



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

Lesson Plan

October 28, 2016

Version 1.0

Lesson 14: Determine Dependency Eligibility: Helpless Child
Lesson Plan

Determine Dependency Eligibility: Helpless Child

Lesson Overview

| Topic | Description |
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| 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, trainees 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) • Dependency Eligibility Requirements job aid |
| Technical Competencies: | <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) |

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| Topic | Description |
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| Knowledge Check: | Phase 5: Stages of a Claim, Part 1(b): Determine Basic Eligibility Knowledge Check |
| Lesson Objectives: | <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. |

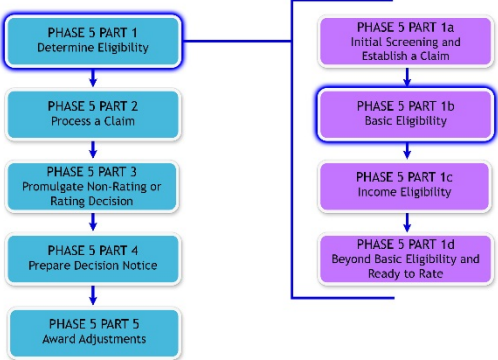

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| Topic | Description |
|----------------|--|
| What You Need: | <ul style="list-style-type: none"> • Lesson Plan • Master Course Map learning aid • Slides • Projector • Access to VBA Intranet • Access to CPKM • Access to Dependency Eligibility Requirements job aid from VSR Assistant. • Examples of the following blank VA Forms: <ul style="list-style-type: none"> ○ VA Form 21-534 (Application for Dependency and Indemnity Compensation, Death Pension and Accrued Benefits by Surviving Spouse or Child) Section V ○ VA Form 21-534EZ (Application for DIC, Death Pension, and/or Accrued Benefits) Section IV ○ VA Form 21-686c (Declaration of Status of Dependents) ○ VA Form 21p-0519C-1 (Improved Pension Eligibility Verification Report) • Claim 1 (pmc_vsr_case_2) Example of completed VA Form 21-534EZ used for Determine Dependency Eligibility: Child lesson ice breaker activity. Form should include a helpless child. • Claim 2 (pmc_vsr_case_4) where children were either included in an original application or the claimant is adding a child to a running award. • Claim 3 (pmc_vsr_excerpt_n) where children were either included in an original application or the claimant is adding a child to a running award. • Claim 4 (pmc_vsr_excerpt_o) where children were either included in an original application or the claimant is adding a child to a running award. |


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Instructor Notes




This lesson provides trainees with the information and references to be able to determine dependency eligibility for a helpless child of a Veteran.

| PowerPoint Slides | Instructor Activities |
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| <p>Lesson 14: Determine Dependency Eligibility: Helpless Child</p> | <p>DISPLAY slide</p> <p>1. "Lesson 14: Determine Dependency Eligibility: Helpless child"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p> |
| <p>You Are Here</p>  | <p>DISPLAY slide</p> <p>2. "You Are Here"</p>  <p>REFER to the Master Course Map learning aid in the Trainee Guide.</p> <p>INFORM trainees that Phase 5 Part 1 Determine Eligibility contains four subparts. Subpart 1b contains several lessons that focus on determining basic eligibility.</p> |

