



## **New and Improved Temporary Financial Assistance (TFA) Application**

Life just got a little easier.

In the past many of you have asked, “Why isn’t the TFA grant application a fillable PDF?” The Committee on Children & Youth is pleased to announce a new fillable TFA application. By transitioning the TFA application into a fillable PDF, applicants, investigators and departments now have greater versatility and ease in completing it.

A fillable version helps remove the guesswork of trying to decipher handwriting. Another bonus is that TFA applications and supporting documentation can truly be transmitted and maintained in a paperless fashion. This enhanced time efficiency is invaluable. When an applicant reaches out to The American Legion for help for their children, they are already distressed about their financial situation. The time it takes to manually fill out the application, photocopy documentation, and mail it in further exacerbates the situation. By creating a fillable TFA application the amount of time it takes from when an applicant requests help to when they actually receive will be shortened.

You will also see the new application requires even more information regarding the circumstances surrounding the needs of a child, thereby achieving a more thorough and accurate assessment by the investigator and approving officials.

The following updates have been added to the TFA application.

**Marital status.** It is not always clear on the application whether an applicant is single, married, divorced, separated or widowed. By including this specific question, greater clarity is achieved as to how many adults are in the home and what documentation needs to be included when submitting the TFA application packet.

**Department assistance.** Many times, TFA applicants sign up on [legion.org/join](http://legion.org/join) for American Legion membership in order to be eligible for a TFA grant. They are then placed into a department holding post. This in turn means that those applicants do not have a specific post to first reach out to for assistance. With this in mind, on page 2 titled “Other Assistance,” a “Department” section has been added. This provides documentation of any assistance by that new member’s department, since they are not a member of a specific post.

**Home visit date, time and by who.** In Resolution No. 8 on TFA policy, a home visit is required as part of the investigation process, however, that requirement was suspended earlier this year due to health and safety concerns related to the COVID-19. Since that time investigators have been conducting TFA investigations and obtaining documentation through telephonic, electronic and virtual means. Those methods of TFA investigation should continue until such time that local, state and federal mandates, as well as an investigator’s personal comfort level, allows for a return to conducting home visits.

Although home visits are not being conducted at this time, you will see that documentation of date, time and who conducted the home visit has been added to the form. This will be available when the time comes for resuming home visits. As a safety reminder, it is highly recommended that a TFA investigator never conduct a home visit alone; seek someone to accompany you for the safety and security of all involved.

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**Date of last employment for both applicant and spouse.** This will help more thoroughly substantiate a timeline of events that potentially contributed to the financial need.

**Documentation of income.** As with any request for financial assistance, a review of an applicant's financial records must be conducted to determine the amount needed in order to assist with their current financial situation. Currently, the TFA application seeks the gross income of an applicant and all working members of the household. Gross pay does not provide an accurate picture of "take home" (net) pay, as some states impose a state tax while others do not. Going forward, a TFA application must include copies of paystubs for all working members in the household from the previous 60 days. Paystubs provide greater clarity into a household's income/expense ratio so an investigator may better assess the actual financial assistance needed.

**Documentation of VA disability/pension income.** In the past, VA income was accounted for under the earnings from a job, VA pension or "other." Inputting the financial information on the correct line will provide an accurate accounting of all finances. Also, as a new function on the improved form is that the financial section will automatically total all income and expenses at the bottom of that section. This will take out the possibility of human error when doing calculations.

In addition to these new TFA application changes, the following are a few important reminders:

- It is mandatory for all items on the "Other Assistance" page to be fully complete prior to submitting an application packet to National Headquarters. Boxes on page 2 must all be filled in accordingly, and notes must document the reason for ineligibility or denial of a particular assistance, or in the case of assistance received, noting the amount and date it was received. This is crucial as documentation and verification by an investigator that an applicant has sought all other forms of assistance prior to seeking a TFA grant. And it is required by Resolution No. 8, "Restructure of Financial Assistance Statement of Policy," approved by the National Executive Committee in October 2017. Failure to fully complete page 2 will result in National Headquarters returning the application to the department for completion.

- Ensure that bills are dated less than 60 days old when submitted as part of a TFA application packet. Bills dated over 60 days will not be considered, as the current balance due may have fluctuated depending upon whether payments have been made or additional fees have been added in the interim.

- It is vital to remember that all signatures must be provided on a TFA application, as again, an incomplete application will result in its return.

**Please discontinue use of all previous versions of the TFA application form no later than Dec. 1, 2020.**

During these rather complicated times, the Committee on Children & Youth hopes you find ease in using the new streamlined TFA application form. Please do not hesitate to contact Youth Welfare Program Manager Stacy Cope at (317) 630-1323 or [Americanism@legion.org](mailto:Americanism@legion.org) should you have any questions.

It cannot be said enough – thank you for all you do to help the children of fellow veterans and military servicemembers.