAPTER NC-20

**Correspondence should be sent to:** Central Carolina Chapter, MOAA, Rufty-Holmes Senior Citizens Center, Martin Luther King Jr. Avenue, Salisbury, NC 28144

## HIGH COUNTRY CHAPTER NC-21

High Country website

**\* Correspondence should be sent to:** High Country Chapter, MOAA, PO Box 3312, Boone, NC 28607



As members of High Country Chapter MOAA, we have a common bond, a single thread . . .

. . . We have all served our country or experienced military service either individually or as a Surviving Spouse.

. . . In our 19 year history, we have continually come together to serve our community, enhance relations with area military organizations, and fostered fraternal relations with those who serve or who have served.

. . . We have “built” a Veterans Memorial, conducted community programs on Memorial and Veterans' Day for 14 years, provided funding and experience to ASU ROTC and WHS MCJROTC, cleaned highways, provided funding for Wounded Warriors at App Ski Mtn, supported ASU Student Veterans, fed Veteran Bike Riders, supported Blue Star Mothers and Frontline to Farm and placed flags on 610 veterans' grave sites for Memorial Day and Veterans' Day.

*We “Never Stop Serving”*

## NEW RIVER CHAPTER NC-22

**Correspondence should be sent to** New River Chapter, MOAA, PO Box 1202, Jefferson, NC 28640

# REFERENCE INFORMATION SECTION

## MOAA GUIDANCE ON PARTISAN POLITICAL ACTIVITIES

### PARTISAN POLITICAL ACTIVITIES

As organizations exempt from federal taxation under Sec. 501(c)(19) of the Internal Revenue Code, MOAA and its affiliates must take care to avoid engaging in partisan political activities. Under IRS rules, we are prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for public office.

### CANDIDATES FOR PUBLIC OFFICE

A candidate for public office is an individual who offers himself or herself, or is proposed by others, as a contestant for an elective public office, whether such office is national, state, or local, and includes incumbent candidates. The prohibition also extends beyond declared candidates and may apply to efforts to recruit an individual to run for office or advance exploratory activities. The prohibition also applies to advocating for the platform of one political party over another.

### PROHIBITED ACTIVITIES

Activities which constitute participation or intervention in a political campaign on behalf of or in opposition to a candidate include, but are not limited to, the publication or distribution of written or printed statements or the making of oral statements on behalf of or in opposition to such a candidate.

It is clear that the prohibition on partisan political activity prohibits such outright actions such as posting a “Vote for Biden” or “Vote for Trump” on the organization’s website, or “Support Republican Candidates” or “Vote Democratic.”

In addition to these obvious examples, the prohibition goes well beyond direct expressions of support. In determining whether an organization is engaged in unlawful partisan political activities, the IRS applies a “facts and circumstances” test. The IRS looks not only to the expressed language, but to external factors, such as the communication’s timing, its targeted audience, and how the message relates to public policy positions that distinguish a candidate in a campaign.

### CONSEQUENCES FOR VIOLATIONS

The consequences to an organization that violates the prohibition on partisan political activity can be severe including the loss of its tax exempt status and the imposition of certain excise taxes. For public charities, like The MOAA Foundation and the MOAA Scholarship Fund, the IRS can disallow tax deductions for charitable contributions. In addition, for an organization whose mission involves advocacy on key military community issues, MOAA must seek support from elected representatives from both parties.

Engaging in partisan political activities on behalf of one party or candidate would seriously undermine MOAA’s ability to achieve the bipartisan consensus on key issues essential to achieving its legislative objectives.

# **MOAA GUIDANCE ON PARTISAN POLITICAL ACTIVITIES, CONTINUED**

## **PERSONAL OPINIONS**

As individuals, members and leaders of MOAA and MOAA's affiliates are not prohibited from engaging in partisan political activities so long as they do so in way that makes it clear they are acting for themselves and do not appear to be speaking on behalf of MOAA or its affiliates. For example, it is permissible for an individual to express his or her personal preference in support of or in opposition to a candidate or political party. And they may do so publicly.

However, when expressing their personal opinions or preferences, they may not make reference to their MOAA position, use MOAA communications channels, use MOAA letterhead or newsletters, identify themselves as MOAA leaders, or imply that MOAA or its members share their beliefs.

## **LEADERSHIP RESPONSIBILITIES**

Those in leadership positions have a special responsibility to separate their personal political opinions from statements that are or can be attributed to MOAA or its affiliates. For example, it is improper for a chapter leader to use the chapter's newsletter to advance the leader's personal political beliefs.

