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# Casualty Assistance Calls Officer Notification Checklist

## Preparation

- Contact regional CAC office prior to departure for specific guidance.**
- Personnel Casualty Report and Other Forms:** Obtain a copy of the Personnel Casualty Report (PCR), Record of Emergency Data and SGLI election form (fax to the appropriate regional CAC office in the event that you are representing the command. In accordance with the Privacy Act of 1974, next of kin shall not see or be told who the beneficiaries are on the Page 2 or SGLI election form.)
- Chaplain:** Arrange for a chaplain to accompany you on the notification visit. If a chaplain is not available, arrange for another person to accompany you.
- Latest Information:** Contact the parent command to receive the latest information concerning the casualty.
- Transportation:** Secure a government vehicle.
- Directions and Map:** Obtain directions and/or a map to the home of the NOK.
- Calling Card:** Prepare several CACO calling cards.
- Uniform:** Prepare uniform for notification visit.
  - Summer: service dress whites
  - Winter: service dress blues

## Notification of Primary Next of Kin

- Time of Notification:** Notification will be made between the hours of 0500 and 2400 unless one of the following circumstances occurs:
  - Death occurred in theater during the war.
  - High media interest.
  - Otherwise directed by OPNAV N135C or regional commander.
- Media Attention:** If contacted by the media have them contact your Public Affairs Officer (PAO). If your command does not have a PAO, have them contact your immediate superior in charge (ISIC) PAO.
- In-Person Contact with NOK:** Identify and make contact in person with the NOK immediately. If notification must be made at place of employment, speak with a manager or someone in charge. Try to arrange for a private place to make the notification, and arrange to get the NOK home safely.
- Use the Following Statement:** (specific information can be read from Items Charlie and Delta on the PCR): “On behalf of the Secretary of the Navy, I regret to inform you that your (relation) died today of (list circumstances as known).”
- Casualty Details:** Provide NOK with reported circumstances of the incident.
- Location of Remains:** Inform NOK of current location of remains (PCR Item Echo). Update family daily on the location of their loved one’s remains and the anticipated transportation date.
- Dignified Transfer of Remains:** If killed in action, inform NOK of the details of the dignified transfer of remains, and obtain preferences for media coverage in accordance with DoDI 1300.18 and the Dignified Transfer of Remains Script from DCIPS. The only form that absolutely must be completed on the notification visit is the Dignified Transfer of remains paper work.

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- ❑ **Notifying Other Active-Duty Relatives:** Inform the NOK that the American Red Cross or OPNAV N135C can assist with notifying any other active-duty relatives.
  - ❑ **Letter of Circumstances:** Inform NOK that a condolence letter is forthcoming from the commanding officer and then follows up with parent command to ensure the letter is prepared and mailed to NOK within 48 hours.
  - ❑ **Investigations:** Advise NOK that investigations will be conducted as warranted, i.e., Line of Duty, JAGMAN, Aircraft Mishap or police report. Tell them that you can assist them in completing the requests for this information on a later visit and will keep them apprised of the status of any relevant investigations.
  - ❑ **Immediate Needs:** Inquire as to any immediate needs of NOK (for example emergency financial needs). Assistance can be obtained from the local Navy-Marine Corps Relief Society office and the American Red Cross.
  - ❑ **Personal Information and Forms:**
    - If appropriate, complete NAVPERS 1770/9 and 1770/8 (see below). If not appropriate, get the following information from the NOK:
      - Complete name.
      - Correct address and phone numbers.
      - If death gratuity beneficiary, get Social Security Number (death gratuity beneficiaries are indicated on the deceased member's Record of Emergency Data)
    - NAVPERS 1770/8: If appropriate, obtain the signature of the PNOK on the "Consent for the Release of Personal Information Form" (NAVPERS 1770/8) and fax it to the regional CAC office and OPNAV N135C. Reassure the NOK that if they choose not to consent to the disclosure of their information, it will not affect processing benefits and other official actions. This form only restricts the release of information to third-party organizations such as grief counseling agencies, other non governmental agencies and commercial vendors.
    - NAVPERS 1770/9: If appropriate, complete the "Primary/Secondary Next of Kin Information Form" (NAVPERS 1770/9). Ensure that all blocks are completed to include ZIP code +4 (example: 12345-6789).
  - ❑ **Death Gratuity (electronic funds transfer):** Provide death gratuity recipients with the DD 397 and EFT payment form to fill out. Get a voided check from the beneficiary's banking institution. When completed, fax/e-mail the DD 397, EFT payment form and voided check to your Regional Casualty Assistance Center and forward to OPNAV N135C after confirmation from your Regional Casualty Assistance Center.
  - ❑ **Death Gratuity (paper check only):** Follow the procedures outline in MILPERSMAN 1770-280 to assist the NOK in having the death gratuity paid by paper check.
  - ❑ **If the Casualty is an Officer:** Obtain the following information about the deceased member from the NOK:
    - Date of Birth \_\_\_\_\_
    - Place of Birth \_\_\_\_\_
    - Religion \_\_\_\_\_
    - Home of Record \_\_\_\_\_
    - Place of Entry \_\_\_\_\_
  - ❑ **Do Not Leave NOK Alone:** Before leaving the NOK, ensure that they are not alone by arranging for someone to be with them (family, friends or ombudsman) to provide continuing support and assistance.
  - ❑ **Arrange Funeral Arrangements Visit:** Before leaving, assure the NOK that you will provide continuing assistance and continued availability. Arrange for a visit with the NOK the following day to make funeral arrangements.

