

## Chapter 8

# Conducting the Veteran Interview

### Overview

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**Introduction** This chapter contains information about conducting the interview, including:

- conducting interviews, and
  - following up after an interview.
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**In this Chapter** This chapter includes the following sections:

Section	Section Name	See Page
A	Conducting Veteran Interviews	8-A-1
B	Following Up after a Veteran Interview	8-B-1

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## Section A

### Conducting Veteran Interviews

#### Overview

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**Introduction** This section contains information about conducting interviews, including:

- freedom of choice
  - assessing the veteran's abilities
  - reviewing the Grant Program and benefits
  - explaining design and construction/remodeling considerations for both
    - Paraplegic Housing (PH) cases, and
    - Adaptive Housing (AH) cases
  - discussing personal finances for both
    - PH cases
    - AH cases, and
  - discussing escrow and release of funds.
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**In this Section** This section includes the following topics:

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## General Information About Conducting Veteran Interviews

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**Introduction** This topic contains information about conducting interviews, including:

- a description
  - important information
  - when to perform
  - methods for conducting the interview
    - interview questions
    - assessments
    - discussions, and
  - representatives.
- 

**Description** The *interview* is a meeting with the veteran that:

- establishes the relationship
  - allows an assessment of the veteran's
    - exterior surroundings
    - living conditions
    - interactions between family members
    - overall condition
    - physical size
    - ability and willingness to make decisions
    - ability to maneuver in his/her wheelchair, and
  - provides an opportunity to discuss the benefits of the program, while answering any questions and concerns the veteran may have.
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**IMPORTANT** Document *all* information gained during the interview in the veteran's grant file and in SAH/The Appraisal System (TAS).

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## General Information About Conducting Veteran Interviews, Continued

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**When to Perform**

The interview is performed on all Specially Adapted Housing (SAH) and Special Housing Adaptations (SHA) Grants within 30 workdays of sending the veteran the grant eligibility letter that explained his/her basic eligibility for the program.

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**Methods for Conducting the Interview**

The three general methods the SAH agents uses to conduct the interview are:

- asking questions
  - performing assessments, and
  - having discussions.
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**Interview Questions**

Questions should be open-ended to solicit more detailed responses from veterans as opposed to questions that require a simple “yes” or “no” response.

**Example:** What daily activities do you need assistance in performing?

**Not:** Do you need assistance in performing daily activities?

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## General Information About Conducting Veteran Interviews, Continued

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### Assessments

Assessments are based on observations of the veteran's:

- physical abilities
- behavior and interactions, and
- ability to manage personal finances.

Thorough an assessment of the veteran's abilities, help to:

- identify the adaptations that are needed in the home for the veteran's particular condition
- determine whether he/she is capable of
  - comprehending the information about the grant programs, and
  - performing the grant requirements.

**Note:** If the veteran is unable to comprehend information or perform the grant requirements, the veteran must acquire a representative.

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### Discussions

Discussions with the veteran are performed to make sure the veteran fully understands the:

- grant program
  - his/her responsibilities
  - his/her specific needs in regards to design and construction considerations, and
  - financial considerations.
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## General Information About Conducting Veteran Interviews, Continued

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**Representatives** Representatives are required when the veteran is unable to comprehend information or perform the grant requirements, such as signing documentation or making decisions. Representatives can be:

- fiduciaries
- power of attorney
- custodians
- guardians
- family members
- friends
- neighbors, or
- any other appointed individual.

***IMPORTANT:***

- Appropriate legal documentation is *required* in order for the representative to sign documentation or act on behalf of the veteran.
  - The representative should *always* be present when discussing the grant with the veteran.
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## Freedom of Choice

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### Introduction

This topic contains information about freedom of choice, including:

- policy
  - financing and banking
  - site selection
  - locality
  - contractor selection
  - draftsmen/architect
  - attorney, and
  - escrow agent.
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### Policy

When discussing remodeling or construction with the veteran, it is important to emphasize that the veteran can exercise freedom of choice regarding the following areas:

- mortgage and construction financing
  - site selection
  - locality
  - contractor selection
  - draftsman/architect
  - attorney, and
  - escrow agent.
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### Financing and Banking

The veteran is free to select the bank or financial institution of their choice to obtain loans for mortgage and construction financing.