This goes beyond statements expressly advocating for a specific candidate or party by name. Statements that incorporate campaign messaging, campaign slogans, and political positions identified with a particular candidate or party are also prohibited. No MOAA leader is authorized to use MOAA's or an affiliate's resources to communicate their personal political beliefs. This is an outright violation of the leader's fiduciary duty to the organization and a serious leadership and ethical failure.

## **DIVISIVE SOCIAL ISSUES**

We are all aware of the divisive nature of the debate over today's leading social issues – protesting during the national anthem at sporting events, racial justice, public protests, and the conduct of law enforcement officers. These are issues over which many Americans have deeply held, but differing, personal beliefs. This is also true within the military community among the ranks of active duty and retired officers and within MOAA itself.

MOAA leaders have an obligation to keep this in mind when communicating on behalf of MOAA or its affiliates. Suggesting that MOAA only supports one side of a deeply divisive issue sends a message to those with a different belief that MOAA is not for them.

Officers today have grown up in a military culture that is very different than the past. Many are accepting of attitudes and views that were not mainstream when many of us were in uniform. If MOAA is going to connect with the newest generation of uniformed officers, it needs to be clear that those with strong views on racial and social justice imperatives are just as welcome as those who adhere to more traditional expressions of patriotism and officership.

## MEMBERSHIP RETENTION

- ⇒ Some specific factors that can present retention obstacles are:
- ⇒ Vague chapter mission and focus.
- ⇒ Age (perception that a chapter is for older people only and the fact that some older members can't always attend meetings).
- ⇒ Repetitive or uninteresting activities.
- ⇒ Members, especially new members, feeling unwelcome due to cliques or inattention.
- ⇒ Lack of attachment to a community.
- ⇒ To overcome retention obstacles, chapter leaders might want to consider these strategies:
- ⇒ Have a welcoming committee.
- ⇒ Remind chapter members to openly and warmly greet potential new members and socialize with them when they arrive at a chapter function.
- ⇒ Recognize affiliate officers and members with awards for outstanding performance. See [MOAA.org/MOAA-chapter-awards](http://MOAA.org/MOAA-chapter-awards) for local and national recognition programs.
- ⇒ Perform individual recognition ceremonies and present awards at meetings.
- ⇒ Use a website or newsletter to recognize accomplishments of members and publish biographies.



### WHY JOIN MOAA

The Military Officers Association of America (MOAA) is the country's leading organization protecting the rights of military servicemembers and their families. Those who belong to MOAA not only lend their voices to a greater cause, but they also gain access to extensive benefits tailored to the needs and lifestyles of military officers. MOAA members proudly hail from every branch of the uniformed services. To them, we have made the same promise that they have made to their country: Never Stop Serving.

Website [MOAA - Why Join MOAA](#)

**JOIN US** - Join a North Carolina Chapter at our website [www.moaa-nc.org](http://www.moaa-nc.org) and click **JOIN NOW** menu.

# Chapter Overview

## The healthy chapter:

- Chapter purpose/mission
- Legislative advocacy/engagement
- Impactful community service
- Membership growth

## How we can measure accomplishment and sustainability:

- Use of committee module/other electronic tools
- Up-to-date leadership roster
- Recruiting and retention statistics
- Use of sponsorship and grant programs
- National and Council engagement
- Training involvement and collaborative engagement



## Affiliate Checklist- P1



Have a stated and known mission



Officer familiarity with the MOAA website and Policies and Procedures Guide



Subscribe to *The MOAA Newsletter*



Proactively address renewals



Have a succession plan



Regularly submit awards nominations



Update Committee Module roster and check Near Real Time Report monthly



# Affiliate Checklist-P2



Use existing technology/tools



Publish a newsletter (print or electronic)



Have a well-maintained website and social media presence



Regularly engage with Council and national Council and Chapter Affairs



Regularly attend offered training



Engage in community service and advocacy activities



Engage with other Military and Veteran Service Organizations/Coalitions/  
Chamber of Commerce



## Self-Assessment

- [www.moaa.org](http://www.moaa.org) > chapter resources > chapter administration > self-assessment
- **CHAPTER MEMBERSHIP:**
- **CHAPTER ADMINISTRATION**
- **CHAPTER ACTIVITIES**
- **CHAPTER COMMUNICATION**
- **EVALUATION**





## MOAA SURVIVING SPOUSE NEWS

All eight members of the Surviving Spouse Advisory Council (SSAC) were among the nearly 200 MOAA members, leaders, and staff who participated in the association's annual Advocacy in Action event April 26 to meet with legislators about several important issues. (Learn more about these issues at [MOAA.org/AiA](https://MOAA.org/AiA).)

By the time the day was over, SSAC members visited with about 60 legislators and/or their staffs from seven states. Each came away feeling the message was well received and the experience was positive.