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- CACO Calling Card:** Leave several completed CACO calling cards with the NOK.

### Follow-Up to the Notification Visit

- Provide Information to regional CAC office (ROC if after hours):** Immediately report the following by phone
  - o Date of Notification: \_\_\_\_\_
  - o Time of Notification: \_\_\_\_\_
  - o Verified Name of NOK: \_\_\_\_\_
  - o Address and Phone of NOK: \_\_\_\_\_
  - o Accompanying Chaplain's Name (if applicable): \_\_\_\_\_
  - o Social Security number of NOK (if applicable): \_\_\_\_\_
  - o Preference for receiving death gratuity (if applicable): \_\_\_\_\_
- Provide Information to Commanding Officer of Deceased Service Member:** Call the deceased service member's commanding officer and report the date and time of notification to the NOK (PCR Item Bravo).
- MAO/DAO:** Contact the Mortuary Affairs Office or Decedent Affairs Office for a detailed breakdown of authorized mortuary benefits and guidance.
- Legal Issues:** Contact Naval Legal Services Office for guidance as needed (e.g., appointment for family for probate or guardianship issues).
  - o **Appointment Date/Time:** \_\_\_\_\_
- Advise Others:** Keep OPNAV N135C, other involved CAC offices, and any other CACOs assigned to this case informed of any issues.
- Additional Administration:** Keep accurate and up-to-date case notes in your case file.
  - o Travel Notes
    - Mileage records for travel claims
    - Official cell phone calls above normal plan
  - o Make 2 copies of all documents
    - Maintain file copy and give one to PNOK/SNOK

### Forms for the Notification Visit

- Personnel Casualty Report
- Copy of Record of Emergency Data
- Copy of SGLI Election Form
- CACO Master Information Sheet
- Primary/Secondary Next of Kin Information Form (NAVPERS 1770/9)
- Consent for the Release of Personal Information (NAVPERS 1770/8)
- Claim Certification Voucher for Death Gratuity Payment (DD 397)
- EFT Death Gratuity Payment Form
- DCIPS Notification Script Regarding Dignified Transfer of Remains at Dover Air Force Base
- Next of Kin Travel Request (NAVPERS 1770/10)

