



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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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 _____
 - End 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) _____

Appendix B: Worksheet

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

2. List the medical expenses in the table:

Medical Expenses

Description	Amount Paid	Date Paid	Provider	Paid For

Appendix B: Worksheet

Description	Amount Paid	Date Paid	Provider	Paid For

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:
 - a. Total Amount of Estate _____
 - b. Total Income _____
 - c. 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?