SSAC member Dr. Vivianne Wersel said the event gave her the opportunity to cultivate relationships with members and staffers from North Carolina as well as with other MOAA members.

Barb Smith, of Virginia, thought it was a great experience and, because this was her second time participating, she felt more confident and involved.

Capt. Kathy Thorp, USN (Ret), a MOAA board member and surviving spouse, summed up her experience: "Every time I visit the Hill, there is an underlining thrill of excitement. To walk the halls and witness the everyday rhythm of our democracy in action is something everyone should do in their lifetime. To witness MOAA in full force, with chapter and council presidents, surviving spouses, board members, and MOAA staff advocating for our military and their families, surviving spouses, and our veterans, always brings me overwhelming pride to be able to volunteer my time and energy for this organization."

SSAC members already are looking forward to 2024 when they can once again be "lobbyists for a day."

# Surviving Spouse Resources and Links

This page is designed to provide resources to surviving spouses and answer some of the more frequent asked questions of MOAA regarding survivor issues. Access more MOAA resources by visiting [MOAA.org](https://www.moaa.org) or [MOAA's Surviving Spouse page](#); learn more about joining MOAA [here](#).

(Jump directly to [Suggested Reading](#) or information about [Survivor Organizations](#).)

**Q. What is the latest on efforts to repeal the Survivor Benefit Plan-Dependency and Indemnity Compensation (SBP-DIC) offset, also known as the "widows tax"?**

A. Efforts by MOAA and others to repeal this unfair law resulted in a phased removal of the repeal becoming law as part of the FY 2020 National Defense Authorization Act. Click [here](#) for the latest information.

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**Q. How do I reach out to MOAA's Surviving Spouse Advisory Council?**

A. Email the council at [sscomm@moaa.org](mailto:sscomm@moaa.org). Meet the members [here](#).

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**Q. How do I reach out to, or join, MOAA's Surviving Spouses Virtual Chapter?**

A. Email the virtual chapter at [mssvc02@gmail.com](mailto:mssvc02@gmail.com). You can also [join the chapter's Facebook group](#) to find details on membership, upcoming meetings, and other resources. Apply using [this form](#).

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**Q. What publications does MOAA provide to surviving spouses?**

A. Click [here](#) for a list of survivor publications. You may also be interested in some [spouse and family publications](#), or [financial publications](#). Resources beyond publications, including advocacy news and monthly updates to MOAA's Surviving Spouse Corner, are available [here](#).

MOAA's Minnesota Chapter has compiled [The Day After Calls](#), an online publication to help families with steps to take when a military member passes.

**MOAA's Surviving Spouses Advisory Council: How do I reach out to MOAA's Surviving Spouse Advisory Council?**

A. Email the council at [sscomm@moaa.org](mailto:sscomm@moaa.org). Meet the members [here](#).

## SURVIVING SPOUSE ADVISORY COUNCIL 2023



Row 1. Gail Joyce, Pat Green, Renee Matthews, Vivianne Wersel  
Row 2. Barbara Smith, Kathy Thorp, Nancy Mullen, Nora Durham  
Row 3. Suzanne Walker (MOAA Staff Advisor)





# MOAA

## NORTH CAROLINA & FEDERAL LEGISLATION

### TAKE ACTION

Here is a look at MOAA's priorities, in support of the 50th anniversary of our all-volunteer force and to address the challenges facing our uniformed community. Note: Our advocacy team remains active on many other issues not listed here; our priorities will be shaped throughout the year depending on concurrent successes or emerging issues that warrant an all-hands approach. Additionally, we share many interests with The Military Coalition and other stakeholder groups, and leverage those relationships to expand our reach on Capitol Hill.

[Compensation and Service-Earned Benefits](#)

[Military Housing](#)

[Health Care for Currently Serving and Retirees](#)

[Health Care and Benefits for Veterans](#)

[Service Families](#)

[Survivors](#)

[Guard and Reserve](#)



U.S. Department of Defense

## 2024 State Policy Priorities Supporting Service Members and Families

North Carolina status as of October 20, 2023

**Military Access to Quality Family Child Care:** In many cases, DOD-certified military family child care providers must also be licensed or registered by the state when simply caring for DOD children. By recognizing military family child care certification, in lieu of requiring state licensing, states can enhance access to military child care and reduce the time on waitlists. States can also support Military Child Care in Your Neighborhood-PLUS, which increases access for active-duty, National Guard and reserve families. **11 states have policy exempting MFCC providers. NC implemented MCCYN-PLUS in 2023 but has no policy to recognize MFCC providers.**