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### Site Selection

If the veteran chooses to construct a new home, the veteran is free to choose the site on which to build.

**IMPORTANT:** The proposed building site must be inspected by the Department of Veteran Affairs (VA) for suitability/feasibility for adaptive use and construction prior to grant approval.

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## Freedom of Choice, Continued

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**Locality** The veteran can choose to live in any locality, city, or State within the United States to utilize the grant. An SAH agent representing the State in which the home will reside will be the main point of contact. This includes instances where the veteran chooses to construct a home in a State other than where he/she currently lives.

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**Contractor Selection**

The veteran is free to choose:

- any three contractors to obtain bids, and
- the final contractor used for the project.

**Reminder:** The three bids are to protect the veteran's interests and provide some means of comparison to determine fair and reasonable costs when choosing how to use grant funds.

**Reference:** For more information about three bid requirement and contractors, see Chapter 9, Section D, "Interviews with the Architect and/or Contractor," Chapter 9, Section H, "Bid (Proposal) Reviews and Contract Acceptance for Specially Adapted Housing (SAH) Cases," and Chapter 10, Section D, "Special Housing Adaptations (SHA) Bids/Proposals/Contracts."

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**Draftsman/ Architect**

The veteran is free to choose a draftsman or architect if one is used for the project.

**Note:** VA may assist the veteran in acquiring plans and specifications.

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**Attorney**

The veteran is free to choose the attorney used for the grant.

**Note:** An attorney may be needed to provide a title examination for the structure/property.

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**Escrow Agent**

The veteran is free to choose the escrow agent used for the grant.

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## Assessing the Veteran's Abilities

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**Introduction** This topic contains information about assessing the veteran's abilities.

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**Purpose** An assessment of the veteran's abilities is performed to determine if the veteran is capable of:

- comprehending the information, and
  - performing the grant requirements.
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**How to Assess the Veteran's Abilities** Follow the steps in the table below to assess the veteran's abilities.

**Reference:** For more information about medical feasibility, see Chapter 15, Section F, "Medical Feasibility Cases."

Step	Action
1	Does the veteran reside in a nursing home or other facility? <ul style="list-style-type: none"> <li>• If <i>yes</i>, go to Step 2.</li> <li>• If <i>no</i>, go to Step 5.</li> </ul>
2	Has the veteran's physician provided a medical release ( <i>VA Form 10-4555b, Certificate of Medical Feasibility Statement</i> ) stating that the veteran can reside in the adapted home? <ul style="list-style-type: none"> <li>• If <i>yes</i>, go to Step 4.</li> <li>• If <i>no</i>, go to Step 3.</li> </ul>
3	Send a request to veteran's physician to complete <i>VA Form 10-4555b</i> to the veteran's physician, and provide a completed copy to the Veterans Service Center (VSC).
4	After reviewing the medical release or <i>VA Form 10-4555b</i> , does the veteran have the mental and physical abilities to reside in the home? <ul style="list-style-type: none"> <li>• If <i>yes</i>, go to Step 5.</li> <li>• If <i>no</i>, go to Chapter 15, Section F, "Medical Feasibility Cases."</li> </ul>

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## Assessing the Veteran's Abilities, Continued

### How to Assess the Veteran's Abilities (continued)

Step	Action
5	<p>Determine how the veteran manages daily tasks, such as bathing, dressing, getting in and out of bed, and feeding himself/herself by asking the veteran to:</p> <ul style="list-style-type: none"> <li>• describe how he/she completes these activities</li> <li>• demonstrate how he/she performs tasks, and</li> <li>• describe any business, hobbies or activities that he/she engages in.</li> </ul>
6	<p>Discuss how:</p> <ul style="list-style-type: none"> <li>• the veteran interacts with others in the home, including the               <ul style="list-style-type: none"> <li>- spouse, and</li> <li>- children</li> </ul> </li> <li>• common rooms are currently used, and</li> <li>• modifications to the existing structure or a new structure can be changed to meet the needs of the entire family.</li> </ul>
7	<p>Determine whether the veteran requires the assistance of a guardian or caregiver, such as a:</p> <ul style="list-style-type: none"> <li>• family member</li> <li>• nurse, or</li> <li>• neighbor.</li> </ul> <p><b>Note:</b> Design rooms, such as bathrooms and kitchens, with plenty of space for someone to assist the veteran.</p> <p><b>Example:</b> If the caregiver assists the veteran in the bathtub or shower, ensure that the design of the bathtub or shower will provide the caregiver the ability to assist the veteran while he/she is using it.</p>

