



**Governor's Office of Planning and Budget
Office of the Legislative Fiscal Analyst**

Veteran Service Officers (VSO) Wait Times

A Report for the Utah Department of Veterans and Military Affairs

May 2026

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EXECUTIVE SUMMARY

The Utah Department of Veterans and Military Affairs (DVMA) helps veterans, current U.S. Armed Forces members, and their dependents secure earned military benefits, including healthcare, education, vocational training, and claims for compensation or Veteran and Survivor pensions. Veteran service officers (VSOs) within DVMA are trained and accredited to aid veterans in filing often complex benefit claims to the United States Department of Veterans Affairs (VA). Although other organizations in Utah provide similar services, DVMA employs the largest number of VSOs in the state and has earned a reputation for its high-quality service delivery to veterans. DVMA leadership and VSOs frequently strategize on how to meet the increasing demand for their services from a growing population of veterans. Trying to manage these increasing workloads while conducting outreach efforts is a challenge. Interferences from manual data entry, unstandardized practices, and lack of adequate veteran preparation prior to appointments sometimes hinder VSOs from helping veterans file their claims in a timely manner. This also contributes to long wait times for veterans seeking support to file a claim with the VA.

The Governor's Office of Planning and Budget and the Office of the Legislative Fiscal Analyst

(the evaluation team) collaborated with DVMA to identify opportunities to reduce veteran wait times for appointments to file their benefit claims. Evaluating DVMA processes revealed specific practices creating inefficient utilization of appointment windows:

1. Tying up appointments with veteran education and outreach.
2. Unused appointments from no-shows, cancellations, and excess inventory at some VSO locations.

Additionally, enhancements to data strategies, mentoring, and applying customer experience feedback are best practices to better balance workloads and inform DVMA leadership about the effectiveness of proposed process improvements.

This report establishes a robust set of measures to track resulting improvements in process efficiency and output while maintaining or amplifying the already high quality of service. This project aims to improve performance as indicated by these measures. The evaluation team supports the agency's progress toward those improvements through implementation of either opportunities described in this report, or through other methods the agency identifies.

OPPORTUNITIES



Prepare Veterans through Education



Match VSO Supply to Veteran Demand



Optimize Data Collection and Analysis



Promote and Invest in Success



EVALUATION MEASURES



Wait Time



POAs, Claims, and Ready-First Claims Submitted



Appointments per Claim Submitted



Cost per Claim



Customer Experience Sentiment Score

INTRODUCTION

PURPOSE & SCOPE

PURPOSE

The purpose of this evaluation was to:

1. Evaluate the claims assistance process beginning with the date a veteran files a power of attorney form (POA) with a Veteran Service Officer (VSO), and ending with a submitted claim to the U.S. Department of Veterans Affairs (VA) benefits branch (Veterans Benefits Administration).
2. Identify opportunities to optimize labor input to the process while improving service delivery to veterans throughout the state of Utah and reducing overall wait times.

SCOPE

The evaluation team reviewed the process for providing claims assistance to veterans through VSOs to help veterans receive benefits that they may be eligible for and enhance service delivery by:

- Analyzing operational and financial data from July-October 2025.
- Analyzing customer experience data from March 2023-October 2025.
- Shadowing and interviewing employees.
- Performing walkthroughs of systems and software.
- Researching industry best practices.
- Reviewing existing programs, policies, and procedures.

Utah has a growing population of military veterans, with an estimated total of 126,000 veterans.² A population breakdown by period of service is shown in **Figure 1**. The Department of Veterans and Military Affairs often serves as an initial point of contact for veterans throughout the state of Utah by helping them navigate the complex federal landscape for the provision of a variety of veteran benefits. Of these veterans, nearly 40,000 (32%) receive pension or compensation benefits.³ DVMA currently employs 12 VSOs whose primary role is to work directly with veterans experiencing service-related disabilities and get them connected to VA

benefits. However, veterans also contact VSOs for guidance related to planning their education, accessing VA healthcare, receiving burial benefits, and obtaining legal assistance, among many other services. Though outside of their scope of work, VSOs often take ownership of veterans' requests



*DVMA's mission is to "enrich the lives of Veterans, service members, and their families and grow the military workload in Utah, by offering innovative programs and services, promoting military and veteran friendly communities and collaborating with partners."*¹

¹ [Utah Department of Veterans and Military Affairs Strategic Plan 2024.](#)

² https://www.va.gov/vetdata/veteran_population.asp estimate as of September 2025.

³ https://www.data.va.gov/dataset/health_benefits/5b4p-6aq2/about_data last updated June 2024, so the percentage of service-connected veterans is likely higher.

and refer them to partner organizations and programs that provide these services, including homeless and in-crisis veteran services.

VSOs are assigned specific regions and connect with as many veterans as possible through outreach efforts that consist of promotional activities and walk-in clinics. Finding the balance between managing appointments, filing claims, and marketing their services can be difficult. Given the range of responsibilities VSOs have and the complexities of the claims process, there

is a constraint on capacity to meet the demand for services. This can lead to long wait times for appointments, which can delay veterans receiving economic benefits from their service connection. Therefore, establishing an efficient process that accounts for competing priorities is essential for improving the quality of life for veterans through economic gains.

Figure 1. Current Population of Veterans in Utah, as of September 2025.










Summary of Evaluation Measures and Opportunities for Improvement

To align this evaluation and subsequent actions with measurable improvements to operations and outcomes, the evaluation team developed a set of measures for tracking and reporting (see **Table 1**). DVMA annually reports a key outcome measure for its claims assistance process within its outreach services—the annual value of benefits received by Utah Veterans (\$959 million for FY 2025).⁴ Focusing on claims assistance services, the following process-centered measures will

reflect detailed changes in efficiency, quality, and service delivery that should ultimately contribute to improved outcomes in Utah veterans’ benefit claims. Progress for these measures will be reported annually by October 1st, in accordance with [Utah State Code Section 63J-1-904\(3\)](#). DVMA has flexibility in the changes they implement to improve the metrics over time.

⁴ Annual line item measures are reported by DVMA in the [Compendium of Budget Information \(COBI\)](#).

