



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5, Part 1(d): Beyond Basic
Eligibility and Ready to Rate

Phase 5, Part 1(d) Knowledge Check Preparation

Trainee Guide

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Version 1.0

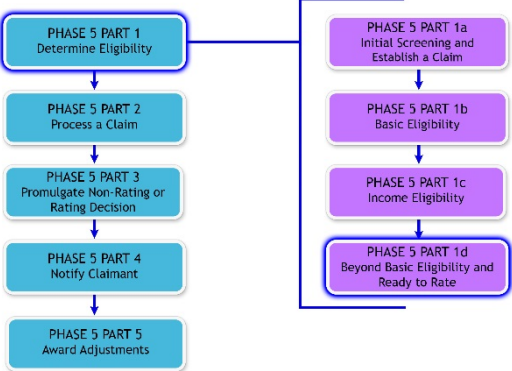
**Phase 5, Part 1(d) Knowledge Check Preparation
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Phase 5, Part 1(d) Knowledge Check Preparation

Lesson Overview

Topic	Description
Time Estimate:	3 hours
Purpose of the Knowledge Check preparation:	This knowledge check preparation is part of the entry-level curriculum, Advanced Core Course for PMC VSRs. The purpose of this knowledge check preparation is to get PMC VSRs ready to take the Phase 5, Part 1(d) Knowledge Check.
Prerequisite Training Requirements:	Prior to taking the Phase 5, Part 1(d) Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–4 and Phase 5 lessons 1–28. Refer to the PMC VSR Program Of Instruction (POI) for a list of lessons.
Target Audience:	This knowledge check preparation is for entry-level PMC VSRs.
References:	See Phase 5, Part 1(d) Knowledge Check Preparation: Appendix A for applicable references and job aids
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • VBA Applications (PMC VSR) • Processing Claims (PMC VSR)
Knowledge Check:	Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check
What You Need:	<ul style="list-style-type: none"> • Master Course Map learning aid • See Phase 5, Part 1(d) Knowledge Check Preparation: Appendix A for applicable references and job aids • Appendix B: Worksheet • Appendix C: Question and Answer Worksheet • Access to CPKM • Access to VSR Assistant

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PowerPoint Slides	Notes
<p>Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check Preparation</p>	
<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 Notify Claimant]; 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]; style P1d stroke:#f00,stroke-width:2px</pre>	

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PowerPoint Slides	Notes
<p>Why It Matters!</p> <p>PMC VSRs are responsible for completing tasks beyond determining basic eligibility as well as determining if a claim is ready to rate.</p> <p>These tasks include:</p> <ul style="list-style-type: none">• Verifying proof of death for survivor's benefits• Determining whether to apply Liberalizing Law• Applying rules for Veteran married to Veteran cases• Determining eligibility for accrued benefits• Determine burial benefits eligibility• Determining eligibility for Month of Death (MOD) benefit• Identifying if a claim is ready to rate• Determining eligibility for DIC and parent's DIC	

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PowerPoint Slides	Notes
<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} A --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} C --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} E --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} style H stroke:#0000FF,stroke-width:2px </pre>	
<p>Knowledge Check Preparation Overview</p> <p>This preparation will consist of the following:</p> <ul style="list-style-type: none"> • Lesson objectives review • Partner activities • Question/answer forum 	

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PowerPoint Slides	Notes
<p>Phase 5, Part 1(d) Lessons</p> 	
<p>Verify Proof of Death of Veteran for Survivor's Benefits</p> <p>Verifying proof of death is used to determine eligibility for survivor's pension, DIC claims, accrued claims, and burial benefits.</p>	
<p>Verify Proof of Death of Veteran for Survivor's Benefits Objectives</p> <ul style="list-style-type: none"> • Determine if proof of death is of record. • Determine to develop for proof of death. • Establish death of a Veteran. 	

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PowerPoint Slides	Notes
<p>Verify Proof of Death of Veteran Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding verifying proof of death of a Veteran.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	
<p>Partner Activity—What Do I Need to Verify Proof of Death?</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review the Claim 1 provided by the instructor.○ Complete Appendix B: Part A—What Do I Need to Verify Proof of Death?○ Use the references in Appendix A, <i>Verify Proof of Death for Survivor's Benefits</i>○ Be prepared to share your finished activity with the class.• Time allowed: 7-10 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—What Do I Need to Verify Proof of Death? Answers</p> <ol style="list-style-type: none">1. Does the information provided in the example claim contain proof of death? If so, list the piece of information.<ul style="list-style-type: none">o <i>Answer provided by instructor based on example claim selected.</i>2. Is the proof of death provided satisfactory?<ul style="list-style-type: none">o <i>Answer provided by instructor based on example claim selected.</i>3. If development is needed, what information do you need to verify proof of death and establish the death of the Veteran?<ul style="list-style-type: none">o <i>Answer provided by instructor based on example claim selected.</i>	
<p>Apply Liberalizing Law to Pension Eligibility</p> <ul style="list-style-type: none">• At times, it may be necessary to apply liberalizing law to pension claims.• It applies to:<ul style="list-style-type: none">o Cases involving pending or previously denied claimso Original claims filed after the change in law or administrative issue	

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PowerPoint Slides	Notes
<p>Apply Liberalizing Law to Pension Eligibility Objectives</p> <p>Apply liberalizing law objectives:</p> <ul style="list-style-type: none">• Determine whether the Veteran meets criteria for liberalizing law.• Determine whether to apply liberalizing legislation eligibility.	
<p>Apply Liberalizing Law to Pension Eligibility Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding liberalizing law.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	

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PowerPoint Slides	Notes
<p>Group Activity—Should Liberalizing Law Be Applied?</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Review the Claim 2 as a class.○ Use the references in Appendix A, <i>Determine Whether to Apply Liberalizing Law</i>.○ Determine if liberalizing law should be applied.○ Raise your hand when you know the answer and be prepared to explain it.• Time allowed: 7-10 minutes	
<p>Process Veteran-Married-to-Veteran Cases</p> <ul style="list-style-type: none">• Calculation of pension rate for cases involving a Veteran married to another Veteran.• Veteran-married-to-Veteran pension cases where one Veteran has died, the other Veteran can only receive the Veteran's pension or survivors' pension, but not both.	