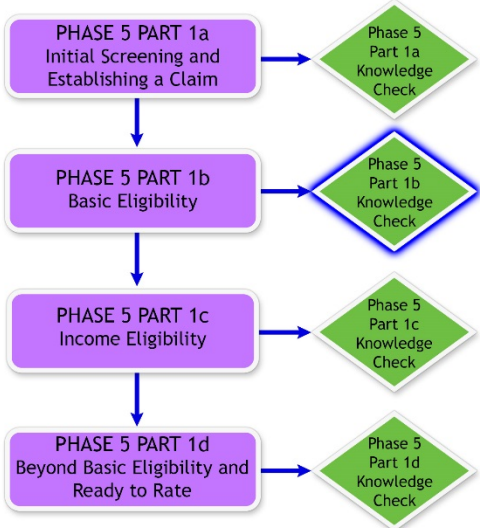

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| PowerPoint Slides | Instructor Activities |
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| <p>Why It Matters!</p> <p>Determining Basic Eligibility</p> <ul style="list-style-type: none"> • Administrative Decisions • Establish Veteran Status • Determine if Veteran Meets Presumptive Criteria for Permanent and Total Disability • Determine Dependency Eligibility: Spouse • Determine Dependency Eligibility: Child • Determine Dependency Eligibility: Helpless Child • Establish Parental Relationship for DIC | <p>DISPLAY slide</p> <p>3. "Why It Matters!"</p> <p>INFORM trainees that this lesson will focus on determining dependency eligibility for a helpless child of a Veteran.</p> <p>REMINDE trainees that they have already learned how to determine basic eligibility by:</p> <ul style="list-style-type: none"> • Establishing Veteran status • Determining if the Veteran meets presumptive criteria for permanent and total disability • Determining dependency eligibility for the spouse of a Veteran • Determining dependency eligibility for the child of a Veteran <p style="text-align: center;"></p> <p>ASK why is determining dependency eligibility for a helpless child important?</p> <ul style="list-style-type: none"> • <i>For Veterans Pension, the Veteran is eligible to receive additional benefits based on having a helpless child dependent.</i> • <i>For survivors benefits (Pension or DIC), the helpless child is eligible to receive benefits based on an established relationship to the deceased Veteran.</i> |



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| PowerPoint Slides | Instructor Activities |
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| <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>DISPLAY slide 4. "Ice Breaker Activity"</p>  <p>DEMONSTRATE what a dependent claim looks like by using Claim 1.</p> <p>REMINDE the trainees that this VA Form 21-534EZ was used to determine the eligibility of the Veteran's children in the previous lesson.</p> <p>NAVIGATE to Section V of the form and explain that this section provides the claimant's dependent child information.</p> <p>DISCUSS with trainees the dependent child information. Use the following questions to guide your discussion. Answers are provided by the instructor based on the example case.</p> <ul style="list-style-type: none"> • What is the age of the child? • 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>REFER to the Dependency Eligibility Requirements job aid in the VSR Assistant. Have them locate the child sections. Tell them that they will be referring to this job aid throughout the lesson.</p> |

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| PowerPoint Slides | Instructor Activities |
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| <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>DISPLAY slide</p> <p>5. "Technical Competencies"</p> <p>EXPLAIN that this lesson prepares them for the program benefits and eligibility, processing claims, and VBA applications competencies.</p> |
| <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. | <p>DISPLAY slide</p> <p>6. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p> |
| <p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B{Phase 5 Part 1a Knowledge Check} B --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} D --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} F --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} </pre> | <p>DISPLAY slide</p> <p>7. "Knowledge Check"</p> <p>INFORM trainees that they will be assessed on this content in the Phase 5: Stages of a Claim, Part 1(b): Determine Basic Eligibility Knowledge Check. The Knowledge Check will be given after Phase 5, Part 1, Lesson 15.</p>  <p>REFER to the Master Course Map learning aid, <i>Lessons by Phase</i> section, to review the lessons included within the Knowledge Check.</p> |


