Pension and fiduciary service

PMC VSR Advanced Core Course Phase 5, Part 1(c): Income Eligibility

Phase 5, Part 1(c) Knowledge Check Preparation

Appendix B: Worksheet

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Version 1.0

Phase 5, Part 1(c) Worksheet

Part A: What’s the Date?

Using Example Claim 1 in Appendix A, determine the period for establishing entitlement. Refer to the **Initial Year** job aid for assistance.

1. Based on all the information provided in the example claim, what is the entitlement date/effective date for the claim? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Now that you have established the effective date. The payment date of May 1, 2015 has been determined. Provide the dates for the following periods:
   * Beginning of “A” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of “A” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Beginning of first full calendar year \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Beginning of overlap period or “B” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Endo of overlap period or “B” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of initial year \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Beginning of “C” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of first full calendar year \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of second 12 months (not shown on diagram)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Part B: Income and Expenses

Use Example Claim 1 in Appendix A, and the following job aids, to assist in answering the questions:

* **Income and Net Worth Status** job aid
* **Income Classification and Counting Table** job aid
* **Countable Income** job aid
* **Care Expense Guide** job aid

1. List the countable income and classification in the table:

Countable Income

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Recipient | Amount | Classification |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |

1. List the medical expenses in the table:

**Medical Expenses**

| **Description** | **Amount Paid** | **Date Paid** | **Provider** | **Paid For** |
| --- | --- | --- | --- | --- |
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Part C: Net Worth Status

Use Example Claim 2 in Appendix C to determine if net worth is a bar to benefits. Refer to the **Income and Net Worth Status** job aid for more information.

1. Use the documents in Example Claim 2 to complete the following fields found on VA Form 21-5427, Corpus of Estate Determination:
   1. Total Amount of Estate \_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Total Income \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Total Expenses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Do the monthly expenses exceed the claimant’s income? If so, by how much monthly?
3. Based on all the evidence provided in Example Claim 2, is net worth a bar to benefits?