**Military Spouse Employment and Economic Opportunities:** Many military spouse professionals must relicense each time they transfer with their active-duty spouse. As states implement the provision of the Military Spouse Licensing Relief Act, they can help military spouses maintain professional and financial stability by enacting licensing compacts and ensuring that licensing agencies make their application processes accessible to military spouses. **1 state has policy mirroring the federal law and 36 states have policy to help spouses who choose to apply for a state license in the receiving state. NC requires a NC license to practice and has a policy that subjects the applicant to excessive paperwork in order to demonstrate that the license is substantially equivalent to, or exceeds the requirements for NC licensure. Even though NC requires processing of applications within 15 days, the state does not meet the desired outcome for enabling spouses to practice under a state license. Interstate Compact Status: 3 - Advanced Practice Registered Nurse Compact; 29 - Speech-Language Pathology Compact; 2 - Cosmetology Licensure Compact; 2 - Dental/ Dental Hygienist compact; 24 - EMS Licensure Compact; 1 - Interstate Massage Therapy Compact; 10 - Interstate Teacher Mobility Compact; 28 - Licensed Professional Counseling Compact; 40- Nurses Licensure Compact; 28- Occupational Therapy Licensure Compact; 36- Physical Therapy Licensure Compact; 2- Physician Associates Compact; 38- Psychology Interjurisdictional Compact; and 1- Social Work Licensure Compact. NC is a member of 6 compacts and introduced SB 718 in 2023 to join the Social Work Licensure compact.**

**Defining Armed Forces in State Policy:** Recent force structure changes require updates to ensure that states' definitions of military service align with federal law. States can minimize disruptions in benefits and services for eligible service members and dependents by clearly defining "armed forces." **23 states have, or introduced, policy. NC does not provide benefits to members of the Space Force according to policy definitions.**

**Military Community Representation on State Boards and Councils:** By including members of the military community, states can ensure that unique operational requirements and military family priorities are considered across pertinent policy areas. **New Issue for 2024. NC GS § 143B-1311 defines membership on the North Carolina Military Affairs Commission which includes military representation. NC complete.**

**State Support for Military Families with Special Education Needs:** Highly mobile children, including military children, are more likely to experience recurring educational disruptions and challenges, particularly those who need access to special education and related services. States can assist by streamlining processes to ensure timely establishment of comparable special education services upon relocation and reducing burdens associated with due process proceedings. **New Issue for 2024. Pertinent policy has not been identified in NC at this time.**

**Open Enrollment Flexibility:** Military families are at a disadvantage when it comes to school enrollment options due to military-directed assignments. States can provide military families with improved schooling options by modifying open enrollment policies. **15 states passed supporting policy. Pertinent policy has not been identified in NC at this time.**

**Child Abuse Identification and Reporting:** Federal law requires the DOD to request state reports regarding instances of child abuse and neglect involving military family members. States can assist military Family Advocacy Programs in providing needed support by requiring child protective services to report cases to the military at the onset of their investigations **33 states passed supporting policy. GS § 7B-307 requires directors to report to the appropriate military authority when there is evidence of abuse or neglect of a juvenile by a parent, guardian, custodian, or caretaker with**



Defense-State Liaison Office  
Southeast Regional Liaison  
Eric S. Sherman

571-309-7589  
Eric.S.Sherman2.civ@mail.mil  
<https://statepolicy.militaryonesource.mil>

military affiliation. **NC complete.**



U.S. Department of Defense

**Military Family Anti-Discrimination Status:** To supplement employment protections under the Uniformed Services Employment and Reemployment Rights Act, states can add military family status as a class protected in state education, housing, public utilities and civil rights laws. **3 states passed supporting policy. HB 518 and SB 398 were introduced in 2023 which relate to this policy issue.**

**State Response to Military Interpersonal Violence:** While the DOD has led the implementation of enterprise-wide guidance on prevention, states can address harmful behaviors, such as sexual assault and domestic violence, by expanding protections for victims. Enacting state policy best practices can supplement federal program efforts and changes.  
**New Issue for 2024**

**Concurrent Juvenile Jurisdiction:** On military installations subject to exclusive federal jurisdiction, investigation and adjudication of juvenile offenses is limited because cases may only be adjudicated in the federal system. States can adopt concurrent jurisdiction policies to ensure access to state resources and juvenile courts for appropriate adjudication options to better respond to juvenile needs. **5 states passed supporting policy. HB 252 of 2022 established policy to authorize the state to exercise concurrent jurisdiction for offenses committed by juveniles on united states military bases located within the state. NC complete.**

**MILITARY  
STATE POLICY  
SOURCE**

Defense-State Liaison Office  
Southeast Regional Liaison  
Eric S. Sherman

571-309-7589  
Eric.S.Sherman2.civ@mail.mil  
<https://statepolicy.militaryonesource.mil>

Just passing this information on for SA. I have been in communications with Eric Sheridan, who supports and represents the SouthEast Region. Their goal is to let the various states know what other states are prioritizing and insights received in their DC office. Eric passed on where NC sits on their different priorities, which is attached. So for Information.