## Forms and Information for the Notification Visit available at the CACO resource webpage

Form Name	Form Number
Aircraft Mishap Investigation Request	
Autopsy Request Sample	
CACO Calling Card Template	
CACO Master Information Sheet	
Casualty Assistance Calls Program	NAVPERS 1770/7
Claim Certification and Voucher for Death Gratuity Payment	DD 397
Consent to Release Personal Information	NAVPERS 1770/8
Death Cases Involving Autopsy	
Death Gratuity	MILPERSMAN 1770-280
Death Gratuity EFT NAVADMIN	NAV 08-246
Death Gratuity EFT Payment Form	
Death Gratuity Paper Check Payment Procedures	
JAGMAN Investigation Results Request	
Sample DCIPS Script for Dignified Transfer of Remains	
NCIS Investigation Results Request	
Next of Kin Travel Request	NAVPERS 1770/10
PCR Procedures	MILPERSMAN 1770-030
Personal Effects Sample	
Personal Effects Waiver	
Policy Report Request	
Primary/Secondary Next of Kin Information	NAVPERS 1770-9
Privacy Act Authorization	
Report of Casualty	DD 1300

## Case Contact Information for Notification Visit

Contact Type	Contact Information (Name, Phone, Fax, Email, etc.)
American Red Cross	(877) 272-7337
Chaplain	
Command Information (CO, XO, CMC, etc.)	
Decedent Affairs Office	
Navy Mortuary Affairs Office	Toll Free: (866) 787-0081 After Hours Cell: (901) 619-8157
Navy Legal Services Office	
Navy-Marine Corps Relief Society	Arlington, VA Office/ Toll Free: (703) 696-4960
Other CAC Offices/ CACO Officers	
Regional CAC Office	

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## Casualty Assistance Calls Officer Funeral Arrangements Visit Checklist

- Uniform:** Service Khaki or Navy Service Uniform for E-6
- Death Gratuity (paper check only):** Deliver the death gratuity check (if not already delivered).
  - Have PNOK sign the DD-397, Claim Certification and Voucher for Death Gratuity Payment, and fax the signed copy to the regional CAC office.
- NAVPERS 1770/8:** If not completed on the first visit, obtain the signature of the PNOK on the “Consent for the Release of Personal Information Form” (NAVPERS 1770/8) and fax it to the regional CAC office and OPNAV N135C.
- NAVPERS 1770/9:** If not completed on the first visit, complete the “Primary/Secondary Next of Kin Information Form” (NAVPERS 1770/9). Ensure that all blocks are completed to include all ZIP codes +4 (example: 12345-6789).
- Location of Remains:** Continue to update family daily on location of their loved one’s remains and the anticipated transportation date.
- Funeral Allowances:** Counsel PADD on funeral options/allowances.
  - Disposition of Remains Form: Assist the Person Authorized to Direct Disposition of remains (PADD) in completing the form.
  - Fax a signed copy of the form to the regional CAC office and all other parties concerned.
- Payment of Funeral and/or Interment Expenses (DD-1375):** Obtain PADD signature for each funeral home used.
  - Fax to regional CAC office and MAO.
- Navy Escort:**
  - Inform the PNOK of the Navy escort of remains (provided by the casualty’s command. Arrangements for travel of the escort/remains will be funded by the MAO or the DAO).
- Funeral Honors:**
  - Inform the PNOK of eligibility and availability of funeral honors.
  - Arrange for funeral honors through the regional CAC office.
- Funeral/Memorial Date:** \_\_\_\_\_
  - Advise the PADD to not schedule a firm funeral date until the remains arrive at the receiving funeral home.
- Funeral/Memorial Travel Allowances:**
  - Assist with the family’s travel needs; contact OPNAV N135C for travel orders.
  - Verify with the airline that the tickets are indeed purchased and waiting.
- Funeral Attendance**
  - Advise the PNOK of your planned attendance at the funeral.
- Survivor Benefit Applications:**
  - Advise the PNOK that survivor benefit applications will be forthcoming within the next 10 working days, and that you will call and make an appointment with them to assist with the completion of the applications.

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- Advise Others:** Keep OPNAV N135C, other involved CACO offices, and any other CACOs assigned to this case informed of any issues.
  - Submit NAVPERS 1770/7** — every 30 days until case is closed.