Table 1. Summary of Evaluation Measures.⁵

Icon	Title & Description	Baseline	Desired Target Direction	Reporting Timeline
<i>Outcome Measure</i>				
Existing Line-Item Measure	Veterans Benefits Received The dollar value (in millions) of benefits received by Utah veterans in the past year from assistance with filing claims.	\$900 million	\$918 million (2% Increase)	Annually
<i>Efficiency Measure</i>				
	1. Wait time Average number of weeks to the Third Next Available Appointment (TNAA) based on VSO and location, calculated on the first business day of each month.	6 week average	4 week average (33% Decrease)	Quarterly
<i>Quality Measures</i>				
	2. Ready-First Claims Percentage of claims submitted within three days of filing a POA with a VSO.	38%	43% (5% Increase)	Quarterly
	3. CX Sentiment Score Average score generated from veteran responses to VSO experience surveys, based on assigned positive or negative opinions ranging from -2 to 2.	0.76	0.95 (25% Increase)	Annually
<i>Process Measures</i>				
	4. POAs Filed Number of POAs filed to give DVMA representation of a veteran in the claims process.	871 POAs/qtr	915 POAs/qtr (5% Increase)	Quarterly
	5. Claims Submitted Total number of claims submitted.	1,088 claims/qtr	1,142 claims/qtr (5% Increase)	Quarterly
	6. Appointments per Claim Submitted Average number of appointments recorded in VetPro by a VSO per claim submitted.	1.55	1.47 (5% Decrease)	Quarterly
	7. Cost per Claim Total VSO wages expended per total claims submitted.	\$152.59 (in FY26 Q1)	\$144.96 (5% Decrease)	Quarterly

⁵ Baseline values come from data during fiscal year 2026 quarter 1 (July 2025 to September 2025). Metrics should be tracked quarterly but will be reported annually once a full year of data is available. Customer experience sentiment score is based on the calendar year 2024 average.

Additionally, the team identified four broad actionable opportunities for DVMA to improve the process. These ideas were collaboratively determined between the evaluation team and

representatives from DVMA. Implementing these improvements should reduce wait times and elevate VSO performance to enable them to make streamlined decisions.

Table 2. Summary of Opportunities, Suggested Next Steps, and Evaluation Measures.

Opportunity 1: Prepare Veterans through Education		Pg. #
1.1	Require “Reason for Appointment” at time of scheduling.	9
1.2	Develop videos to train veterans on what they need to know before appointments.	9
Targeted Evaluation Measures - 1, 2, 6		
Opportunity 2: Match VSO Supply to Veteran Demand		Pg. #
2.1	Evaluate data to assess placement of VSOs for appointments.	12
2.2	Prepare veterans through reminder calls, SMS texts, and emails.	12
2.3	Establish additional best practices for VSOs and promote success.	12
2.4	Provide more appointment options.	12
Targeted Evaluation Measures - 4, 5		
Opportunity 3: Optimize Data Collection and Analysis		Pg. #
3.1	Define and standardize “interactions.”	13
3.2	Develop a coding system for the VetPro “Notes” section.	14
3.3	Translate Google Calendar information into quantifiable data.	14
Targeted Evaluation Measures - 6, 7		
Opportunity 4: Promote and Invest in Success		Pg. #
4.1	Train VSOs on how to prioritize essential tasks for high-volume referrals.	17
4.2	Differentiate between the outreach process and claims assistance process.	17
4.3	Increase utilization of customer experience feedback.	18
Targeted Evaluation Measures - 3, 7		

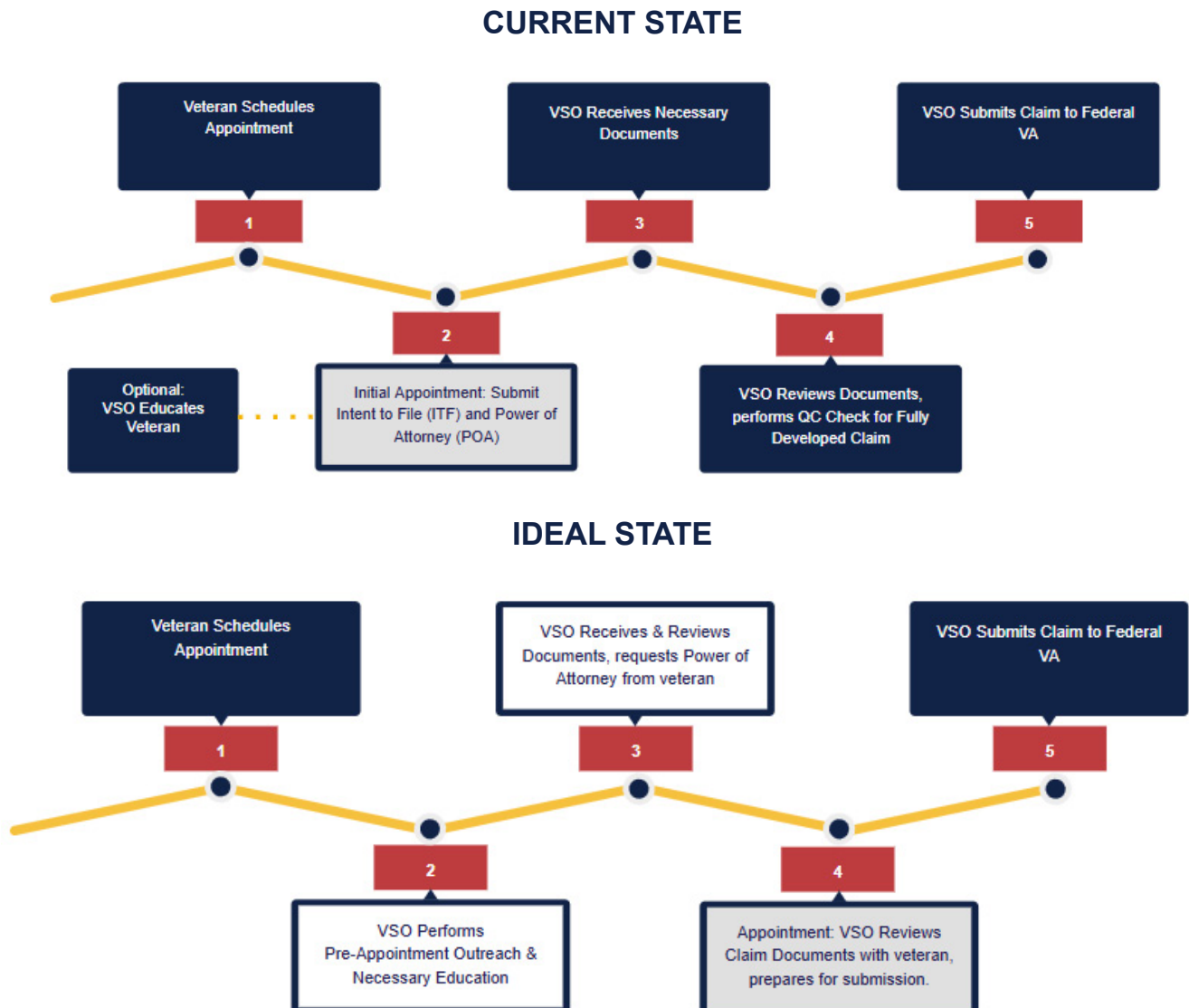
ANALYSIS OF CURRENT PROCESS

The claims assistance process informally begins when initial contact is made between the veteran and a VSO, as depicted in **Figure 2**. Veterans can schedule appointments in person, during outreach events, through the DVMA website, or by phone. For veterans who may not be able to obtain an appointment, VSOs coordinate walk-in days during designated times of the month, especially in rural parts of Utah. At an appointment with a VSO, veterans can expect to receive education on the claims filing process with the VA. If a veteran

decides to proceed with the process, they can file a power of attorney (POA) using a VA form that grants a VSO representation of the veteran throughout the claims process, which formally initiates the claims assistance process.