With respect,

Tricia Vinson  
WNC MOAA State Legislative Chief  
NC MOAA and NCVV State Legislative Team  
[Wing23pav@gmail.com](mailto:Wing23pav@gmail.com)  
757-617-3343

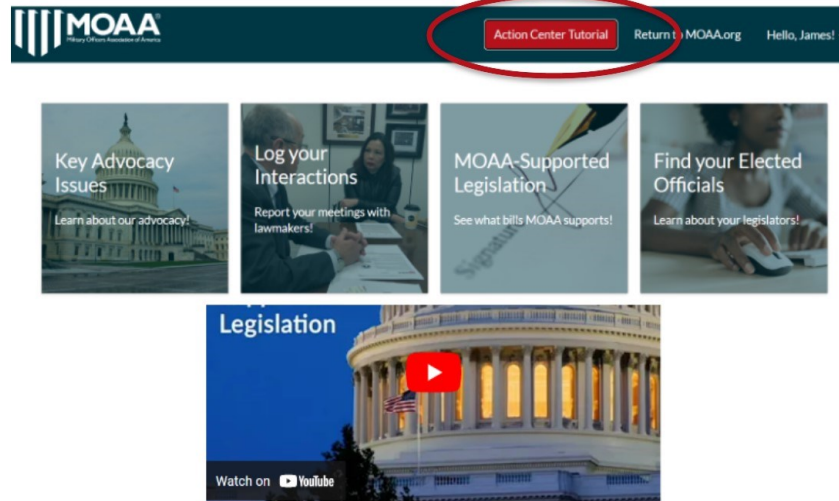
## Supporting State-Level Advocacy: State Legislative Exchange Forum

- Led by MOAA State Legislation Experts  
Don Wolfinger (MO), Harold Cooney (PA), Shelly Kalkowski (CO)
- 140 members from 50 states
- Quarterly meetings since 2019
- Regularly attended by MOAA Gov't Relations and Engagement Staff
- Cloud bank: Presentations, Best Practices, and Documents
- Participate in (and, in some cases, help form) State Military/Veteran Coalitions
- Attend and help facilitate regional volunteer leader workshops  
– legislative advocacy breakout sessions



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# Supporting State-Level Advocacy: Legislative Action Center



**Q. Why do I have to re-enter my information?**

**A.** The changeover to the new system will require all users will require all users to enter in their details, but they will be able to create an account with those details the first time they visit the site. First-time users can sign in [at this link](#); you'll need to provide your information again if you sign in from another browser or device.



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## Supporting State-Level Advocacy: Potential Improvements

- Continue to promote LAC and registration
- Grow State Legislative Exchange Forum
  - Incentivize/Promote/Require participation
  - Identify key “billets” and/or people
  - Presence in every Congressional district
- Explore additional state-level legislative resource
- Levels of Excellence changes
- State Advocacy-Focused Virtual Chapters?





## MOAA NEWS & INFORMATION

# Information Sharing

- Committee Module Enhancements
  - More Requested Data Fields
  - Near Real Time (NRT) Date Range Increase
  - Chapter Roster and NRT Match
- Expanded Member Data Sharing
  - Opt-in Joins Prior to October 2018
  - Upon Council Request for Non-Commercial use
  - Restrictions and Safeguards



8

## REFERENCE INFORMATION SECTION

### **MOAA HAS FIVE VIRTUAL CHAPTERS**

They are: Uniformed Services Nurse Advocates Virtual Chapter, the Surviving Spouse Virtual Chapter, the Public Health Service Virtual Chapter, Chaplains Virtual Chapter and the Judge Advocate Virtual Chapter . Inquiries can be sent via email to [Moajavc@gmail.com](mailto:Moajavc@gmail.com).

Interested in participating in one of these virtual chapters, or in championing another group? Contact Capt. Pat L. Williams, USN (Ret), MOAA's Program Director for Engagement, at [patw@moaa.org](mailto:patw@moaa.org), or Capt. Erin Stone, JAGC, USN (Ret), Senior Director for Council and Chapter Affairs, at [erins@moaa.org](mailto:erins@moaa.org), for more information.

