



Casualty Assistance Officer QuickGuide

What You Should Know
and Do to Fulfill Your
CAO Duties

September 2004

This QuickGuide is designed to be a companion piece to the Casualty Assistance Officer (CAO) Guide (September 2004). Together, the Guide and QuickGuide will keep you focused on what you need to know and do to successfully fulfill your CAO mission.

Other sources of information and assistance:

- Your Casualty Assistance Center (CAC) – your primary source for information and assistance
- The Army Casualty Assistance Web site: www.armycasualty.army.mil
- The Casualty and Memorial Affairs Operations Center (CMAOC), 1-800-626-3317 – for time-sensitive assistance

QuickTips

The checklists provided follow the steps in the CAO Guide. They are designed to keep you focused on your major actions during your CAO duty. Use them, and refer to the CAO Guide often.

Keep in mind that every CAO case is different; your own experiences may or may not exactly follow these steps, or occur in the same order as presented here. Be prepared to be flexible.

It is much more important that you respond to the needs of the next of kin (NOK).

One of your most important tools is your highest sense of Army professionalism and discipline.

**Step 1:
Research**

**Step 2:
Initial
Contact/
Meeting**

**Step 3:
Follow-Up
Visit(s)**

**Step 4:
Funeral/
Interment
Service**

**Step 5:
Post-
Funeral
Visits**

**Important
Documents**

**Special
Sections**

Step 1: Research

Conduct General Research

- Review Guide and Quickguide.
- Use your CAC.
- Contact other CAOs for advice.
- Review regulations.
- Read information paper, “Active Duty Death Survivor Benefit Plan (SBP) Elections.”

Conduct Specific Research

(as it applies in your case)

- Obtain information from CAC on family structure.
- Contact the Casualty Notification Officer (CNO).
- Verify current status of remains and circumstances of the death.
- Contact the Retirement Services Officer (RSO) to schedule SBP counseling.
- Obtain information on disposition of remains process.
- Obtain information on disposition of personal effects process.

- Review information on dealing with the media.
- Contact legal assistance.
- Verify posthumous citizenship eligibility.

Obtain and Review Forms/Documents

(These will be provided by the CAC)

- Review Casualty Assistance Officer After Action Report.
- Fill out Casualty Assistance Referral Card.
- Obtain multiple copies of Authorization for Disclosure of Information.
- Obtain a copy of Disposition of Remains Statement (DA Form 7302).
- Obtain a copy of Verification of Survivor Annuity (DD Form 2656-7).
- Obtain a copy of Direct Deposit Authorization (DFAS-CL Form 7330/2).
- Obtain a copy of Tax Withholding Certificate (W-4P).

Step 2: Initial Contact/Meeting

- Telephone the primary next of kin (PNOK) within 4 hours (between 0600 hours to 2200 hours) of the notification to schedule visit. Upon arrival, express condolences.
- Uniform for initial visit is Class A.

Visit should be brief to complete following actions:

- Confirm 45-day mailing and residence address (if different).
- Obtain Soldier's common name.
- Check on any special titles used by NOK.
- Advise on status of remains.
- Explain that the death gratuity entitlement is intended to cover immediate expenses.
- Discuss benefits if asked by the PNOK.
- Provide PNOK with a Casualty Assistance Referral Card.

- Determine family need for Public Affairs Office (PAO) support. (Note: In a high-profile case, it may be desirable to have the PAO accompany the CAO on the initial visit. This can be discussed when making the appointment.) Coordinate with CAC.
- Record completed actions on Casualty Assistance Officer After Action Report and Daily Staff Journal/Duty Officer's Log (DA Form 1594).

QuickTips

Your CAC is your first source of information and assistance.

During the initial meeting, be prepared for some of the family's anger to be directed toward you.

Step 3: Follow-Up Visits

Limit business to the following:

- Death gratuity.
- Preparation for funeral.
- Discussion of posthumous citizenship (if applicable).
- Answering other specific questions.
- Advise the person authorized to direct disposition of remains (PADD) on Government entitlements:
 - Preparation and disposition of remains.
 - Reimbursements for incidental burial expenses.
- Ensure completion of the Disposition of Remains Statement (DA Form 7302) (PADD only).
- Obtain completed Authorization for Disclosure of Information form.
- Advise PADD regarding use of Government cemeteries.

- Determine PADD degree of involvement in funeral arrangements.
- Coordinate military honors.
- Update information on Survivor Benefit Plan (SBP) Beneficiary Worksheet.
- Uniform can be Class B.

Step 3:
Follow-Up
Visit(s)

QuickTips

Do not become involved in the family's internal differences or disputes.

Do not guess at answers, do not speculate, do not assume facts without verification, and do not promise anything.