### **Forms for the Funeral Arrangements Visit**

- Death Gratuity Check (if not already delivered) and Form DD-397
- Disposition of Remains Form (If not completed during initial visit)
- If not all remains are recovered — Disposition of Remains Election Statement — Initial Notification of Identified Partial Remains (CJMAB 1)
- Partial Remains found/identified — Disposition of Remains Election Statement — Notification of Subsequently Identified Partial Remains (CJMAB 3)
- In Theater of Combat Operations only — Election for Air Transportation of Remains from a Theater of Combat Operations (CJMAB 4)
- Request for Payment of Funeral and/or Interment Expenses (DD-1375)
- Primary/Secondary Next of Kin Information Form (NAVPERS 1770/9, if not completed on first visit)
- Consent for the Release of Personal Information (NAVPERS 1770/8, if not completed on first visit)
- Casualty Assistance Calls Program (NAVPERS Form 1770/7)

**Forms and Information for the Funeral Arrangements Visit available at the CACO resource webpage**

Form Name	Form Number
Memorial Service Travel	MILPERSMAN 1770-271
Application for Standard Government Headstone or Marker for Installation in a Private Cemetery or State Veteran’s Cemetery	VA 40-1330
<b>Buglers Manual</b>	
Burial at Sea Request Form	
Disposition of Remains Election Statement Notification of Subsequently Identified Remains	CJMAB Form 3
Disposition of Remains Election Statement/ Initial Notification of Identified Partial Remains	CJMAB Form 1
Election fo Air Transportation of Remains from a Theater of Combat Operation	CJAMB Form 4
Escort Manual	
Funeral Travel	MILPERSMAN 1770-270
<b>NAVPERS 1770/10</b>	
Hardwood Flag Case Request Form	
Instructions for DD1375	DD 1375
<b>Memorial Service Travel</b>	<b>ALNAV 045-10</b>
Military Escorts for Human Remains – April 2006	
Naval Funerals at Arlington National Cemetery	NAVPERS 15956D
Navy Military Funerals	NAVPERS 15555D
Request For Payment of Funeral and/or Interment Expenses	DD 1375
Statement of Disposition of Remains	
Travel Voucher or Subvoucher	DD1351-2

**Case Contact Information for Funeral Arrangements Visit**

Contact Type	Contact Information (Name, Phone, Fax, Email, etc.)
Navy Mortuary Affairs Office	Toll Free: (866) 787-0081 After Hours Cell: (901) 619-8157 Navy Mortician on duty 24 hours a day
Funeral Home	
Airline for Travel to Funeral	

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# Casualty Assistance Calls Officer

## Benefits Visit Checklist

- Uniform:** Service Khaki or Navy Service Uniform for E-6
- Benefits Brief**
  - Upon receipt of the benefits package (to be sent to the CACO within 10 days of receipt of the PCR), call the regional CAC office to arrange to attend a brief on assisting the PNOK in completing applications for benefits.
  - Download applicable forms as indicated in the benefits package checklist provided by OPNAV N135C prior to attending the brief.
  - Make an appointment with the PNOK for the benefits visit. Date/ Time: \_\_\_\_\_
- Privacy Act Authorization**
  - Have the PNOK sign the Privacy Act Authorization, if not already done, and attach a copy to all benefit claim forms.
- DD-1300**
  - Make copies of the DD-1300 as needed.
  - Attach a copy of the DD-1300 to all benefit claim forms.
- Housing**
  - Advise the family on housing options.
  - Family choice: \_\_\_\_\_
- Investigations**
  - Provide family with the status of any investigations, and assist with completing the FOIA request, if not done on a previous visit.
- Inventory of Personal Effects**
  - When the command Inventory Control Board completes the inventory and a DD 1300 with a Line of Accounting is received, contact the Personal Property Office to arrange for delivery.
  - Monitor status of personal effects and address inquiries to member's command. (Should be inventoried and shipped within 14 days.)
- Recordkeeping and Tracking**
  - Keep copies of all claims submitted.
    - Copy for your case file.
    - Copy for PNOK.
  - Fax a copy of all completed application forms to the regional CAC office.
  - Monitor the progress of all survivor benefit entitlements by submitting a CACO Tickler (NAVPERS 1770/7) as follows:
    - Submit "initial" NAVPERS 1770/7 to regional CACO coordinator within 30 days of the casualty:
      - Due Date \_\_\_\_\_