Join the Facebook page “ DIC Surviving Spouses/DIC Increase Advocacy “ today and get involved! For more information contact MOAA surviving spouse Edith Smith, phone (703) 569-3380 or email [esmith@capitolcrusader.com](mailto:esmith@capitolcrusader.com)

### **Learn What Your Fellow Veterans Know**

Mental Health Issues affect Veterans throughout the year, Veterans and those who care about them are encouraged to visit [MakeTheConnection.net](http://MakeTheConnection.net) to learn more about mental health and healing from Veterans who know because they've been there.

### **Veterans Eligible for Travel and Hotel Discounts**

[AmericanForcesTravel.com](http://AmericanForcesTravel.com) is a Department of Defense online leisure travel website managed by Morale, Welfare, and Recreation and supported by Priceline. Veterans can access exclusive deals on hotels, flights, rental cars, cruises, packages and event tickets

### **COMMUNITY OUTREACH SPONSORSHIP**

Apply for up to \$300 per chapter or \$800 per council to support community service programs and recruiting/branding events. Get details [at this link](#).



# VERETERANS ADMINISTRATION (VA)

## PACT Act Related Effective Date Scenarios

### Compensation Claims

**Scenario 1: Original Compensation claim was filed for a PACT Act presumptive condition within 1 year of the date the PACT Act was signed into law**

**What Actions Need To Be Taken:** Submit a VA Form 21-526EZ claiming the PACT Act presumptive condition. On the VA Form 21-526EZ in Section IV: Claim Information, the box states: “If due to exposure, Event, or Injury, Please Specify”, for this you will write **Toxic Exposure**. Additionally in Section IV it states: “Explain how the disability(ies) relates to the in-service event/exposure/injury, here you will write **Service in (xxxx)**.”

**Effective Date:** The effective date will be August 10, 2022 – the date the PACT Act was signed

**Scenario 2: Original Compensation claim for a newly added Pact Act Presumptive condition was filed after 1 year of the law change**

**What Actions Need To Be Taken:** Same actions as Scenario 1

**Effective Date:** The effective date will be the date the claim was submitted.

**Scenario 3: Intent to File was submitted within 1 year of the PACT Act being signed into law and a compensation claim for a newly added PACT Act Presumptive condition is filed within 1 year of the ITF.**

**What Actions Need To Be Taken:** Same actions as Scenario 1

**Effective Date:** The effective date will be August 10, 2022. This is due to the ITF preserving the date of law change as the effective date and the claim was submitted within the ITF window.

**Scenario 4: Veteran was denied benefits for a PACT Act presumptive condition prior to the PACT Act being signed into law.**

**What Actions Need To Be Taken:** Submit VA Form 20-0995 with a VA Form 21-4138 stating:

*(Veteran’s Name) has previously filed a claim for (condition) and this claim was denied on (date) due to (reason for denial). (Veteran’s name) served in (location) from (dates of service in that location) and is now eligible for pre-sumptive service connection under the PACT Act of 2022. Please accept this statement in conjunction with the law change as new and relevant evidence and review the veteran’s claim for (condition). Your attention to this matter is greatly appreciated.*

VA Form 20-0995 in Part II box 13A states to list the specific issues on appeal. Here you will write the condition and “Please see attached 21-4138 to satisfy requirement for new and relevant evidence.”

**Effective Date:** The effective date will be August 10, 2022 or 1 year prior to the filing of the claim, whichever is later. The effective date cannot be earlier than August 10, 2022.

**Scenario 5: Dependency Indemnity Compensation (DIC) claim was filed and denied BEFORE the PACT Act was signed.**



# PACT Act Related Effective Date Scenarios

## Survivor Benefits Claims

### Scenario 6: Dependency Indemnity Compensation (DIC) claim filed *AFTER* PACT Act was signed.

**What Actions Need To Be Taken:** Submit A VA Form 21P-534EZ claiming DIC benefits, along with the death certificate showing the veteran passed away from a PACT Act Presumptive condition.

**Effective Date is:** The effective date will be August 10, 2022 or 1 year prior to the filing of the claim, whichever is later. The effective date cannot be earlier than August 10, 2022.

### Scenario 7: Intent to File was submitted within 1 year of the PACT Act being signed into law and a DIC claim for a newly added PACT Act Presumptive condition is filed within 1 year of the ITF.

**What Actions Need To Be Taken:** Same actions as Scenario 6

**Effective Date:** The effective date will be August 10, 2022. This is due to the ITF preserving the date of law change as the effective date and the claim was submitted within the ITF window.