When you are uncertain about an answer, reply, "I don't know, but I will get an answer for you." Then get the answer.

Step 4: Funeral/Interment Service

Funeral Requirements:

- Military funeral honors entitlements.
- Military chaplain or civilian clergy?
- Coordinate with general officer (GO) attendee (if applicable).
- CAO may attend funeral as representative of the Secretary of the Army if no general officer will attend.
- Check preparations with funeral honors detail Non-Commissioned Officer In Charge (NCOIC) and monitor detail's performance.
- Coordinate with funeral honors detail/ funeral director on presentation of the flag and flag case.

QuickTips

Treat the family you are serving as you would want your family to be treated in the same situation.

Remember—every case is different. Rely on the CAO Guide and QuickGuide, but also use common sense.

It's important that you have the necessary documentation so that the NOK receives the flag and any awards.

You should be prepared to give any needed assistance at the interment location. This can include transporting family members, coordinating lodging, and handling departure arrangements.

**Step 4:
Funeral/
Interment
Service**

Step 5: Post-Funeral Visits

- Contact the PNOK two days after the funeral to schedule a visit.
- Discuss with PNOK setting up Survivor Benefit Plan (SBP) Counseling Briefing.
- Accompany PNOK to SBP Briefing with Retirement Services Officer (RSO).
- Accompany PNOK to Legal Assistance Office Visit.
- Present information on benefits and entitlements.
- Assist PNOK in filing for benefits and entitlements.
- Provide CAC with completed SBP paperwork.
- Assist PNOK in obtaining a new ID Card, if applicable.
- Assist PNOK in contacting Department of Veterans Affairs (DVA) and Social Security Administration.

- Assist in completing and submitting Request for Payment of Funeral and/or Interment Expenses (DD Form 1375).
- If PNOK desires, assist in preparing requests for official reports.
- Ensure that the PERE receives all of the Soldier's personal effects.
- If applicable, assist in coordination for the Fatal Training/Operational Accident presentation to the NOK.
- Make sure you follow up to ensure that the NOK applies for, and receives, all applicable benefits and entitlements.

Conclusion

- Once all outstanding issues have been resolved, ensure that the NOK has complete telephone numbers for the CAC and file your final Casualty Assistance Officer After Action Report.
- If the NOK is encountering problems in receiving benefits and entitlements, contact your CAC.

Important Documents

- Birth Certificates** (all family members)
- DD Form 1300** (Report of Casualty)
- Civilian Death Certificates** can be purchased through the funeral home (at least 12 certified copies are recommended)
- DD Form 2064** (Overseas Death Certificate)
- Marriage Certificate**
- Divorce decree**
- Immigration documents**
- Naturalization papers**
- Adoption and/or custody documents**
- DD Form 214** (Certificate of Release or Discharge from Active Duty)
- Social Security Number/Card**
(For all family members)

- Wills and Deeds of Trust**
- Insurance policies** (life, home, vehicles, boat, etc.)
- Income tax records** (Last 3 years recommended)
- Copies of deeds, abstract, mortgages, rental contracts, etc.**
- Documents referring to bank accounts (checking, savings), loans, securities, stocks, bonds, etc.**
- References to safe deposit boxes**
- Any reference to an outstanding debt**
- Titles, automobile registrations**

DUSTWUN (Duty Status Whereabouts Unknown)

- Review Section IV and V of Chapter 6, AR 600-8-1.
- Before the initial visit to the PNOK and/or PADD, review the section titled “Responding to the Media.”
- Provide/arrange to obtain a phone card (if CAC can support).
- Maintain a log of duties performed on Daily Staff Journal/Duty Officer’s Log (DA Form 1594).

Missing

- Review Section IV and V of Chapter 6, AR 600-8-1.
- Review Chapter 8, AR 600-8-1.
- Before the initial visit to the PNOK and/or PADD, review Appendix C, “Responding to the Media and Public Affairs.”
- Secure extra copies of “Entitlement to Pay and Allowances While in a Missing Status.”

- Maintain log of duties performed on your Daily Staff Journal or Duty Officer's Log (DA Form 1594).

Fatal Training/Operational Accident Presentations to Next of Kin

- Review AR 600-34 for a full explanation of the program.
- Present formal offer of presentation to the PNOK. Ensure that the PNOK chooses one of four options and signs the offer.
- Fax the signed offer back to CMAOC.
- Prepare a "PNOK Report" with information about the family.
- Coordinate family participation at the briefing, including attendance by clergy.
- Attend the rehearsal presentation with the briefer and Department of the Army representative, if applicable.
- Attend the presentation as liaison between the Army and family. Uniform is Class A.

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