Ideally, veterans are ready to file a claim with all the proper documentation at the first appointment. When veterans are not ready to file a claim, they have the option to complete an Intent-to-File (ITF) document that establishes the effective

Figure 2. Current and Ideal States of the Claims Assistance Process.



date of benefits and allows up to 12 months from the date of the ITF to file the claim. The DVMA process ends with a filed claim and the VA's claim review process begins. Veterans will receive correspondence from the VA to schedule Compensation and Pension (C&P) Exams for determination of severity of a medical condition and connection of the condition to service. At the end of the months-long process, veterans receive notification from the VA of whether their claims were granted or denied.

Many times, veterans will reach out to their VSO with questions or to understand what the VA decision means. They may appeal decisions through their VSO if they disagree with the results. Claims are likely denied because they did not meet at least one of three criteria: 1) a military period of service with an honorable type discharge ("qualifying period of service"); 2) a currently diagnosed disabling medical condition affecting quality of life; and 3) a link between the medically diagnosed condition claimed and the qualifying period of service.

Process Opportunities

VSOs already run an effective program, helping DVMA connect 3,791 veterans in FY 2025 to appropriate services. The evaluation team's collaborative efforts with DVMA identified key opportunities to improve various steps and outcomes of the claims assistance process:

- 1. Optimize Management of Work-in-Process (WIP).** VSOs represent several veterans at once but sometimes encounter barriers to getting their claims filed. This can be a result of various factors, including lack of veteran preparation prior to an appointment, VSO level of experience, and prioritization of value-added activities.
- 2. Adequately Prepare Veterans Prior to Appointment.** On several occasions, veterans attend their first appointment without a predetermined goal. They may not know the criteria for a claim, the documentation required, or what conditions they are filing for. All appointments are

scheduled for 45-90 minutes depending on the claim, but most of the first visit is spent educating the veteran, which can lead to excessive follow-up efforts from the VSO.

- 3. Align Expectations for Task Prioritization.** While VSOs have policies and procedures to guide their work, there is inconsistent understanding of what tasks they should prioritize. The expectations between management and leadership are disconnected regarding how much time managers should spend on mentoring employees and working with their own claims.
- 4. Standardize Data Entry.** Currently, VSOs manually record large amounts of information for each interaction with a veteran or their claim. However, DVMA does not have a systematic way to record the information, which can result in unorganized, disjointed, fragmented, and duplicate data.
- 5. Balance Workload to Create Manager Availability.** Regional managers are efficient and effective VSOs with elevated demand for their services by veterans. This popularity limits their appointment availability, resulting in no openings for the next three months for one manager. Therefore, directing some claims assistance requests to their staff can help balance workloads, especially from high-volume sources and referrals. Such practices help alleviate excessive veteran wait times for a particular VSO, while mentoring less experienced VSOs in high-volume claim types and relationship building.
- 6. Utilize Customer Experience Tools and Data.** Customer experience surveys can be a valuable mechanism for collecting real-time feedback on the services provided to veterans from VSOs. As of this report, DVMA collects minimal input from veterans and has not been able to readily access data to address customer sentiment until recently.

OPPORTUNITIES

Opportunity 1: Prepare Veterans through Education

Frontload education prior to first appointments with veterans and establish processes to prepare veterans for the initial meeting with a VSO.

When veterans are adequately prepared for their first appointment with a VSO, there are fewer barriers preventing them from filing a claim at that time. Although not a requirement to submit claims on the date of a first appointment, avoiding the need for subsequent appointments can improve availability and limit inquiries on the status of their claim. The evaluation team identified about 46% of veterans from July to October 2025 who had submitted a claim within three days of filing a POA with a VSO. The remainder of veterans consist of claims filed at a later date or claims not filed at all. The number of veterans who filed a POA and a claim on the same day was about 14% during that same time period. **Table 3** summarizes the total amount of claims, POAs, and engagements with veterans.

Total Veterans Engaged	1,693
Total Veterans with POA & Claim Filed	576
Total Veterans with POA Filed Only	411
Total Veterans with Claim Filed Only	510
Total Veterans with no POA or Claim Filed	196
Approximately 46% of veterans filed a claim within three days of the date of POA submission.	

Successful Implementation of Opportunity should Improve:

- Wait Time.
- Appointments per Claim Submitted.
- Ready-First Claims.

Education Before Appointments Creates Time Efficiency

Veterans are routinely educated about the VA claims process during the first visit with a VSO, which is later than ideal to learn why they might want to file claims. By frontloading education efforts prior to the first appointment as much as possible, veterans would be better equipped to file a claim. For example, some VSOs outline documentation requirements for different claim types on their appointment screen at veterans.utah.gov/regional-offices/, while others only provide their location information. Additionally, something as simple as requiring veterans to provide the purpose for their appointment at the time of scheduling could improve their awareness and preparedness. When veterans attend their appointments prepared, VSOs can spend most of the time establishing the three criteria for a claim, securing representation of the veteran, and even submitting the claim during the visit without need for additional appointments or unnecessary steps.

Suggested Next Steps

- 1.1 Require “Reason for Appointment” at Time of Scheduling.** Having veterans select their reason for an appointment guides them to know what they want to accomplish at the first appointment. It also gives VSOs more context so that they can be prepared for the appointment. This provides a chance for veterans to receive communication leading up to the appointment so that they can bring the necessary information. Currently, VSOs provide a homework sheet at the end of the first appointment, but this is something that could be provided before appointments if veterans know the meeting’s purpose.
- 1.2 Develop Videos to Train Veterans on What They Need to Know Before Appointments.** While DVMA has some videos on their website to teach veterans about the general claims process through the VA, there could be more efforts regarding specific details of the process.⁶ VSOs could come together and discuss the shortfalls for veteran preparedness and develop videos, how-to guides, and other media to educate veterans. When an appointment is scheduled, DVMA could also direct veterans to these sources, including a possible “Know Before You Go” document.

⁶ Survey data from DVMA staff reflected the importance of developing more educational content for veterans before they attend appointments.

Opportunity 2: Match VSO Supply to Veteran Demand

Utilize existing location data as well as VSO reputation and established connections with veterans to balance the workload between managers and VSOs.

The existing process for aligning veterans with VSOs does not systematically do this by balancing supply and demand for VSO time but allows veterans to freely select based on various factors. Some locations where appointments are offered have lower foot traffic than other areas across the state depending on the day of the week (see **Figure 3**). Appointment duration can be tailored based on veteran intention for the visit. Because decisions on where, when, and whom to have an appointment are largely left to veterans, there is an opportunity to route veterans to specific areas or VSOs depending on availability, expertise, appointment purpose, and other factors.