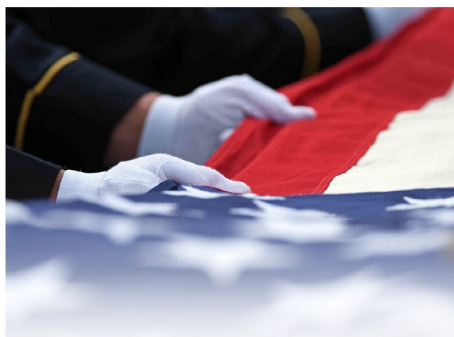
**When filing for an appeal of a previously denied PACT Act Presumptive, follow this example of a 20-0995 already filled in.**

**When filing for a PACT Act Presumptive, follow this example of a 21-526EZ requesting service connection for Melanoma due to Toxic Exposure**

PART II - ISSUE(S) FOR SUPPLEMENTAL CLAIM	
13. YOU MUST LIST EACH ISSUE DECIDED BY VA THAT YOU WOULD LIKE VA TO REVIEW AS PART OF YOUR SUPPLEMENTAL CLAIM. Please refer to your decision notice(s) for a list of adjudicated issues. For each issue, please identify the date of VA's decision. (You may attach additional sheets of paper, if necessary. Include your name and file number on each additional sheet.)	
Check this box if any issue listed below is being withdrawn from the legacy appeals process. <input type="checkbox"/> OPT-IN from SOC/SSOC	
13A. SPECIFIC ISSUE(S)	13B. DATE OF VA DECISION NOTICE
Melanoma- Please see attached 21-4138 to satisfy requirement for new and Relevant Evidence.	DATE <input type="text"/>

**When filing for a PACT Act Presumptive, follow this example of a 21-526EZ requesting service connection**

SECTION IV: CLAIM INFORMATION			
16. LIST THE CURRENT DISABILITY(IES) OR SYMPTOMS THAT YOU CLAIM ARE RELATED TO YOUR MILITARY SERVICE AND/OR SERVICE-CONNECTED DISABILITY (If applicable, identify whether a disability is due to a service-connected disability; confinement as a prisoner of war; exposure to Agent Orange, asbestos, mustard gas, ionizing radiation, or Gulf War environmental hazards; or a disability for which compensation is payable under 38 U.S.C. 1151)			
NOTE: List your claimed conditions below. See the following three examples for guidance on how to complete Section IV.			
EXAMPLES OF DISABILITY(IES)	EXAMPLES OF EXPOSURE TYPE	EXAMPLES OF HOW THE DISABILITY(IES) RELATE TO SERVICE	EXAMPLES OF DATES
Example 1. HEARING LOSS	NOISE	HEAVY EQUIPMENT OPERATOR IN SERVICE	JULY 1968
Example 2. DIABETES	AGENT ORANGE	SERVICE IN VIETNAM WAR	DECEMBER 1972
Example 3. LEFT KNEE, SECONDARY TO RIGHT KNEE		INJURED LEFT KNEE WHEN BRACE ON RIGHT KNEE FAILED	6/11/2008
CURRENT DISABILITY(IES)	IF DUE TO EXPOSURE, EVENT, OR INJURY, PLEASE SPECIFY (e.g., Agent Orange, radiation)	EXPLAIN HOW THE DISABILITY(IES) RELATES TO THE IN-SERVICE EVENT/EXPOSURE/INJURY	APPROXIMATE DATE DISABILITY(IES) BEGAN OR WORSENERD
1. Melanoma	Toxic Exposure	Service in ( List where deployed)	Date



## Benefits to Support Survivors

- **DEATH GRATUITY** - A one-time, nontaxable payment to help surviving family members deal with the financial hardships that accompany the loss of a service member.
- **SSSB** - Social Security Survivor Benefits are monthly benefits paid to eligible family members of a deceased service member who has worked and paid Social Security taxes.
- **SSIA** - Special Survivor Indemnity Allowance is a benefit for surviving spouses who receive a Survivor Benefit Plan annuity that is offset by a Dependency and Indemnity Compensation payment from the U.S. Department of Veterans Affairs.
- **SGLI** - Servicemembers' Group Life Insurance is life insurance coverage for a service member.
- **TSGLI** - Servicemembers' Group Life Insurance Traumatic Injury Protection is financial assistance for service members who incur physical losses due to traumatic injuries.
- **FSGLI** - Family Servicemembers' Group Life Insurance is life insurance coverage for a service member's spouse and dependent children.
- **DIC** - Dependency and Indemnity Compensation is a tax-free monthly payment to survivors provided by the Department of Veterans Affairs.
- **SBP** - The Survivor Benefit Program is a taxable annuity for survivors paid through the Defense Finance and Accounting Service.
- **TRICARE** - The uniformed services' health care program.
- **DEA** - Dependents Educational Assistance is an educational benefit provided by the Department of Veterans Affairs.

This milestone guide outlines the change in benefits survivors can expect and what decisions a survivor may need to make.

