



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 1: Determine Eligibility

Lesson 14: Determine Dependency Eligibility: Helpless Child

Trainee Guide

October 28, 2016

Version 1.0

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

Determine Dependency Eligibility: Helpless Child

Lesson Overview

Topic	Description
Time Estimate:	2 hours
Purpose of the Lesson:	This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to prepare PMC VSRs to determine if a claimant meets the eligibility requirements of a helpless child of a Veteran.
Prerequisite Training Requirements:	Prior to taking the Determine Dependency Eligibility: Helpless Child lesson, you must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1, lessons 1–13. (Refer to the Master Course Map learning aid for a list of lessons.)
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> • Master Course Map learning aid • Compensation and Pension Knowledge Management (CPKM) • 38 CFR 3.315(a) (Child Over 18 Years) • 38 CFR 3.356 (Conditions Which Determine Permanent Incapacity for Self-Support) • 38 CFR 3.57 (Child) • M21-1 III.iii.5.F (Establishing a Child's Age and Relationship) • M21-1 III.iii.5.G (Establishing a Biological Child, Adopted Child, or Step, as a Veteran's Child for Department of Veterans Affairs (VA) Purposes) • M21-1 III.iii.7 (A Child's Permanent Incapacity for Self-Support)
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**


Topic	Description
Knowledge Check:	Phase 5: Stages of a Claim, Part 1(b): Determine Basic Eligibility Knowledge Check
Lesson Objectives:	<ul style="list-style-type: none"> • Determine dependency eligibility for a helpless child of a Veteran. <ul style="list-style-type: none"> ○ Define helpless child for VA purposes. ○ Determine dependency eligibility requirements for a helpless child of a Veteran. ○ Determine whether claim is ready to rate for helpless child. ○ Determine what to develop for a helpless child of a Veteran.
What You Need:	<ul style="list-style-type: none"> • Trainee guide • Master Course Map learning aid • Dependency Eligibility Requirements job aid in the VSR assistant • Access to VBA Intranet • Access to CPKM

PowerPoint Slides	Notes
Lesson 14: Determine Dependency Eligibility: Helpless Child	


**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>You Are Here</p> <pre> graph TD P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim] P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P3 --> P4[PHASE 5 PART 4 Prepare Decision Notice] P4 --> P5[PHASE 5 PART 5 Award Adjustments] P1 --> P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim] P1a --> P1b[PHASE 5 PART 1b Basic Eligibility] P1b --> P1c[PHASE 5 PART 1c Income Eligibility] P1c --> P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] </pre>	
<p>Why It Matters!</p> <p>Determining Basic Eligibility</p> <ul style="list-style-type: none"> • Administrative Decisions • Establish Veteran Status • Determine if Veteran Meets Presumptive Criteria for Permanent and Total Disability • Determine Dependency Eligibility: Spouse • Determine Dependency Eligibility: Child • Determine Dependency Eligibility: Helpless Child • Determine Dependency Eligibility: Parent 	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**


PowerPoint Slides	Notes
<p>Ice Breaker Activity</p>  <ul style="list-style-type: none"> • What is the age of the child/children? • What is the relationship to the Veteran? • Does the form indicate that the child is helpless? • What other important information can you derive from this form? 	
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) 	
<p>Lesson Objectives</p> <p>Determine dependency eligibility for a helpless child of a Veteran.</p> <ul style="list-style-type: none"> • Define helpless child for VA purposes. • Determine dependency eligibility requirements for a helpless child of a Veteran. • Determine whether claim is ready to rate for helpless child. • Determine what to develop for a helpless child of a Veteran. 	

Lesson 14 Determine Dependency Eligibility: Helpless Child Trainee Guide

PowerPoint Slides	Notes
<p>Knowledge Check</p>	
<p>Relationship and Dependency</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Relationship: Can the individual be recognized as a Veteran's child? Yes</p> <p>Dependency: Once VA establishes that an individual is the child of a Veteran, VA assumes the child is financially dependent on the Veteran.</p>  </div>	

Relationship: Can the individual be recognized as a Veteran's child? Yes

Dependency: Once VA establishes that an individual is the child of a Veteran, VA assumes the child is financially dependent on the Veteran.