Matching Supply to Demand Based on Location Can Maximize Veteran Reach

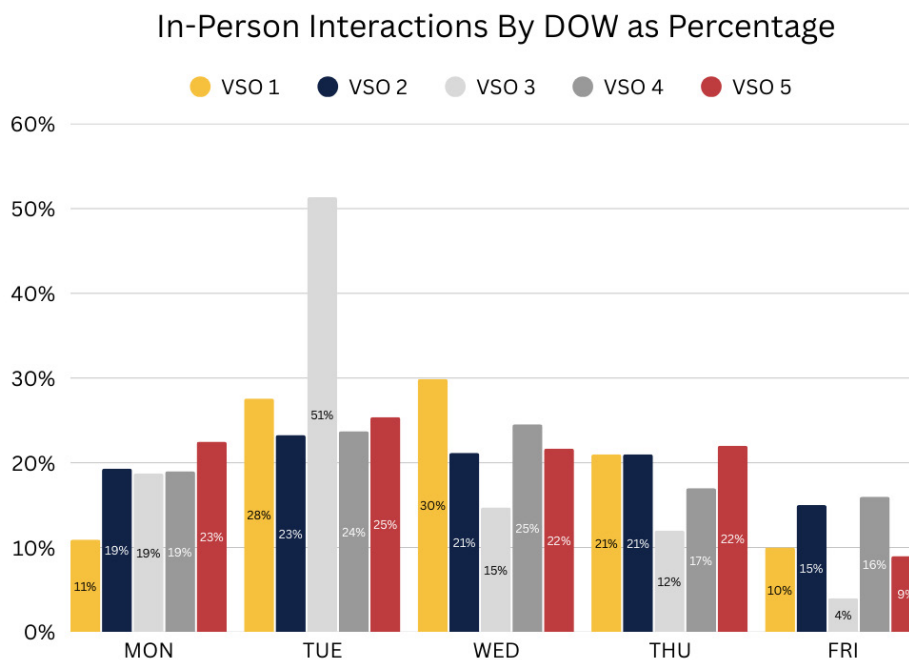
VSOs work out of VA health clinics, veteran nursing homes, Department of Workforce Services (DWS) buildings, and other locations. Some locations are

frequent destinations for veterans while others have good visibility, making VSOs easy to contact for veterans. However, some locations are not as productive. For example, the Monday location for VSO 1 (leftmost column) in **Figure 3** has a significantly lower rate of in-person appointments. Veterans could elect to travel to another location for access to sooner appointments if DVMA advertises additional capacity on its booking website by region. Moreover, Friday is a lower day across the board for VSOs as they focus on uploading documentation and other administrative tasks. Cancellations and no-shows can play a factor as the evaluation team observed during job shadowing. By matching VSO supply to veteran service demand and advertising where sooner appointments exist, DVMA can maximize its reach to veterans in hot spots throughout the state if a veteran is willing and able to travel to another location.

Veteran Preparedness Could Reduce No-Shows and Cancellations

No-shows and cancellations can be the result of a variety of factors. Often, veterans may not remember they scheduled an appointment, especially if they are scheduling weeks before due to long wait times. Sending reminders in advance with information about their upcoming appointment

Figure 3. In-Person Interactions between VSOs and Veterans by Day of the Week (DOW).



and a list of items to bring with them can help reduce no-shows and cancellations. With enough lead time, a potential no-show could be cancelled to free up a slot for another veteran.

Closing Out Work-in-Process Can Reduce Ancillary Activities

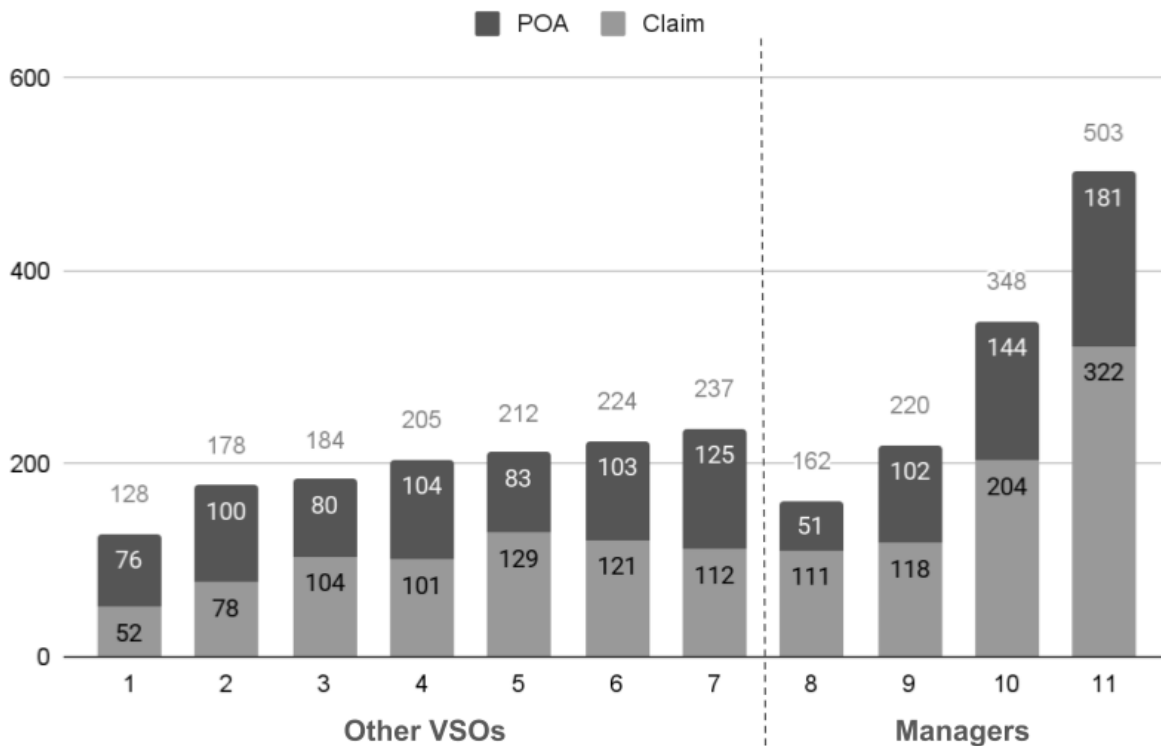
Regional managers are the most efficient VSOs regarding the number of claims filed and veteran interactions. They average 1.81 interactions per submitted claim, compared to the 3.20 interactions per claim of the other VSOs, marking a significant difference in time spent on each claim.⁷ Another example is shown in **Figure 4**, which is the distribution of POAs filed and claims submitted between VSOs and their managers. Training and mentorship from regional managers can help other VSOs identify additional best practices for closing out their existing work-in-process by getting

claims submitted for the veterans they represent through POAs filed. Preparing VSOs to close out the current claims that they are working on, thereby reducing work-in-process, can result in more availability for appointments and claim filing. This can also help them increase the number of veterans they engage with over time. Without finishing claims for existing POAs, it can be challenging to add more represented veterans to a VSO's workload.