- Submit “interim” NAVPERS 1770/7 every 30 days:
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
- Submit “final” NAVPERS 1770/7 when all benefits/monies have been received.
- Submit DD 1164 via DTS for reimbursement of CACO expenses (for example, mileage, toll, phone calls) to the regional CAC office monthly:
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
  - Due Date \_\_\_\_\_
- CACO Change
  - If you transfer, turn your case over to another CACO and provide his or her name and phone number to the regional CAC office.

### Forms for the Benefits Visit

- Benefit Claim Forms as Directed by OPNAV N135C
- CACO Tickler (NAVPERS 1770/7)
- DD 1300, Report of Casualty
- DD 1164, Claim for Reimbursement for Expenditures on Official Business (will phase out)
- Privacy Act Authorization

### Forms and Information for the Benefits Visit available at the CACO resource webpage

Form Name	Form Number
<b>A Summary of VA Benefits Brochure</b>	
<b>A Survivors Guide to Benefits</b>	
<b>Application for Dependency and Indemnity Compensation by a Surviving Spouse or Child (DIC)</b>	<b>VA 21-534a</b>
<b>Application for Refund of Educational Contributions</b>	<b>VA 24-5281</b>
<b>Armed Forces Service Corporation Membership</b>	
<b>BAH Non Receipt Letter to DFAS</b>	
<b>Beneficiary Financial Counseling Services for SGLI VGL FSGLI Beneficiaries</b>	
<b>Beneficiary Financial Counseling Services for TSGLI Beneficiaries</b>	
<b>Claim for Death Benefits</b>	<b>SGLV 8283</b>
<b>Claim for Reimbursement for Expenditure on Official Business</b>	<b>SF 1164</b>
<b>Freedom of Information Act Request</b>	
<b>Information Relating to Deceased Participant</b>	<b>TSP-U-17</b>
<b>Inventory of Personal Effects</b>	<b>NAVSUP 29</b>
<b>MGIB Refund Letter 1</b>	
<b>MGIB Refund Letter 2</b>	

<b>Personal Effects Command CACO Designation Letter</b>	
<b>Personal Effects Extension Letter</b>	
<b>Personal Effects Shipment Request Form</b>	
<b>Post 9 11 GI Bill Frv Scholarship</b>	
<b>Presidential Memorial Certificate (PMC) Info and Instructions</b>	
<b>Presidential Memorial Certificate (PMC) Request Form</b>	<b>VA 40-0247</b>
<b>Request Pertaining to Military Records</b>	<b>SF 180</b>
<b>SGLI Accelerated Benefits Option</b>	
<b>Social Security Survivor Benefits</b>	
<b>SSA Expedited Claims Procedures</b>	
<b>Transportation of Personal Property</b>	<b>NAVSUP 490</b>
<b>Tricare Survivor Benefits Brochure</b>	
<b>VA Bereavement Counseling Fact Sheet</b>	
<b>VA Death Pension Benefits Fact Sheet</b>	
<b>VA Dependents Indemnity Compensation (DIC) Fact Sheet</b>	
<b>VA Educational Benefits Information</b>	

### Case Contact Information for Benefits Visit

Contact Type	Contact Information (Name, Phone, Fax, Email, etc.)
OPNAV N135C Benefit Claims	OPNAV N135C is available to answer questions regarding SGLI at (800) 368-3202
SGLI/OSGLI	Office of Servicemembers' Group Life Insurance (SGLI) Tel. (800) 419-1473 Main Fax. (800) 236-6142 Claims Fax. (877) 832-4943 <a href="http://www.insurance.va.gov/sglisite/sgli/sgli.htm">http://www.insurance.va.gov/sglisite/sgli/sgli.htm</a>
VA Representative/Office	