**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>What Is a Helpless Child for VA Purposes?</p> <p>A helpless child is a Veteran’s child who is permanently incapable of self-support through his/her own efforts due to physical or mental disabilities.</p>	
<p>What Is a Helpless Child for VA Purposes? Answers</p> <ul style="list-style-type: none"> • A helpless child has to be <i>rated</i> by the rating team and requires evidence to support the permanent incapacity for self-support • A helpless child must be shown to be permanently incapable of self-support by reason of mental or physical defect at the date of attaining the age of 18 years 	
<p>Age Requirement for Helpless Child</p> <p>What is the age requirement for a helpless child?</p>	
<p>Age Requirement for Helpless Child Answers</p> <p>What is the age requirement for a helpless child?</p>	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Dependency Eligibility—Helpless Child</p> <p>What are the dependency eligibility requirements for a child that also apply to a helpless child?</p>	
<p>Dependency Eligibility—Helpless Child Answers</p> <p>What are the dependency eligibility requirements for a child that also apply to a helpless child?</p>	
<p>Dependency Eligibility—Helpless Child Example</p> <p>Example: Cindy Chapps is 20 years old and her mother is applying for DIC benefits. Cindy submitted VA Form 21-534EZ to show she was the Veteran’s stepchild at the time of the Veteran’s death. On section IV of VA Form 21-534EZ, a check indicates that Cindy is seriously disabled. Evidence of record shows Cindy was already established as a dependent on the Veteran’s award at the time of his death.</p> <ul style="list-style-type: none"> • What dependency eligibility requirements for a child may apply to this helpless child example? • Where on the VA Form 21-534EZ would indicate the child is helpless? 	


**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Dependency Eligibility—Helpless Child Example Answers</p> <ul style="list-style-type: none"> • What dependency eligibility requirements for a child may apply to this helpless child example? • What item on the VA Form 21-534EZ would indicate the child is helpless? 	
<p>Dependency Eligibility—Helpless Child Demonstration</p>  <ul style="list-style-type: none"> • VA Form 21-534EZ (Application for DIC, Death Pension, and/or Accrued Benefits) section IV, item 28H, Seriously Disabled • VA Form 21-686c (Declaration of Status of Dependents) section III, item 14H, Seriously Disabled • VA Form 21p-0519C-1 (Improved Pension Eligibility Verification Report) item 1E, block 3, Disabled Child 	
<p>Dependency Check</p> <ul style="list-style-type: none"> • It is important to make sure that all the evidence regarding dependency information is included with the claim. • If evidence is missing then develop for dependency related claim information. 	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Proof of Permanent Incapacity for Self-support</p> <p>What are some example documents that may provide proof of permanent incapacity for self-support?</p>	
<p>Proof of Permanent Incapacity for Self-support Answers</p> <p>What are some documents that may provide proof of permanent incapacity for self-support?</p>	
<p>Facts Based on Personal Observation</p> <ul style="list-style-type: none"> • Statements from witnesses who have: <ul style="list-style-type: none"> ○ Knowledge of the facts ○ Observed the child's condition as of 18 • Statements must conclude with: <ul style="list-style-type: none"> ○ Name and signature of person making the statement ○ Certification: "<i>I hereby certify that the information I have given above is true and correct to the best of my knowledge and belief.</i>" 	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Facts Based on Personal Observation Answers</p> <p>Describe witnesses who could have knowledge of facts and could have observed the helpless child's condition.</p>	
<p>Evidence Examples</p> 	
<p>Is Helpless Child Information Complete?</p> <p>Example: VA received a pension application on VA Form 21-534EZ from a 40-year-old surviving child who claims he is incapable of self-support. The surviving child meets all the requirements to receive pension benefits. He submitted his birth certificate, which establishes him as the Veteran's child. The surviving child lists that he is living in an institution and submits medical evidence from his doctor, who indicates he has been incapable of self-support since he was under 18. The doctor also submits supporting medical evidence.</p> <ul style="list-style-type: none"> • Is the helpless child information complete for the type of claim requested? 	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Is Helpless Child Information Complete Answers</p> <p>Is the helpless child information complete for the claim requested?</p>	
<p>Group Activity—Practice Exercise</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three.○ Review Claim 2, 3, and 4.○ Use the Dependency Eligibility Requirements job aid to determine if the helpless child meets the dependency eligibility requirements.○ Mark your answers based on the questions asked on the checklist.○ Provide the rationale for your decisions.• Time allowed: 10–15 minutes	

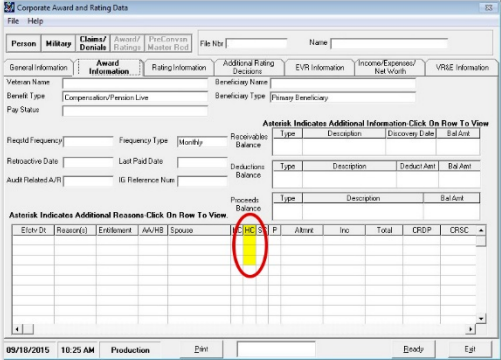
**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

Group Activity: Practice Exercise

Dependency Eligibility: Helpless Child Checklist	Yes	No
➤ <i>Is the child identified on the VA Form as disabled?</i>		
➤ <i>Is the child married?</i>		
➤ <i>Is the child the Veteran's biological, step, or adopted child?</i> If yes, list _____		
➤ <i>Has supporting evidence been provided?</i>		
➤ <i>Is the child information complete?</i>		