Tailoring Appointments Can Result in Better Use of Appointment Time

Not all appointments require the same allotment of time to have a successful result. Adding more options for veterans at the time of scheduling can better prepare them for their appointments and also provide additional time for VSOs to meet with more veterans. Customizing appointments according to the need could result in 15-minute

Figure 4. Breakdown of POAs and Claims Filed by Employee from July to October 2025.



Note. Variations in number of claims and POAs filed between managers can be due to regional differences.

⁷ DVMA operational data from July to October 2025.

Successful Implementation of Opportunity should Improve:

- Claims Submitted.
- POAS Submitted.

Suggested Next Steps

2.1 Evaluate Data to Assess VSO Placement and Advertise Appointment Availability.

Utilizing existing VetPro data and connecting it to scheduling data from Google Calendar can reveal important insights to the locations where VSOs interact with the most veterans. DVMA leadership and regional managers should review in-person interaction data for satellite locations and determine which areas continue to make sense for VSO placement, based on in-person appointment utilization and claims filed. Additionally, DVMA could consider advertising the soonest appointment time by region on its page for booking appointments.

2.2 Prepare Veterans through Reminder Calls, SMS Texts, and Emails.

Cancellations and no-shows are disruptions to the services VSOs provide that can lead to waste or downtime. Standardizing efforts around reminders for appointments can reduce the amount of time lost from these situations. DVMA should identify when to send reminders, what content they should contain, and how this can ultimately better prepare veterans for upcoming appointments. Eventually, this can be a largely automated process.

2.3 Establish Additional Best Practices for VSOs and Promote Success.

Based on the performance of the most efficient VSOs and their existing successes, DVMA should document additional best practices to help newer and less-experienced VSOs. Part of

this program could amplify efforts around mentorship and training. By realigning managerial efforts to focus more on mentoring employees over claims assistance with veterans, production VSOs will be empowered to find more efficient ways to perform their responsibilities, focusing on tasks that would complete claims while attempting to minimize ancillary activities that do not result in claims.

2.4 Provide More Appointment Options.

One way for DVMA to increase the number of meetings with veterans is by providing more options for types of appointments. This can help avoid appointments where veterans meet with a VSO only to learn that they simply need a referral to a service offered by an external provider, such as DWS. DVMA could strategically structure appointment availability based on data analysis of the most frequent reasons for appointments. DVMA's calendar application can do this by identifying the type of claim a veteran wants to file and limiting the minutes allotted to an appointment based on the estimated time it takes to complete the service being offered. For instance, referrals may take less than 10 minutes, whereas filing a claim can take up to an hour or even 90 minutes in some cases.

Opportunity 3: Optimize Data Collection and Analysis

Standardize data collection and recording for veteran interactions and calendar schedules based on highest data needs.

Presently, DVMA utilizes VetPro to manage records and claims and Google Calendar for scheduling purposes. As an off the shelf solution, VetPro lacks the capability for DVMA to customize additional standardized fields and relies on free-response notetaking to document VSO interactions. VetPro records also do not allow two-way interactions with the VA system, requiring VSOs to rely heavily on manual data entry. VetPro can send information to the VA but cannot receive information from them. The lack of standardization in recording data to VetPro can result in suboptimal data management. While DVMA gathers large amounts of data, VSOs and management can better utilize this information when it is standardized.

Standardizing Interactions and Notetaking Can Result in Efficiency Gains

For every encounter with a veteran or update to a claim, VSOs record an interaction and provide notes explaining what they did. However, there is no uniform understanding of what VSOs should record as an interaction, leaving it up to their discretion. Data entry for interactions and notes can be time consuming, depending on the level of detail VSOs provide. Standardizing interactions and notetaking can reduce administrative burdens associated with manual data entry. It can also make it easier to interpret records quickly when other VSOs need to access the data.

Developing Guidance for VetPro Recording Can Reduce Data Inconsistencies

VetPro is an intuitive system but lacks capabilities for automatically standardizing certain pieces of information, such as interactions and record notes.

Developing documented guidance could protect data from fragmentation and duplication, making it easier to access, manage, and review records. Ultimately, this could enhance data management, making it easier to identify trends.

Accessing Calendar Data Can Lead to Valuable Scheduling Insights

Google Calendar does not provide an easy way to translate information from VSO schedules to manageable data. Finding a way to convert appointments into data can help identify trends in no-show appointments, cancellations, and interactions with veterans. Monitoring this data can also lead to better time management as merging this data with interactions data can help leadership identify the nature of some interaction types. As an example, phone interactions can represent significant appointments where POAs and claims can be finalized. Sometimes they could be informational, providing simple status updates or directing veterans to other resources. Without this detail, phone interactions create uncertainty about how claims are being processed.

Successful Implementation of Opportunity should Improve:

- Appointments per Claim Submitted.
- Cost per Claim.

Suggested Next Steps

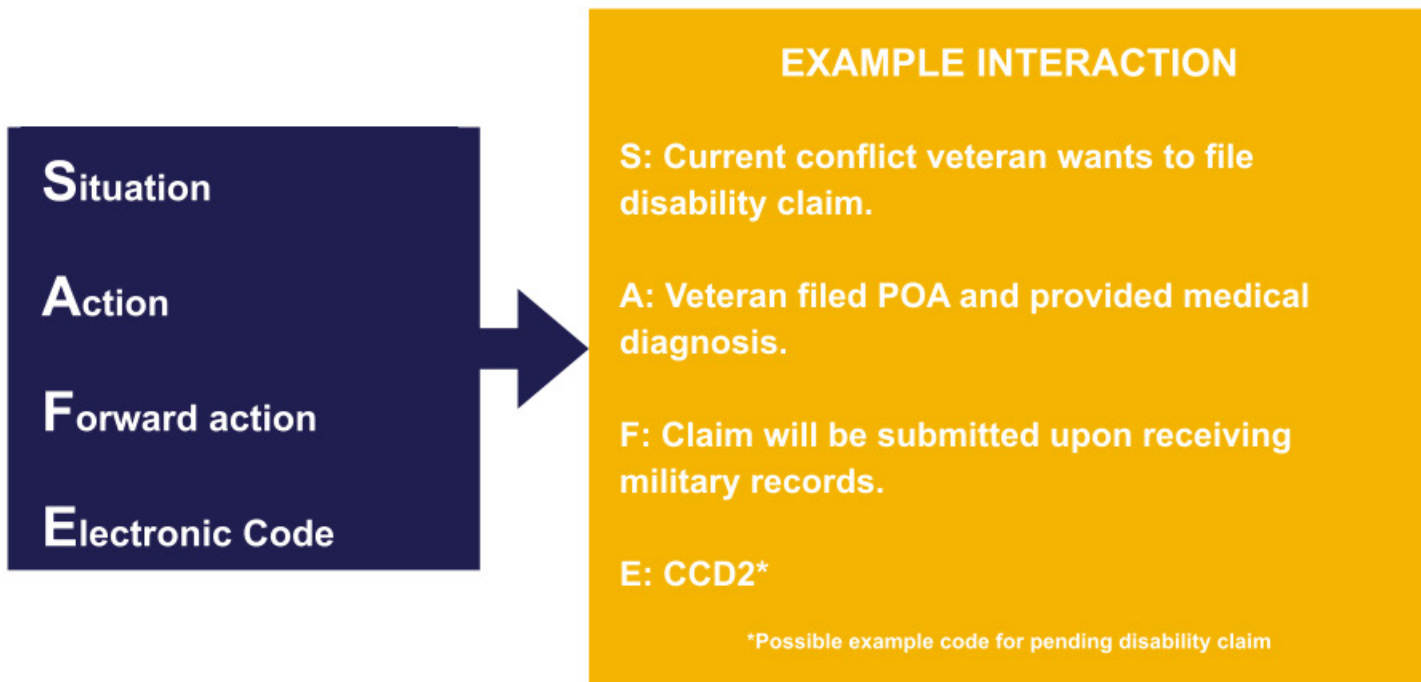
- 3.1 Define and Standardize “Interactions.”**
Interactions contain a broad range of activities,⁸ making it difficult to easily identify trends in the most valuable activities performed by VSOs. DVMA should define and standardize interactions to avoid confusion and inconsistent usage among VSOs. This will enhance data management and streamline quality reviews of claims and records.