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## Assessing the Veteran's Abilities, Continued

### How to Assess the Veteran's Abilities (continued)

Step	Action
8	<p>Is the veteran going to remodel an existing house?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, assess the house to determine if it is feasible for the type of remodeling needed to help the veteran.</li> <li>• If <i>no</i>, solicit additional information from the veteran regarding the design features of different rooms that are going to be built in the house to make sure each room meets the veteran's daily needs.</li> </ul>
9	<p>Gain an understanding of the veteran's ability to handle his/her finances by asking the veteran about:</p> <ul style="list-style-type: none"> <li>• other financial obligations, and</li> <li>• his/her credit history.</li> </ul>
10	<p>Is the veteran capable of comprehending the information?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, the assessment is complete.</li> <li>• If <i>no</i>, go to Step 11.</li> </ul>
11	<p>Does the veteran have a representative?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, go to Step 12.</li> <li>• If <i>no</i>, advise the veteran that he/she needs to obtain a representative before the interview can proceed.</li> </ul> <p><b>Reference:</b> For more information about representatives, see "General Information About Conducting Veteran Interviews" earlier in this section.</p>
12	<p>Is the representative present for the interview?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, proceed with the interview.</li> <li>• If <i>no</i>, inform the veteran that he/she must have the representative present before the interview can proceed.</li> </ul> <p><b>Note:</b> Make sure the grant file contains the appropriate legal documentation for the representative.</p>

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## Assessing the Veteran's Abilities, Continued

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### Sample Scenario #1

**Situation:** Joe, a veteran who suffered from a head injury while in the service that left him physically and mentally disabled, currently resides in a rehabilitation center. He requires constant care (usually by more than one person), is large in size, has aggressive behavior, and has harmed himself and others. He needs someone who is physically capable of assisting and caring for his needs. His mother is 75 years old and cannot physically take care of him.

**Assessment:** Due to the situation and Joe's circumstances, it would not be considered medically feasible for Joe to reside in his home.

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### Sample Scenario #2

**Situation:** Daniel, a veteran who suffered a stroke that left him paralyzed on his left side, is currently in a nursing home and only comes home two weekends a month. He requires total care and his spouse is not able to do it alone. Daniel and his wife have four children who help out on the weekends. His wife works 28 hours per week. Daniel cannot live alone and must have total care. As a result, the family has signed a permanent contract with the nursing facility for his care.

**Assessment:** Due to the situation and Daniel's circumstances, it is not medically feasible for Daniel to reside in his home.

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### Sample Scenario #3

**Situation:** Bob, a veteran who has lost the use of both legs but has little difficulty with upper body mobility, lives with his wife and two teenaged sons. Bob is able to perform most activities necessary for his care and well being, but lives in a home that has no adaptive features. Lack of adaptive features in the bathroom, kitchen, and other areas of his home limit Bob's abilities and require unnecessary assistance from his wife and sons.

**Assessment:** With appropriate specially-adaptive modifications designed and constructed to Bob's home, it would be feasible for Bob to reside in his home.

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## Discussing the Grant Program and Benefits

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**Introduction** This topic contains information about discussing the Grant Programs and benefits, including:

- the purpose, and
  - how to discuss the grant program and benefits.
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**Purpose** An overview of the Grant Program and other benefits is provided during the interview to make sure the veteran fully understands the:

- purpose of the grant
  - maximum amount of the grant
  - plan types, and
  - other benefits provided by the Department of Veterans Affairs (VA).
- 

**How to Discuss the Grant Program and Benefits**

Follow the steps in the table below to discuss the Grant Program and benefits with the veteran.