PowerPoint Slides	Notes																		
<p>Group Activity—Practice Exercise Answers</p> <table border="1"> <thead> <tr> <th>Dependency Eligibility: Helpless Child Checklist</th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>➤ <i>Is the child identified on the VA Form as disabled?</i></td> <td></td> <td></td> </tr> <tr> <td>➤ <i>Is the child married?</i></td> <td></td> <td></td> </tr> <tr> <td>➤ <i>Is the child the Veteran's biological, step, or adopted child?</i> If yes, list _____</td> <td></td> <td></td> </tr> <tr> <td>➤ <i>Has supporting evidence been provided?</i></td> <td></td> <td></td> </tr> <tr> <td>➤ <i>Is the child information complete?</i></td> <td></td> <td></td> </tr> </tbody> </table>	Dependency Eligibility: Helpless Child Checklist	Yes	No	➤ <i>Is the child identified on the VA Form as disabled?</i>			➤ <i>Is the child married?</i>			➤ <i>Is the child the Veteran's biological, step, or adopted child?</i> If yes, list _____			➤ <i>Has supporting evidence been provided?</i>			➤ <i>Is the child information complete?</i>			
Dependency Eligibility: Helpless Child Checklist	Yes	No																	
➤ <i>Is the child identified on the VA Form as disabled?</i>																			
➤ <i>Is the child married?</i>																			
➤ <i>Is the child the Veteran's biological, step, or adopted child?</i> If yes, list _____																			
➤ <i>Has supporting evidence been provided?</i>																			
➤ <i>Is the child information complete?</i>																			
<p>Ready to Rate for Helpless Child</p> <ul style="list-style-type: none"> • Is there evidence of prior designation of helpless child under Veteran or Survivors award? • Is the medical evidence of record sufficient for the child to be rated? • Is the claim for Veterans Pension, Survivors Pension, or DIC? 																			

Lesson 14 Determine Dependency Eligibility: Helpless Child Trainee Guide

PowerPoint Slides	Notes
<h3 style="margin: 0;">Helpless Child Prior Designation</h3> 	

Corporate Award and Rating Data X

File Help

Person
Military
Claims/ Denials
Award/ Ratings
PreConvsn Master Red
File Nbr:
Name:

General Information
Award Information
Rating Information
Additional Rating Decisions
EVR Information
Income/Expenses/ Net Worth
VR&E Information

Veteran Name:
Beneficiary Name:
 Benefit Type:
Beneficiary Type:
 Pay Status:

* Asterisk Indicates Additional Information-Click On Row To View

Type	Description	Discovery Date	Bal Amt
Receivables Balance			
Deductions Balance			
Type	Description	Deduct Amt	Bal Amt
Proceeds Balance			
Type	Description	Bal Amt	

* Asterisk Indicates Additional Reasons-Click On Row To View.



Efctv Dt	Reason(s)	Entitlement	AA/HB	Spouse	MC	HC	S	P	Altmt	Inc	Total	CRDP	CRSC

09/18/2015 10:25 AM Production Print Ready Exit

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Sufficient Medical Evidence</p> <ul style="list-style-type: none"> • What are some examples of sufficient evidence? (Hint: discussed early in lesson) • What are some examples of insufficient evidence? 	
<p>Sufficient Medical Evidence Answers</p> <ul style="list-style-type: none"> • What are some examples of sufficient evidence? (Hint: discussed early in lesson) • What are some examples of insufficient evidence? 	
<p>Sufficient Medical Evidence Missing</p> <p>If the medical evidence is missing then go to develop for missing or additional evidence.</p>	
<p>Helpless Child Veterans Pension</p> <p>A helpless child is a dependent for the purpose of determining monthly payments for the Veteran's pension award.</p>	
<p>Helpless Child Survivors Pension</p> <p>Additional allowance is payable for a child permanently incapable of self-support if the surviving spouse is receiving Survivors Pension.</p>	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
<p>Helpless Child DIC</p> <p>A helpless child will be on a separate award in his or her own right even if the surviving spouse has custody of the child and is receiving DIC benefits.</p>	
<p>Is Claim Ready to Rate?</p> <ul style="list-style-type: none"> • Is the Veteran's or Survivors Pension claim ready to rate? • Is the DIC claim ready to rate? 	
<p>Is Claim Ready to Rate? Answers</p> <ul style="list-style-type: none"> • Is the Veteran's or Survivors Pension claim ready to rate? • Is the DIC claim ready to rate? 	
<p>Ready to Rate Demonstration</p> 	
<p>Questions?</p> 	
<p>Lesson Summary</p> <ul style="list-style-type: none"> • How is helpless child dependency determined? • What are the eligibility requirements for a helpless child? • How do you determine if the helpless child claim is ready to rate? 	

**Lesson 14 Determine Dependency Eligibility: Helpless Child
Trainee Guide**

PowerPoint Slides	Notes
What's Next Phase 5 Part 1, Lesson 15: Establish Parental Relationship for DIC	