

Before Taps: Planning for the End

Volunteer Training (as of Mar. 2026)



SALSA Veterans' Program



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**StMU Moody
Fellows**
4 per Semester



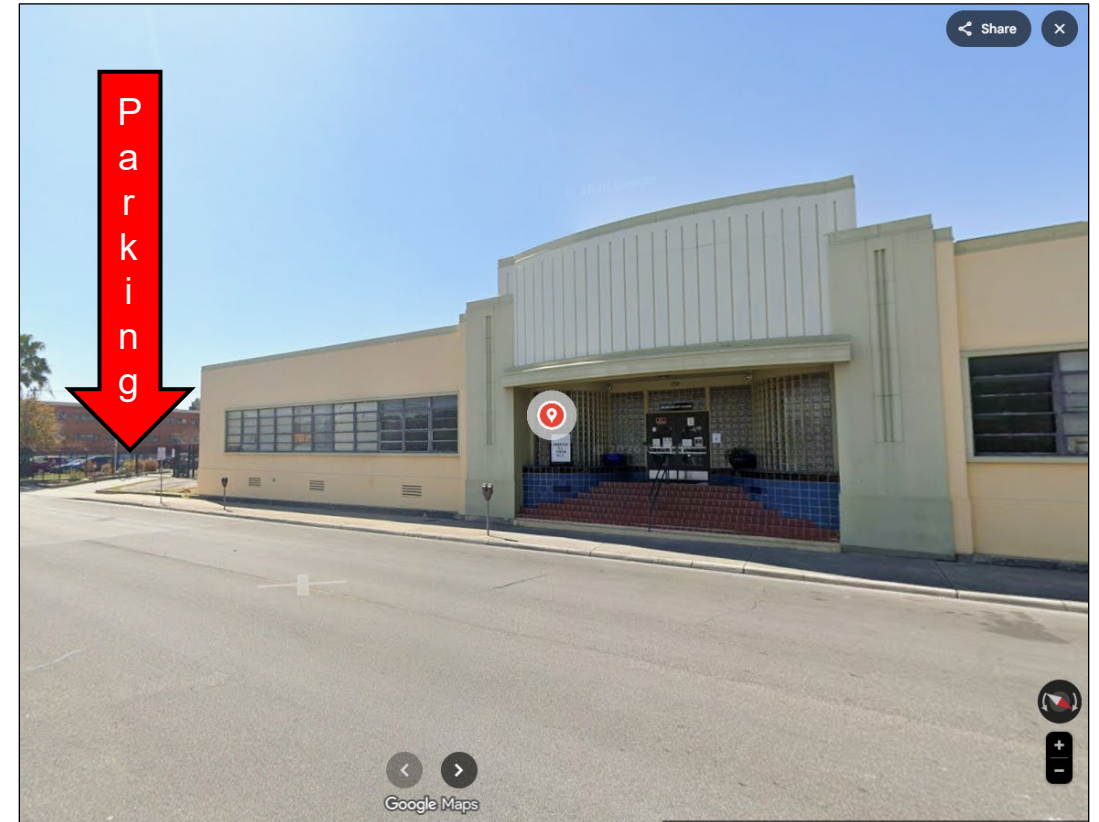
Before Taps: Overview

- Clients attending this clinic currently live in short- and long-term supportive housing at the American GI Forum.
- Clinic documents are designed to help Veterans after a medical emergency renders them incapacitated.
- Documents provided at the clinic:
 - Statutory Durable Power of Attorney
 - Medical Power of Attorney
 - Advanced Physicians Directive
 - Declaration of Guardian
 - HIPPA Release



Clinic Location

- **Location** – 519 N. Medina, San Antonio, TX 78207.
- **Parking** – gated parking lot to the south of the building, if the gate is closed use the intercom.
- **On-Site Resources** – Internet access is limited and are no print capabilities. Security and facility reps will be on-site to assist.
- **Client Population** – Facility provides both long and short-term housing for Bexar County Veterans.



Before Taps: The Process

Pre-Clinic

Step 1: Veterans are screened to ensure eligibility and service need.

Step 2: Volunteers are identified and provided training on document drafting and execution

Step 3: Clients sent clinic reminders and overview of the documents to be completed

At the Clinic

Step 4: Clients are matched with a StMU student for questionnaire verification

Step 5: Clients are then matched with a volunteer attorney who will review the documents, answer questions, and ensure capacity.

Step 6: On site Notary's will execute documents once the attorney approves them.



StMU Volunteer Responsibilities & Expectations

1. Verify information on the “*Taps Clinic Personal Data Questionnaire.*”
2. Preliminary drafting of documents.
3. General research and admin assistance for attorney volunteer during consult.
4. Act as a witness at the execution ceremonies.



Attorney Volunteer Responsibilities & Expectations

1. Verify “Legally Adequate Consent” from the Veteran for each document.
2. Explain the purpose, powers, and scope of the estate planning documents.
3. Ensure understanding by addressing any client questions or concerns with the documents.
4. Draft and execute the Representation Agreement & clinic documents.



Legally Adequate Consent

Volunteers shall ensure the following three elements are present before proceeding with document execution.

1. **Legal Capacity** – Is the client 18+ years-old? Does the client have or did they previously have a court appointed guardian?
2. **Information & Understanding** – Does the client understand the nature, purpose, consequences, risks, and benefits of the documents being executed?
3. **Voluntariness** – Has the client designated their representatives of their own free will, with no undue influence from a third party?



Estate Documents

- **Statutory Durable Power of Attorney** – Designates another to act as an agent in financial matters.
- **Medical Power of Attorney** – Designates an individual to make medical decisions in the event the principal cannot make their own decisions.
- **Directive to Physician** – Provides instructions regarding the use of life-sustaining measures in the event a terminal or irreversible condition renders the declarant incapacitated.
- **Declaration of Guardian** – Designates an individual to manage the person and estate of the declarant in the event of incapacitation.
- **HIPAA Authorization** – Designates individuals who are permitted to receive the medical information of the declarant.



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