Step	Action
1	Provide the veteran with a description and history of the Grant Program.
2	<p>Inform the veteran of the Grant Program, including</p> <ul style="list-style-type: none"> <li>• eligibility requirements</li> <li>• availability</li> <li>• the maximum grant amount</li> <li>• limitations</li> <li>• the conditions for approval, and</li> <li>• freedom of choice opportunities.</li> </ul> <p><b>Reference:</b> For more information about the Grant Program, see Chapter 1, “Specially Adapted Housing (SAH) and Special Housing Adaptations (SHA) Grant Programs.”</p>

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## Discussing the Grant Program and Benefits, Continued

### How to Discuss the Grant Program and Benefits (continued)

Step	Action
3	Provide the veteran <i>VA Pamphlet 26-69-1, Questions and Answers on Specially Adapted Housing</i> .
4	<p>Discuss the different plan types with the veteran.</p> <p><b>Reference:</b> For more information about plan types, see Chapter 6, “Specially Adapted Housing (SAH) and Special Housing Adaptations (SHA) Plan Types and Grant Calculations.”</p>
5	<ul style="list-style-type: none"> <li>• Provide the veteran with:               <ul style="list-style-type: none"> <li>- <i>VA Pamphlet 29-79-2, Veterans Mortgage Life Insurance Facts and Premium Rates</i>, and</li> <li>- <i>VA Form 29-8636, Veterans Mortgage Life Insurance Statement</i>.</li> </ul> </li> <li>• Discuss Veterans Mortgage Life Insurance (VMLI) with the veteran.</li> </ul> <p><b>Reference:</b> For more information about VMLI, see Chapter 5, Section A, “Veterans Mortgage Life Insurance (VMLI).”</p>
6	<p>Review the Home Improvement and Structural Alterations (HISA) Grant with the veteran.</p> <p><b>Reference:</b> For more information about HISA, see Chapter 5, Section C, “Home Improvement and Structural Alterations (HISA).”</p>

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## Discussing the Grant Program and Benefits, Continued

### How to Discuss the Grant Program and Benefits (continued)

Step	Action
7	<p>Discuss the following services with the veteran:</p> <ul style="list-style-type: none"> <li>• Prosthetics and Sensory Aids Services (P&amp;SA)</li> <li>• Vocational Rehabilitation and Employment Services (VR&amp;E), and</li> <li>• Veterans Service Center (VSC).</li> </ul> <p><b>References:</b></p> <ul style="list-style-type: none"> <li>• For more information about P&amp;SA, see Chapter 5, Section B, “Prosthetics and Sensory Aids Services (P&amp;SA).”</li> <li>• For more information about VR&amp;E, see Chapter 5, Section D, “Vocational Rehabilitation and Employment Services (VR&amp;E).”</li> <li>• For more information about the VSC, see Chapter 5, Section F, “Veterans Service Center (VSC).”</li> </ul>
8	<ul style="list-style-type: none"> <li>• Provide the veteran with: <ul style="list-style-type: none"> <li>- <i>VA Pamphlet 80-07-1, Federal Benefits for Veterans and Dependents</i></li> <li>- <i>VA Pamphlet 26-4, VA-Guaranteed Home Loans for Veterans</i>, and</li> <li>- <i>VA Pamphlet 26-6, To the Home-Buying Veteran.</i></li> </ul> </li> <li>• Discuss the other benefits offered to the veteran by VA.</li> </ul>
9	<p>Provide the veteran with a checklist of:</p> <ul style="list-style-type: none"> <li>• forms to complete</li> <li>• things to read, and</li> <li>• what steps to follow.</li> </ul> <p><b>Example:</b> <i>VA Form 119, Report of Contact</i>, is an example of a checklist for the above items.</p>

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## Discussing the Grant Program and Benefits, Continued

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How to Discuss the Grant Program and Benefits (**continued**)

<b>Step</b>	<b>Action</b>
10	Provide the necessary VA forms, and review the forms carefully with the veteran.  <b>Reference:</b> For more information about the forms related to the Grant Programs, see the Manual Introduction, “Department of Veterans Affairs (VA) Forms, Pamphlets and Other Materials.”