8 Operational data provided by DVMA showed that “interactions” are categorized by type, including email, phone, fax, review, online, outreach, and others. Due to manual entry, data cleaning was required to address typos or inconsistent capitalization.

3.2 Develop a Coding System for the VetPro “Notes” Section. VSOs input notes at the end of every interaction with a veteran or for each record update. To standardize notetaking across VSOs, management should establish a coding system or a method of shorthand that is easily recognizable by staff. For example, the Texas Veterans Commission has established a policy known as SAFE as a means of shortening notes and improving consistency (see Figure 5). DVMA could follow a similar approach and include numbers that are associated with the most common types of encounters with veterans. Developing this system will help streamline recordkeeping and enable optimal utilization of data to better track trends and performance.

3.3 Translate Google Calendar Information into Quantifiable Data. Accessing data from Google Calendar can be a complicated and cumbersome process. However, there are software and add-ons that can make it more manageable. DVMA should explore strategies to connect calendar data to VetPro data. For example, the data output from a script can be connected with existing data exported from VetPro to provide more valuable and rich insight for assessing performance and trends over time.

Figure 5. Using “SAFE” to Streamline Data Entry.



Note. The SAFE policy document was provided to the evaluation team from the Texas Veterans Commission.

Opportunity 4: Promote and Invest in Success

Share VSO successes with other employees that serve as a foundation for best practices and explore ways to prioritize tasks, offload administrative work, and improve customer service.

Capacity to work with more veterans throughout the state is constrained by misaligned expectations, inconsistent prioritization of tasks, and insufficient support services for VSO administrative work. Regional managers spend most of their time on value-added activities such as appointments with veterans and claim submissions. However, shifting some of the manager's workload to other VSOs on their team would give them more time to mentor. Without consistent training and best practices for VSOs, this leads to confusion around which tasks merit the greatest priority.

To elevate the VSO program and identify effort prioritization, DVMA collects limited feedback from veterans through the statewide customer experience initiative.⁹ Leadership can better leverage this data through access to results and a higher volume of participating veterans. Customer experience responses are focused on a small group of VSOs who provide links in their correspondence and materials. Additionally, DVMA leadership obtained initial access to survey feedback as part of this project to inform the resulting analysis.

Managers Can Teach High-Volume Practices by Directing Referrals to Other VSOs

Available appointments are relatively limited for some managers compared to the VSOs they oversee because of their referral networks. During this evaluation, one manager had almost no available appointments going out 90 days for veterans to schedule online. These appointments were frequently utilized by an established channel

of high-volume veteran referrals. Referrals from entities are also beneficial, such as those through the VA Hospital campus in Salt Lake, which can help manage expectations and meet claim documentation requirements. Therefore, encouraging managers to have their staff process these claims can help meet veteran demand from these sources. This allows managers to teach practices and strategies in these high-volume sources which can be applied to veterans who may be navigating the process without the support of a referring entity. Directing these referrals requires additional training, support, and mentorship from managers, which impacts the distribution of their taskload and should receive appropriate prioritization (see Figure 6).