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| PowerPoint Slides | Instructor Activities |
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| <p>Relationship and Dependency</p> <div data-bbox="175 363 626 562"><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> | <p>DISPLAY slide</p> <p>8. "Relationship and Dependency"</p> <p>REMIND trainees that they learned in the Determine Dependency Eligibility: Child lesson about dependency and relationship for VA purposes.</p> <div data-bbox="716 569 816 667"></div> <p>ASK the following questions:</p> <p>What is <i>dependency</i> for VA purposes?</p> <ul style="list-style-type: none">• <i>Dependency refers to whether or not an individual is financially "dependent" on a Veteran.</i> <p>What is <i>relationship</i> for VA purposes?</p> <ul style="list-style-type: none">• <i>Relationship refers to the an individual's legal relationship status with respect to the Veteran</i> <p>DISCUSS the link between <i>relationship</i> and <i>dependency</i> in terms of a Veteran's helpless child. Using the following to guide your discussion:</p> <ul style="list-style-type: none">• Relationship—Can the individual be recognized by VA as the Veteran's child?• Dependency—If VA establishes that an individual is the child of a Veteran, VA assumes the child is financially <i>dependent</i> on the Veteran. |

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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.





| PowerPoint Slides | Instructor Activities |
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| <p>What Is a Helpless Child for VA Purposes? (1 of 2)</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>DISPLAY slide</p> <p>9. "What Is a Helpless Child for VA Purposes? (1 of 2)"</p>  <p>ASK what is a helpless child for VA purposes?</p>  <p>REFER to view 38 CFR 3.57 (Child). Have one of them read paragraph (3) aloud.</p> <p>EXPLAIN that 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> |


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| <p>What Is a Helpless Child for VA Purposes? (2 of 2)</p> <ul style="list-style-type: none">• A helpless child has to be rated 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>DISPLAY slide</p> <p>10. "What Is a Helpless Child for VA Purposes? (2 of 2)"</p>  <p>REFER to view 38 CFR 3.356 (Conditions Which Determine Permanent Incapacity for Self-Support). Have a trainee read the first paragraph aloud.</p>  <p>EMPHASIZE that a helpless child has to be rated by the rating team and requires evidence to support the permanent incapacity for self-support.</p> <p>NOTE to instructor: the first part of this lesson will highlight the dependency eligibility requirements of a child that also apply to the helpless child. The second part will focus on the specific dependency requirements of a helpless child.</p> |

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| <p>Age Requirement for Helpless Child</p> <p>What is the age requirement for a helpless child?</p> | <p>DISPLAY slide 11. "Age Requirement for Helpless Child"</p>  <p>REFER to view M21-1 III.iii.5.F.1.b. (Age Requirement for a Child). Have a trainee read the first paragraph aloud.</p> <p>REMIND trainees that they learned about the age requirement for a <i>child</i> in the child dependency lesson.</p> <p>SELECT one of the trainees to answer the following question:</p> <ul style="list-style-type: none"> • What is the age requirement for a <i>helpless</i> child? |
| <p>Age Requirement for Helpless Child Answers</p> <p>What is the age requirement for a helpless child?</p> <ul style="list-style-type: none"> • <i>The helpless child is only relevant for a child who is over the age of 18.</i> | <p>DISPLAY slide 12. "Age Requirement for Helpless Child Answers"</p> <p>PROVIDE answer:</p> <ul style="list-style-type: none"> • <i>The helpless child is only relevant for a child who is over the age of 18.</i>  <p>REFER to view 38 CFR 3.315(a) (Child Over 18 Years). Have one of them read the reference aloud.</p> |



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| <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>DISPLAY slide 13. “Dependency Eligibility—Helpless Child”</p> <p>EXPLAIN to trainees that other child dependency eligibility requirements also apply to the helpless child.</p> <div style="text-align: center;">  </div> <p>REFER to the Dependency Eligibility Requirements job aid and have trainees locate the <i>child</i> category.</p> <p>SELECT one or more of the trainees to provide answer to the following question:</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> <ul style="list-style-type: none"> • <i>Cannot be married</i> • <i>Relationship established: biological, adopted, or stepchild</i> | <p>DISPLAY slide 14. “Dependency Eligibility—Helpless Child Answers”</p> <p>PROVIDE answers:</p> <ul style="list-style-type: none"> • <i>Cannot be married</i> • <i>Relationship established: biological, adopted, or stepchild</i> |