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## Discussing Design and Construction/Remodeling Considerations for Paralegic Housing (PH) Cases

**Introduction** This topic contains information about discussing design and construction/remodeling considerations for Paralegic Housing (PH) cases, including the:

- purpose, and
- topics for discussion.

**Purpose** The design and construction/remodeling considerations for the PH cases are discussed to make sure the veteran:

- comprehends the information, and
- is capable of handling the requirements.

**Topics for Discussion** Thoroughly discuss the items in the table below with the veteran.

<b>Topic</b>	<b>Reference</b>
Minimum Property Requirements (MPRs)	See Chapter 7, Section A, “Specially Adapted Housing (SAH) Minimum Property Requirements (MPRs).”
Site inspections	See Chapter 9, Section B, “Specially Adapted Housing (SAH) Vacant Land Inspections.”
Home inspections	See Chapter 9, Section C, “Specially Adapted Housing (SAH) Existing Home Inspections.”
Cost considerations	See Chapter 9, Section E, “The Cost Analysis.”
Construction bids and lien and performance bonds	See Chapter 9, Section H, “Bid (Proposal) Reviews and Contract Acceptance for Specially Adapted Housing (SAH) Cases.”
Construction plans	See Chapter 9, Section F, “Specially Adapted Housing (SAH) Construction Plans and Assignment of a Department of Veterans Affairs (VA) Compliance Inspector.”

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## Discussing Design and Construction/Remodeling Considerations for Paraplegic Housing (PH) Cases, Continued

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### Topics for Discussion (continued)

<b>Topic</b>	<b>Reference</b>
Department of Veterans Affairs (VA) compliance inspections	See Chapter 9, Section G, "The Inspection Schedule and Assignment of a Department of Veterans Affairs (VA) Compliance Inspector."
Medical and non-medical waivers	See Chapter 11, Section B, "Processing Medical and Non-Medical Waiver Requests."

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## Discussing Design and Construction/Remodeling Considerations for Adaptive Housing (AH) Cases

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**Introduction** This topic contains information about discussing design and construction/remodeling considerations for Adaptive Housing (AH) cases, including the:

- purpose, and
  - topics for discussion.
- 

**Purpose** The design and construction/remodeling considerations for the AH cases are discussed to make sure the veteran:

- comprehends the information, and
  - is capable of handling the requirements.
- 

**Topics for Discussion** Thoroughly discuss the items in the table below with the veteran.

<b>Topic</b>	<b>Reference</b>
Allowable adaptations	See Chapter 10, Section A, “Allowable Adaptations for Special Housing Adaptations (SHA) Cases.”
Home inspections	See Chapter 10, Section B, “Special Housing Adaptations (SHA) Existing Home Inspections.”
Construction bids	See Chapter 10, Section D, “Special Housing Adaptations (SHA) Bids/Proposals/Contracts.”
Construction plans	See Chapter 10, Section E, “Special Housing Adaptations (SHA) Construction Plans.”
Department of Veterans Affairs (VA) Compliance Inspections	See Chapter 10, Section F, “Special Housing Adaptations (SHA) Inspection Schedules.”

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## Discussing Personal Finances for Paralegic Housing (PH) Cases

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**Introduction** This topic contains information about discussing personal finances for Paralegic Housing (PH) cases with the veteran, including:

- the purpose
  - important information, and
  - the topics of discussion.
- 

**Purpose** The personal finances for PH cases are discussed to make sure the veteran:

- comprehends the information, and
  - is capable of handling the requirements.
- 

**Important Information** Be sure to inform the veteran that:

- once all of the financial information is received from the veteran, a determination regarding income and credit is made;
- if the veteran *cannot* financially afford the home or does *not* have means to support any difference between the amount of the new construction/remodeling costs and the grant, the transaction *cannot* take place; and
- if there is an issue of poor credit, the grant must be declined until the poor credit is resolved and good credit is re-established.