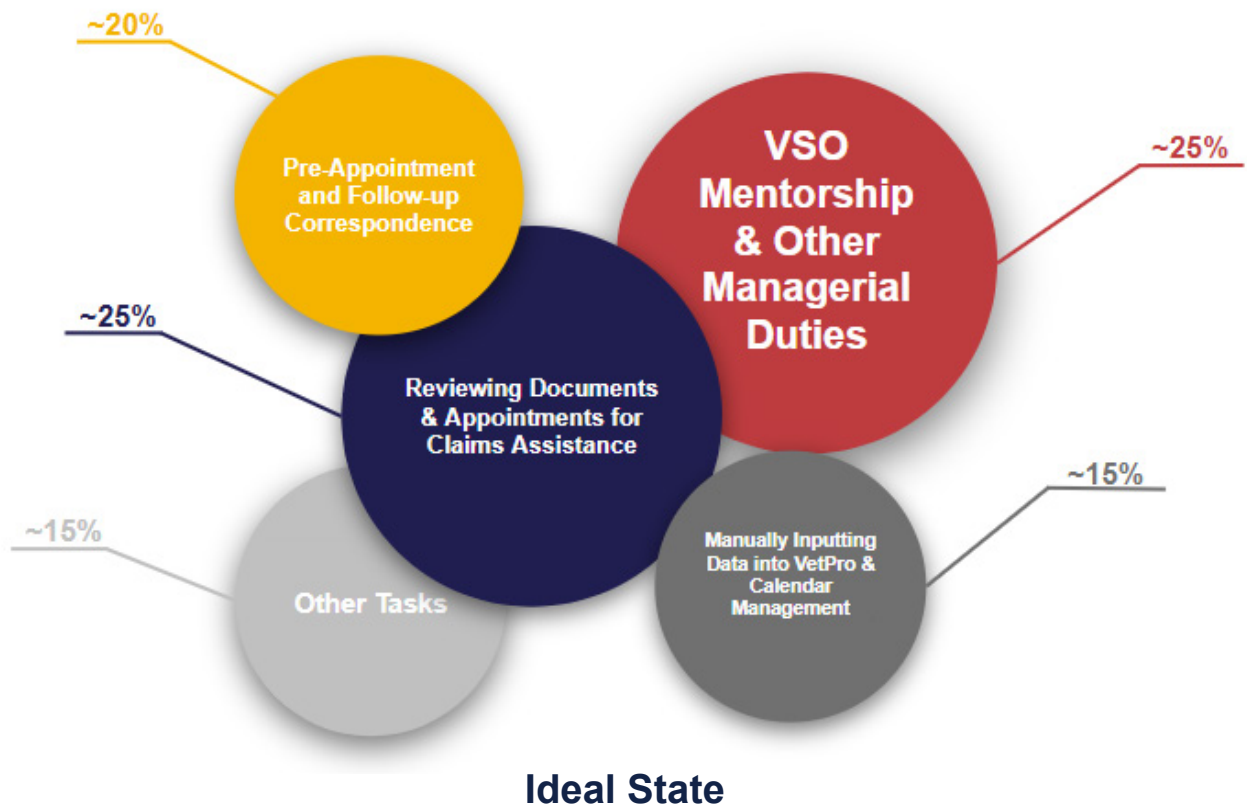
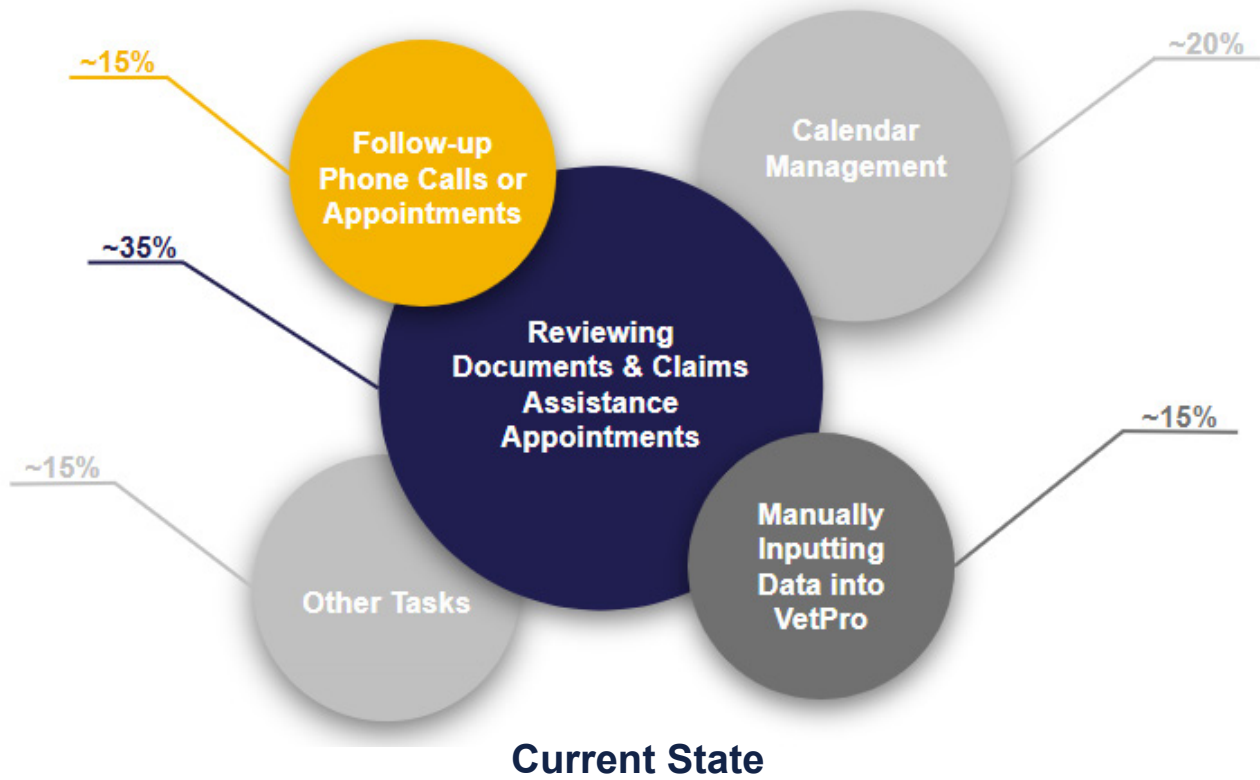
Mentorship Could Help Balance Claim Assistance Activities with Veteran Outreach

Outreach efforts are an important responsibility for VSOs, who are educational outreach specialists. However, outreach efforts can be time-consuming and sometimes do not yield desired progress towards claim development. Therefore, managers can help mentor less experienced staff on balancing veteran outreach and relationship-building with prioritizing their primary objective of helping veterans navigate the U.S. Department of Veterans Affairs' complex claims process.

Additionally, distinguishing outreach efforts from claims assistance activities provides an opportunity to develop strategic efforts around veteran homelessness. Veterans without housing have a greater need for service connection to the VA as many of them experience disabilities from their time of service. VSOs with more experience assisting veterans who are homeless can mentor other VSOs on best practices in this high-need area while helping to develop an overall outreach strategy for this population.

⁹ From 2023 to 2025, DVMA saw an average sentiment score of 0.47 on a scale of -2 to 2. Most veterans indicated a positive experience throughout the claims assistance process, but there remains opportunity to improve.

Figure 6. Current and Ideal States for VSO Manager Tasks.



Note. Data gathered from VSO manager feedback form. "Other Tasks" include referrals for services outside claims assistance and other phone calls.

Expanding Customer Feedback Improves VSO Service Delivery

Increasing the number of survey responses from veterans can identify trends in the quality of service they receive from VSOs. Providing an opportunity to request open-ended feedback can also generate ideas for improvements to the claims assistance process. These ideas can then become projects completed by DVMA to enhance service delivery. Implementing feedback from surveys will also improve veteran sentiment of the overall program and services received. **Figure 7** illustrates the current distribution of veteran sentiment towards the claims assistance process from March 2023 to October 2025.

Successful Implementation of Opportunity should Improve:

- CX Sentiment Score.
- Cost Per Claim.

Suggested Next Steps

4.1 Train VSOs on How to Prioritize Essential Tasks for High-Volume Referrals.

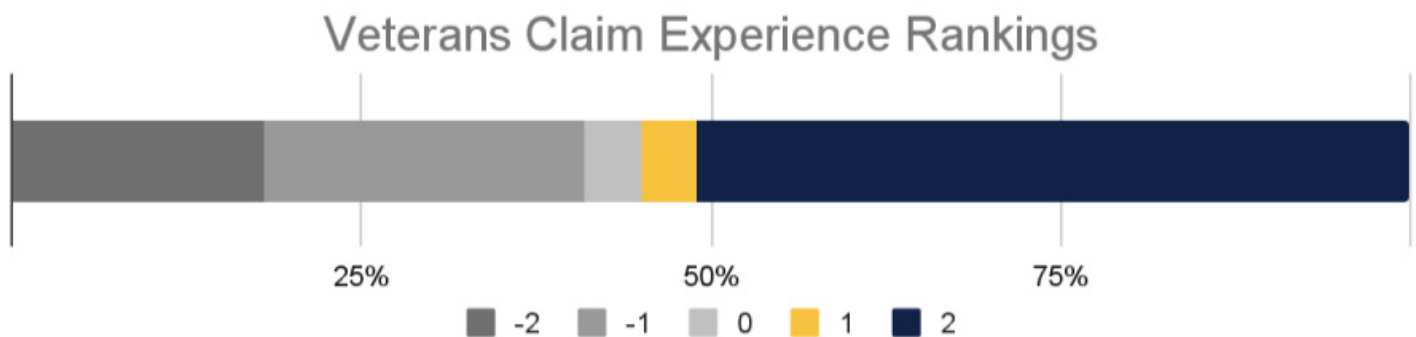
Regional managers could leverage their established reputation in their region and existing connections with veterans to shift some of their referral workload to their staff. These high-volume referrals can quickly

provide less experienced VSOs opportunity to practice strategies from their managers on how to streamline claims assistance. Working with veterans who may have a referring entity could also provide assistance acquiring required documentation support for their claims. Managers could also create a tiered decision tree or map to help employees recognize the tasks that should require most of their time.