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| <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? | <p>DISPLAY slide</p> <p>15. “Dependency Eligibility—Helpless Child Example ”</p> <p>DISCUSS the dependency eligibility for a helpless child. Use the example and questions to guide your discussion.</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? |


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| <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? <ul style="list-style-type: none"> ○ <i>The child is not married.</i> ○ <i>The child is over 18.</i> ○ <i>The relationship to the Veteran has been established—she is the Veteran’s stepchild.</i> • What item on the VA Form 21-534EZ would indicate the child is helpless? <ul style="list-style-type: none"> ○ <i>Section IV, item 28H.</i> | <p>DISPLAY slide 16. “Dependency Eligibility—Helpless Child Example Answers”</p> <p>PROVIDE answers:</p> <ul style="list-style-type: none"> • What dependency eligibility requirements for a child may apply to this helpless child example? <ul style="list-style-type: none"> ○ <i>The child is not married.</i> ○ <i>The child is over 18.</i> ○ <i>The relationship to the Veteran has been established—she is the Veteran’s stepchild.</i> • What item on the VA Form 21-534EZ would indicate the child is helpless? <ul style="list-style-type: none"> ○ <i>Section IV, item 28H.</i> |
| <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>DISPLAY slide 17. “Dependency Eligibility—Helpless Child Demonstration”</p>  <p>DEMONSTRATE on the various VA Forms where the helpless child will be indicated.</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 |

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| <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. | <p>DISPLAY slide 18. "Dependency Check"</p> <p>NOTE to instructor: the dependency information is one part of the supporting evidence needed for a helpless child.</p> <p>EXPLAIN to trainees that before moving on to the specific requirements for a helpless child, it is important to make sure that all the evidence regarding dependency information is included with the claim.</p> <p>SELECT one or more of the trainees to provide examples of supporting evidence for dependency information used for helpless child. The following are examples that could be used:</p> <ul style="list-style-type: none"> • <i>A decree of adoption or adoptive placement agreement</i> • <i>Evidence that the stepchild was a member of the Veteran's household at time of Veteran's death</i> <p>DISCUSS the importance of having supporting evidence to ensure that all the dependency information is complete.</p> <p>REMINDE that if evidence is missing then go to develop for dependency related claim information.</p> <p>NOTE to instructor: notify trainees that the actual developing for dependency related claim information will be discussed later in the course.</p> |


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| <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>DISPLAY slide 19. "Proof of Permanent Incapacity for Self-support "</p> <p>NOTE to instructor: this slide is the transition point from child dependency requirements to specific helpless child requirements.</p> <p>EXPLAIN that in addition to establishing dependency on the Veteran, there has to be proof that the helpless child is permanently incapable of self-support.</p> <p>SELECT one trainee to define what permanently incapable of self-support means in his or her own words.</p> <div style="text-align: center;">  </div> <p>REFER to CPKM to view M21-1 III.iii.7.1.b. (Information Necessary to Establish the Extent of the Disability). Have a trainee read the first paragraph aloud.</p> <p>DISCUSS the information necessary to establish the extent of disability. Lead the discussion with the following question:</p> <ul style="list-style-type: none"> • What are some documents that may provide proof of permanent incapacity for self-support? <ul style="list-style-type: none"> ○ <i>Medical or psychiatric examination reports showing:</i> <ul style="list-style-type: none"> ▪ <i>Dates of onset, extent of child's disability, and diagnosis</i> ▪ <i>Prognosis to include a description of the present condition</i> ○ <i>Vocational or educational assessment reports</i> ○ <i>A summary of employment history</i> |