**Note:** The Specially Adapted Housing (SAH) agent must notify the veteran of the credit issues and what actions must be taken to resolve any discrepancies.

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## Discussing Personal Finances for Paraplegic Housing (PH) Cases, Continued

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**Topics for  
Discussion**

Thoroughly discuss the items in the table below with the veteran.

<b>Topic</b>	<b>Reference</b>
Required financial documents	See Chapter 11, Section A, "Obtaining Financial Information."
Evidence of title	See Chapter 11, Section C, "Verifying Evidence of Acceptable Title."
Taxation/State grant information	See Chapter 11, Section E, "Handling Grant Approvals."

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## Discussing Personal Finances for Adaptive Housing (AH) Cases

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**Introduction** This topic contains information about discussing personal finances for Adaptive Housing (AH) cases with the veteran, including:

- the purpose
  - important information, and
  - the topics for discussion.
- 

**Purpose** The personal finances for AH cases are discussed to make sure the veteran:

- comprehends the information, and
  - is capable of handling the requirements.
- 

**Important Information** Be sure to inform the veteran that:

- once all of the financial information is received from the veteran, a determination regarding income and credit is made;
- if the veteran *cannot* financially afford the home or does *not* have means to support any difference between the amount of the new construction/remodeling costs and the grant, the transaction *cannot* take place; and
- if there is an issue of poor credit, the grant can be declined until the poor credit is resolved and good credit is re-established.

**Note:** The Specially Adapted Housing (SAH) agent must notify the veteran of the credit issues and what actions must be taken to resolve any discrepancies.

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**Topics for Discussion** Thoroughly discuss the items in the table below with the veteran.

Topic	Reference
Required financial documents	See Chapter 12, Section A, "Verifying the Availability of Funds."
Taxation/State grant information	See Chapter 12, Section C, "Handling Grant Approvals."

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## Discussing Escrow and Release of Funds

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**Introduction** This topic contains information about discussing escrow and the release of funds, including:

- purpose, and
  - topics for discussion.
- 

**Purpose** The escrow and release of funds are discussed to make sure the veteran:

- comprehends the information, and
  - is capable of handling the requirements.
- 

**Topics for Discussion** Thoroughly discuss the items in the table below with the veteran.

<b>Topic</b>	<b>Reference</b>
Escrows	See Chapter 13, Section A, “General Information About Escrows.”
Escrow Agents	See Chapter 13, Section B, “Selection of the Escrow Agent.”
Release of funds	See Chapter 13, Section E, “Management and Authorization to Release Funds.”

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## **Section B**

### **Following Up After a Veteran Interview**

#### **Overview**

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**Introduction** This section contains information about following up after an interview.

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**In this Section** This section includes the topic “Handling Post-Interview Administration.”

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# Handling Post-Interview Administration

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**Introduction** This topic contains information about handling post-interview administration.

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**When to Perform** Handle post-interview administration upon completion of the interview.

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**How to Handle Post-Interview Administration** Follow the steps in the table below to handle post-interview administration.

<b>Step</b>	<b>Action</b>
1	Was a checklist used during the interview to ascertain that all of the discussion topics were covered? <ul style="list-style-type: none"><li>• If <i>yes</i>, go to Step 2.</li><li>• If <i>no</i>, clearly document the events and discussion topics of the interview in the veteran's file.</li></ul>
2	Place the record of the interview in the veteran's grant file.
3	Contact the Vocational Rehabilitation and Education Services (VR&E), the Prosthetics and Sensory Aids Services (P&SA), and Veterans Service Center (VSC) to advise them of the veteran's: <ul style="list-style-type: none"><li>• eligibility</li><li>• proposed housing plans, and</li><li>• interest in the benefits.</li></ul>
4	Update the veteran's grant file with: <ul style="list-style-type: none"><li>• departments/individuals contacted, and</li><li>• recommendations made by VR&amp;E and P&amp;SA.</li></ul>
5	Update the Specially Adapted Housing (SAH)/The Appraisal System (TAS).
6	Follow up with the veteran within 30 workdays to review items discussed during the initial interview, field review results, and to answer any questions.