4.2 Differentiate Between the Outreach Process and Claims Assistance Process

VSO managers have developed a positive reputation for working with the veterans in their regions. They have learned how to balance activities between the outreach process and the claims assistance process. Leveraging their experiences, relationships, and understanding of these activities can benefit the VSOs working in each region. DVMA should encourage mentorship and training from managers to their employees to strike a balance between claims assistance and outreach efforts. VSOs with developed expertise in assisting specific populations of veterans should also provide guidance to other employees. For example, VSOs who help more homeless veterans can identify ways to increase outreach efforts for this population and train other VSOs on how to best help them.

Figure 7. Current Veteran Sentiment of the Claims Assistance Process.



Note. These scores represent how veterans rated their claims assistance experience. This is a scale from unpleasant (-2) to pleasant (2), with 0 being neutral.

4.3 Increase Utilization of Customer Experience Feedback.

Now that DVMA has access to existing veteran feedback from interactions with VSOs, they should regularly monitor the data for trends. The agency should incorporate existing suggestions from veterans into process improvements. Then the agency can focus on increasing customer survey responses by marketing them and providing QR codes in convenient locations for veterans to use them. Soliciting feedback can be built into the final stages of an appointment as well. **Figure 8** summarizes the top three suggestions received from veterans who provided survey feedback between 2023 and 2025.

Figure 8. Top Three Suggestions from Veterans to Improve VSO Claims Assistance Experience.



CONCLUSION & NEXT STEPS

Since the beginning of the project, DVMA has proactively worked on identifying and implementing ideas for improving the claims assistance process. As the evaluation team and DVMA collaboratively worked on this project, the agency began to implement changes to streamline the process and provide additional support to their VSOs. DVMA should continue these efforts to expand their impact on veterans throughout the state. Opportunities presented in this report provide a foundation to build upon, with the expectation of continual improvement. These opportunities include: preparing veterans prior to appointments, matching VSO supply to veteran service demand, optimizing existing data and systems to monitor performance, and promoting and investing in success through employee development and customer experience feedback.

Effective and strategic implementation of these opportunities should lead to elevated performance by reducing wait times, increasing claim submission, optimizing interactions with veterans, and enhancing service delivery to veterans. The evaluation team will continue to collaborate with the agency as they begin to implement changes based on the opportunities and evaluation measures from this project. Improving performance remains the primary objective. Therefore, DVMA should feel empowered to pursue alternative solutions for addressing inefficiencies identified in this report when necessary, if it means making a positive impact on the evaluation measures.

Table 4. Deliverables Expected.

Milestone	Description	Key Dates
1	Begin Implementation Phase with GOPB Support	Est. Start: January 2026
2	Finalize Implementation Phase	Est. Completion: July 2027
3	Data collection for evaluation measures	Start: July 2026 End: July 2027
4	OLAG may begin initial validation of metric progress	Anticipated in July 2027

APPENDIX

Overview of Efficiency Evaluation Process and Mandate

The Governor’s Office of Planning and Budget (GOPB) and the Office of the Legislative Fiscal Analyst (LFA) are directed in [UCA 63J-1-904](#) to “jointly operate a process to identify and prioritize government processes to target for efficiency improvements.” To fulfill this directive, GOPB and LFA operate a joint efficiency evaluation team to select government processes and conduct reviews. Following the joint team’s report and time for the responsible agency to implement process improvements, progress is independently reviewed and verified by the Office of the Legislative Auditor General (OLAG).

In the 2025 General Session, [H.B. 317 Executive Agency Innovation Incentives](#) updated the statutory requirements in [63J-1-904](#) to specify that each efficiency improvement process should address “metrics demonstrating success, including: (i) service delivery savings; (ii) cost-savings; or (iii) time-savings” and “rewards, recognitions, or incentives” for agencies implementing efficiency improvements. Reviewed agencies are also allowed to request that cost savings resulting from efficiency improvements be retained as non-lapsing funds and be used for employee retention or employee performance incentives.

Methodology

Interviews

The evaluation team conducted interviews with administrators and staff from across the process system, including DVMA veteran service officers (VSOs), VSO regional managers, and the lead VSO manager.

Agency Data Requests

The evaluation team completed analysis of current system efficiency, process flow, and outcomes based on internal agency data provided by DVMA. This data informed the creation of the evaluation measures that will be tracked and reported on following implementation.

Interstate Policy Scan

The evaluation team reached out to states with similarly structured claims assistance processes through VSOs to inquire about those states’ best practices related to collecting and integrating mental health information into decisions. Based on limited responses, the team identified relevant information regarding Texas’s utilization of VSOs, the scheduling system for appointments, and how they use their data.

Voice of Customer (VOC) and CTQ Tree (Critical to Quality)

The evaluation team reviewed customer requirements captured through customer experience surveys. This feedback was categorized into specific characteristics to enhance service quality as an outcome of the claims assistance process. Veteran suggestions were incorporated into the proposed solutions in this report.

Theory of Constraints & Rules of Flow

Throughout the evaluation process, the evaluation team worked to understand the current operations of the system through the lens of the “Theory of Constraints,” (TOC) which states that “every system, be it a manufacturing line, a service operation, or a project workflow, is bound by at least one constraint – a bottleneck or limiting factor that impedes progress and hinders the achievement of desired goals” (Theory of Constraints). After identifying the constraints present in the system, we identified

opportunities intended to maximize the capacity of those constraints using existing resources and redesigning other process steps to support the needs of the constraints. Key TOC concepts such as throughput maximization and task prioritization informed many of our specific proposed solutions.

Sources

- [UCA 63J-1-9 Government Performance Reporting and Efficiency Process.](#)
- [Utah Department of Veterans and Military Affairs Strategic Plan 2024.](#)
- DVMA Internal Agency Data - Provided to the evaluation team between October-December 2025.

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This report was written as part of a joint collaboration between the Utah Governor's Office of Planning and Budget and the Office of the Legislative Fiscal Analyst.

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