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| <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> <ul style="list-style-type: none"> • Medical or psychiatric examination reports showing: <ul style="list-style-type: none"> ○ Dates of onset ○ Extent of child’s disability ○ Diagnosis ○ Prognosis to include a description of the present condition • Vocational or educational assessment reports • A summary of employment history | <p>DISPLAY slide 20. “Proof of Permanent Incapacity for Self-support Answers”</p> <p>PROVIDE answers.</p> <p>What are some documents that may provide proof of permanent incapacity for self-support?</p> <ul style="list-style-type: none"> • Medical or psychiatric examination reports showing: <ul style="list-style-type: none"> ○ Dates of onset ○ Extent of child’s disability ○ Diagnosis ○ Prognosis to include a description of the present condition • Vocational or educational assessment reports • A summary of employment history |

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| <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> | <p>DISPLAY slide 21. "Facts Based on Personal Observation "</p> <p>EXPLAIN that in addition to having medical or school records as proof of disability, the statements from witnesses can also be used to provide the helpless child's current condition.</p> <div style="text-align: center;">  </div> <p>REFER to CPKM to view M21-1 III.iii.7.1.c. (Reporting Facts Based on Personal Observation). Have a trainee read the first paragraph aloud.</p> <p>SELECT one or more of the trainees to describe witnesses who could have knowledge of facts and could have observed the helpless child's condition.</p> |


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| <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> <ul style="list-style-type: none"> • <i>Teachers</i> • <i>Specialists</i> • <i>Social workers</i> • <i>Physicians</i> • <i>Institutions where the child may have been maintained</i> | <p>DISPLAY slide 22. "Facts Based on Personal Observation Answers"</p> <p>PROVIDE answers:</p> <p>Describe witnesses who could have knowledge of facts and could have observed the helpless child's condition.</p> <ul style="list-style-type: none"> ○ <i>Teachers</i> ○ <i>Specialists</i> ○ <i>Social workers</i> ○ <i>Physicians</i> ○ <i>Institutions where the child may have been maintained</i> <p></p> <p>EMPHASIZE that all statements should indicate the basis of the knowledge of the facts reported and should include the name, signature, and certification of the person making the statement.</p> |
| <p>Evidence Examples</p> <p></p> | <p>DISPLAY slide 23. "Evidence Examples"</p> <p></p> <p>DEMONSTRATE examples that would be used as evidence for information necessary to establish extent of disability. Use Claim 1 for demonstration.</p> |

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| <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> <p>Is the helpless child information complete for the type of claim requested?</p> | <p>DISPLAY slide 24. "Is Helpless Child Information Complete?"</p> <p>DIRECT the trainees to read the example and answer the questions.</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> <p>Is the helpless child information complete for the type of claim requested?</p> |
| <p>Is Helpless Child Information Complete Answers</p> <p>Is the helpless child information complete for the claim requested?</p> <ul style="list-style-type: none"> • <i>Yes, the helpless child can be established as a dependent on his own right and the application would be submitted with the medical evidence to the RVSR to prepare a rating decision.</i> | <p>DISPLAY slide 25. "Is Helpless Child Information Complete Answers"</p> <p>PROVIDE answer to example:</p> <ul style="list-style-type: none"> • Is the helpless child information complete for the claim requested? <ul style="list-style-type: none"> ◦ <i>Yes, the helpless child can be established as a dependent on his own right and the application would be submitted with the medical evidence to the RVSR to prepare a rating decision.</i> |

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| PowerPoint Slides | Instructor Activities |
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| <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 | <p>DISPLAY slide 26. “Group Activity—Practice Exercise”</p> <p>DIVIDE class into groups of three.</p> <p>REFER trainees to Claim 2, 3, and 4 created for this practice exercise. Explain that Group 1 will review Claim 1, Group 2 will review Claim 2, and Group 3 will review Claim 3.</p> <p>TELL them that each group will answer questions based on the checklist. They should provide the rationale for their decision.</p>  <p>REFER to the Group Activity: Practice Exercise of the trainee guide. This is where the checklist is located.</p> <p>DIRECT trainees to consult with their team members and use the Dependency Eligibility Requirements job aid to determine if the helpless child meets the dependency eligibility requirements.</p> <p>GIVE the groups 10–15 minutes to complete the practice exercise.</p> |