## Primary and Secondary Next of Kin (Includes Spouses)

### Within 14 Days

- Meet your casualty assistance officer.
  - Verify family information.
  - Choose whether to authorize the disclosure of information to other government organizations for benefits and support.
- Review the will and any estate planning documents.
- Plan a funeral if you're the person authorized to direct disposition.
- Track and submit reimbursement claims for the funeral and related travel.
- Obtain a new dependent ID card (if applicable). ([www.dmdc.osd.mil/self\\_service](http://www.dmdc.osd.mil/self_service))

### Within First Year

- Update vehicle title and registration.
- Settle bank accounts, loans and credit cards.
- Connect with your service's long-term care management program.
- Request a copy of appropriate investigative reports.
- Inventory personal effects and submit claims for missing or damaged items if you're a person entitled to receive effects.
- Receive free financial counseling and online will preparation from FinancialPoint Plus if you are an SGLI recipient ([www.financialpointplus.com](http://www.financialpointplus.com)).

## Spouses

### Within First Year

- Update your status in the DEERS (Defense Eligibility Enrollment Reporting System) registry.
- Apply for Veterans Affairs DIC (Dependency and Indemnity Compensation), SBP (Survivor Benefit Plan), and Social Security (if applicable).
- Review initial Survivor Benefits Report with casualty assistance officer.

## For additional resources, visit:

- Long-term care at <https://go.usa.gov/xAZtY>
- Days Ahead Binder at <https://go.usa.gov/xAZt2>
- Survivors Guide to Benefits at <https://go.usa.gov/xAZtT>



Call or chat anytime, from anywhere in the world to learn more and connect to support. We're here for you 24/7.

800-342-9647 | [MilitaryOneSource.mil](http://MilitaryOneSource.mil)

To learn more, go to [MilitaryOneSource.mil](http://MilitaryOneSource.mil) and search "Survivor Support."



- Create a DS Logon Level 2 (Premium) account (<https://go.usa.gov/xAZtW>).
- Create a VA eBenefits account ([www.ebenefits.va.gov/ebenefits/apply](http://www.ebenefits.va.gov/ebenefits/apply)).
- Access your Interactive Online Survivor Benefits Report (<https://go.usa.gov/xAZtK>).
- Access free financial counseling from Military OneSource.
- File income taxes with free software and support from MiTax ([www.militaryonesource.mil/miltax](http://www.militaryonesource.mil/miltax)).

### One Year

- HEART (Heroes Earning Assistance and Relief Tax) Act eligibility for applicable survivors expires.
- "Final Move" deadline for survivors in government housing.

### Three Years

- "Final Move" deadline for survivors not in government housing. You may request an extension.
- "Qualifying widow/widower" federal income tax status expires.
- TRICARE Prime and active-duty dental plan expire. You're automatically enrolled in TRICARE Select for retirees. You may choose to enroll in TRICARE Prime for retirees and TRICARE Dental Program Survivor Benefit Plan.

### 20 Years

- Spouse Dependents' Educational Assistance eligibility ends.

### Age 55

- Remarriage restrictions on SBP payments lifted.
- Remarriage restrictions on DIC payments lifted.

### Age 57

- Remarriage restrictions on Social Security survivor benefits lifted.
- Reduced-rate Social Security retirement benefits available.

## Children

### Within First Year

- Obtain ID card (any age).
- Eligible for 40 hours of respite care at military Child Development Center.

### Age 16

- Social Security survivor benefits for child(ren)'s parental or nonparental caregiver ends.



# Today And Tomorrow

Department of Defense milestone guide for survivors of service members who died in an active-duty status



### Age 21

- TRICARE and TRICARE Dental Program Survivor Benefit eligibility ends. Full-time college students remain eligible through age 23, if they meet certain conditions. They may also qualify to buy TRICARE Young Adult (age 21-26). (<https://www.tricare.mil/TYA>)

### Age 23

- TRICARE and TRICARE Dental Program Survivor Benefit Plan eligibility ends for students; TRICARE Young Adult can be purchased.

### Age 26

- DEA eligibility ends.

### Age 33

- Fry Scholarship eligibility ends if eligibility began before Jan 1, 2013. Time limit lifted if eligibility began after that date.

## Financial Beneficiary

### Within First Year

- Free financial counseling and online will preparation are available from Financial Point Plus for SGLI recipients ([www.financialpointplus.com](http://www.financialpointplus.com)).
- If applicable: Nonparent guardian of Surviving child(ren) should establish legal guardianship.

### One Year

- HEART (Heroes Earning Assistance and Relief Tax) Act eligibility expires (applicable to SGLI and Death Gratuity recipients).