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> | | |

**Lesson 14: Determine Dependency Eligibility: Helpless Child
Lesson Plan**

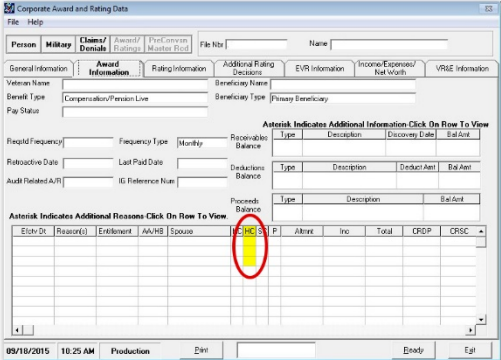

| Dependency Eligibility: Helpless Child Checklist | Yes | No |
|--|-----|----|
| ➤ <i>Is the child information complete?</i> | | |

| PowerPoint Slides | Instructor Activities | | | | | | | | | | | | | | | | | | |
|--|--|-----|----|--|--|--|--------------------------------|--|--|---|--|--|---|--|--|---|--|--|---|
| <p>Group Activity—Practice Exercise Answers</p> <table border="1"> <thead> <tr> <th style="background-color: #ADD8E6;">Dependency Eligibility: Helpless Child Checklist</th> <th style="background-color: #ADD8E6;">Yes</th> <th style="background-color: #ADD8E6;">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> | | | <p>DISPLAY slide 27. "Group Activity—Practice Exercise Answers"</p> <p>PROVIDE the answers to the checklist for the claim materials you provided.</p> <p>DISCUSS the answers for each claim with the trainees. Use the answers provided for the rationale to guide your discussions.</p> <p align="center"></p> <p>ASK if they have any questions or concerns regarding the dependency eligibility for a helpless child.</p> |
| 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> | | | | | | | | | | | | | | | | | | | |

Lesson 14: Determine Dependency Eligibility: Helpless Child
Lesson Plan

| PowerPoint Slides | Instructor Activities |
|---|---|
| <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? | <p>DISPLAY slide 28. "Ready to Rate for Helpless Child"</p> <p>EXPLAIN that the evidence they evaluated for dependency eligibility will be used as a preliminary review for determining if the evidence meets the minimum criteria for the RVSR to rate.</p> <div style="text-align: center;">  </div> <p>REFER to CPKM to view M21-1 III.iii.7.2.b (Considerations of the Rating Activity in Any Claim for Permanent Incapacity for Self-Support). Have a trainee read the first two sentences aloud.</p> <p>DISCUSS how to determine the claim is ready to rate for helpless child. Use the following questions to guide your discussion.</p> <p>NOTE to instructor: these questions will be answered in separate slides.</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 Lesson Plan

| PowerPoint Slides | Instructor Activities |
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| <p>Helpless Child Prior Designation</p>  | <p>DISPLAY slide 29. "Helpless Child Prior Designation"</p> <p>ASK, "has the helpless child been previously designated on the Veteran or Survivors award?"</p> <div style="text-align: center; margin: 10px 0;">  </div> <p>DEMONSTRATE how to determine if there is prior designation of helpless child under the Veteran or Survivors award using SHARE.</p> <ul style="list-style-type: none"> Access the Corporate tab within SHARE. Select the Awards tab. Identify the column that indicates whether the child has previously been deemed Helpless— HC. Access the prior rating decision (in SHARE, VVA, or VBMS) to identify which child was deemed helpless. |

Lesson 14: Determine Dependency Eligibility: Helpless Child Lesson Plan

Corporate Award and Rating Data

File Help

Person Military Claims/Denials Award/Ratings PreConvsn Master Rcd 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: Beneficiary Type: Primary Beneficiary

Benefit Type: Compensation/Pension Live

Pay Status:

Reqstd Frequency: Frequency Type: Monthly Receivables Balance: Type Description Discovery Date Bal Amt

Retroactive Date: Last Paid Date: Deductions Balance: Type Description Deduct Amt Bal Amt


Audit Related A/R: IG Reference Num: Proceeds Balance: Type Description Bal Amt

Asterisk Indicates Additional Information-Click On Row To View

Asterisk Indicates Additional Reasons-Click On Row To View.

| Efctv Dt | Reason(s) | Entitlement | AA/HB | Spouse | M | C | HC | S | P | Altmnt | Inc | Total | CRDP | CRSC |
|----------|-----------|-------------|-------|--------|---|---|----|---|---|--------|-----|-------|------|------|
| | | | | | | | | | | | | | | |




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| PowerPoint Slides | Instructor Activities |
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| <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>DISPLAY slide 30. "Sufficient Medical Evidence"</p> <p></p> <p>ASK is the medical evidence of record sufficient for the child to be rated?</p> <p>DISCUSS the evidence necessary to establish the extent of the disability. Use your personal experience and questions to guide your discussion.</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? |





Lesson 14: Determine Dependency Eligibility: Helpless Child
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| PowerPoint Slides | Instructor Activities |
|---|--|
| <p>Sufficient Medical Evidence Answers</p> <ul style="list-style-type: none"> • What are some examples of sufficient evidence? (Hint: discussed early in lesson) <ul style="list-style-type: none"> ○ <i>Medical or psychiatric examination reports</i> ○ <i>Vocational or educational assessment reports</i> ○ <i>Employment records</i> ○ <i>Statements for persons having knowledge of facts and who have observed the child's current condition</i> • What are some examples of insufficient evidence? <ul style="list-style-type: none"> ○ <i>2680—no diagnosis code</i> ○ <i>Physician failed to sign the exam</i> ○ <i>No medical evidence</i> | <p>DISPLAY slide 31. "Sufficient Medical Evidence Answers"</p> <p>PROVIDE answers to discussion questions:</p> <ul style="list-style-type: none"> • What are some examples of sufficient evidence? (Hint: discussed early in lesson) <ul style="list-style-type: none"> ○ <i>Medical or psychiatric examination reports</i> ○ <i>Vocational or educational assessment reports</i> ○ <i>Employment records</i> ○ <i>Statements for persons having knowledge of facts and who have observed the child's current condition</i> • What are some examples of insufficient evidence? <ul style="list-style-type: none"> ○ <i>2680—no diagnosis code</i> ○ <i>Physician failed to sign the exam</i> ○ <i>No medical evidence</i> |

Lesson 14: Determine Dependency Eligibility: Helpless Child
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| PowerPoint Slides | Instructor Activities |
|---|---|
| <p>Sufficient Medical Evidence Missing</p> <p>If the medical evidence is missing then go to develop for missing or additional evidence.</p> | <p>DISPLAY slide 32. "Sufficient Medical Evidence Missing"</p> <p>TELL trainees that when reviewing a claim for evidence, they may want to consult with an RVSR to determine what evidence is appropriate for the claim.</p> <p align="center"></p> <p>EMPHASIZE that if the medical evidence is missing then go to develop for missing or additional evidence.</p> <p>NOTE to instructor: notify trainees that the actual developing for missing or additional evidence will be discussed later in the course.</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>DISPLAY slide 33. "Helpless Child Veterans Pension"</p> <p align="center"></p> <p>REFER to CPKM and navigate to M21-1 III.iii.7.3.b. (Veterans Pension). Have a trainee read the reference aloud.</p> <p>SELECT one of the trainees to summarize what the reference means in his or her own words.</p> <p align="center"></p> <p>EMPHASIZE that a helpless child is a dependent for the purpose of determining monthly payments for the Veteran's pension award.</p> |





Lesson 14: Determine Dependency Eligibility: Helpless Child
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| <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> | <p>DISPLAY slide 34. "Helpless Child Survivors Pension"</p>  <p>REFER to CPKM and navigate to M21-1 III.iii.7.3.c. (Survivors Pension). Have one of them read the reference aloud.</p> <p>DIRECT one of the trainees to summarize what the reference means in his or her own words.</p>  <p>EMPHASIZE that an additional allowance is payable for a child permanently incapable of self-support if the surviving spouse is receiving Survivors Pension.</p> |
| <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>DISPLAY slide 35. "Helpless Child DIC"</p>  <p>REFER to CPKM and navigate to M21-1 III.iii.7.3.d. (DIC). Have one of them read the reference aloud.</p> <p>SELECT one or more of the trainees to summarize the reference in his or her own words.</p>  <p>EMPHASIZE that a helpless child will be on a separate DIC award in his or her own right even if the surviving spouse has custody of the child and is receiving DIC benefits.</p> |

Lesson 14: Determine Dependency Eligibility: Helpless Child
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|---|--|
| <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>DISPLAY slide 36. “Is Claim Ready to Rate?”</p> <p>DISCUSS how to handle a DIC, Veterans Pension, or Survivors Pension claim that is ready to send to the rating team for a rating of helpless child. Use the following questions to guide your discussion.</p> <ul style="list-style-type: none"> • Is the Veteran’s or Survivors Pension claim ready to rate? • Does a 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? <ul style="list-style-type: none"> ○ <i>If there is evidence of prior designation of helpless child under Veteran or Surviving Pension award, then it does not need to get rated.</i> ○ <i>If the medical evidence is sufficient then Veteran or Survivors Pension is ready to rate.</i> • Is the DIC claim ready to rate? <ul style="list-style-type: none"> ○ <i>If the claim is DIC and there is evidence of prior designation then it must go to the RVSR to be rated.</i> ○ <i>If the medical evidence is sufficient then Veteran or Survivors Pension is ready to rate.</i> | <p>DISPLAY slide 37. “Is Claim Ready to Rate? Answers”</p> <p>PROVIDE answers to discussion questions:</p> <ul style="list-style-type: none"> • Is the Veteran’s or Survivors Pension claim ready to rate? <ul style="list-style-type: none"> ○ <i>If there is evidence of prior designation of helpless child under Veteran or Surviving Pension award, then it does not need to get rated.</i> ○ <i>If the medical evidence is sufficient then Veteran or Survivors Pension is ready to rate.</i> • Is the DIC claim ready to rate? <ul style="list-style-type: none"> ○ <i>If the claim is DIC and there is evidence of prior designation then it must go to the RVSR to be rated.</i> ○ <i>If the medical evidence is sufficient then Veteran or Survivors Pension is ready to rate.</i> |

Lesson 14: Determine Dependency Eligibility: Helpless Child
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| <p>Ready to Rate Demonstration</p>  | <p>DISPLAY slide 38. "Ready to Rate Demonstration"</p>  <p>DEMONSTRATE how to determine if the claim is ready to rate for a helpless child.</p> <p>USE the examples used for the group activity: practice exercise.</p> <p>SHOW in VBMS to access the example and determine if the claim is ready to rate.</p> |
| <p>Questions?</p>  | <p>DISPLAY slide 39. "Questions"</p>  <p>ASK if they have any questions or concerns regarding the dependency eligibility for a helpless child. Use this time to clear up any confusion or misconceptions about the information presented.</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? | <p>DISPLAY slide 40. "Lesson Summary"</p> <p>REVIEW the key points of the lesson with a guided discussion using the following questions:</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? |
| <p>What's Next</p> <p>Phase 5 Part 1, Lesson 15: Establish Parental Relationship for DIC</p> | <p>DISPLAY slide 41. "What's Next"</p> <p>DISCUSS the upcoming Phase 5, Part 1, Lesson 15: Establish Parental Relationship for DIC.</p> |

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