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PowerPoint Slides	Notes
<p>Process Veteran-Married-to-Veteran Cases Objectives</p> <p>Process a Veteran-married-to-Veteran claim.</p> <ul style="list-style-type: none">• Identify Veteran-married-to-Veteran cases.• Calculate the award payment for a Veteran-married-to-Veteran claim.	
<p>Process Veteran-Married-to-Veteran Cases Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding Veteran-married-to-Veteran cases.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity— Process a Veteran-Married-to-Veteran Claim</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review the claim 3 provided by the instructor.○ Complete Appendix B: Part B—Veteran-Married-to-Veteran Claim.○ Use the Veteran Married to Veteran job aid to help answer the questions.○ Be prepared to share your finished activity with the class.• Time allowed: 7-10 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—Veteran-Married-to-Veteran Claim Answers</p> <ol style="list-style-type: none"> 1. Calculate the combined MAPR. <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 2. Add the Veteran's spouse as a dependent. <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 3. Confirm the general award. <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 4. Flash the award, if necessary. <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 	
<p>Determine Accrued Benefits Eligibility</p> <p>Eligibility for accrued benefits depends on the following:</p> <ul style="list-style-type: none"> • Date of claim • Date of death of Veteran • Relationship of claimant to the Veteran or reimbursement 	

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PowerPoint Slides	Notes
<p>Determine Accrued Benefits Eligibility Objectives</p> <ul style="list-style-type: none">• Determine if an accrued claim meets time requirements.• Determine if accrued funds are payable.• Determine the proper claimant.	
<p>Accrued Benefits Eligibility Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding accrued benefits eligibility.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	

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PowerPoint Slides	Notes
<p>Small Group Activity—Accrued Benefits Eligibility</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three.○ Review the Claim 4 and Claim 5 provided by the instructor.○ Using the Accrued Benefits job aid, determine if the claimant in each claim is eligible for accrued benefits.○ Share your findings with another group and discuss any differences.• Time allowed: 7-10 minutes	
<p>Determine Burial Benefits Eligibility</p> <ul style="list-style-type: none">• Burial benefits assist the deceased Veteran’s family with unexpected expenses they will incur or have already incurred at a difficult time.• There are several different types of burial benefits, each with different eligibility requirements.• An application for one type is considered an application for all types of burial benefits or allowances.• Although a claimant may be denied for one burial benefit or allowance, the claimant may still be eligible for another type of burial benefit or allowance.	

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PowerPoint Slides	Notes
<p>Determine Burial Benefits Eligibility Objectives</p> <p>Determine burial benefits eligibility.</p> <ul style="list-style-type: none">• Define types of burial benefits• Determine whether general eligibility requirements for burial benefits are met.• Identify claimant eligible for payment.• Determine whether eligibility requirements for service-connected (SC) burial benefits are met.• Determine whether eligibility requirements for nonservice-connected (NSC) burial benefits are met.• Determine whether eligibility requirements for VA hospitalization death burial benefits are met.• Determine whether development is required for burial-related information.• Determine if a burial claim requires a rating activity.	

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PowerPoint Slides	Notes
<p>Burial Benefits Eligibility Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding burial benefits eligibility.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	
<p>Partner Activity–Burial Benefits Eligibility</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review the Claim 6 provided by the instructor.○ Answer the questions in Appendix B: Part C—Burial Benefit to determine if the claimant is eligible for burial benefits.○ Use the Burial Benefits Eligibility job aid.○ Be prepared to share your finished activity with the class.• Time allowed: 7-10 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity–Burial Benefits Eligibility Answers (1 of 3)</p> <p>1. Who is the claimant?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>2. What kind of claim is this?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>3. Is the claimant eligible for SC burial benefits?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 	
<p>Partner Activity–Burial Benefits Eligibility Answers (2 of 3)</p> <p>4. Is the claimant eligible for NSC burial benefits?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>5. Is the claimant eligible for VA hospitalization death burial benefits?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>6. Is the claimant eligible for transportation reimbursement?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 	

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PowerPoint Slides	Notes
<p>Partner Activity–Burial Benefits Eligibility Answers (3 of 3)</p> <p>7. Is the claimant eligible for a plot allowance?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i> <p>8. Is development required to determine eligibility? If so, for what?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i> <p>9. Should this claim be submitted to the rating activity? Why or why not?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i>	
<p>Determine Month of Death (MOD) Eligibility</p> <ul style="list-style-type: none">• MOD benefit is available to eligible surviving spouse of Veteran.• In order for the surviving spouse to be eligible for MOD, the Veteran had to have been entitled to pension or compensation benefits at the time of death	

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PowerPoint Slides	Notes
<p>Determine MOD Eligibility Objectives</p> <p>Determine whether the surviving spouse is eligible for MOD benefit.</p> <ul style="list-style-type: none">• Determine whether Veteran was eligible to receive pension or compensation benefits at time of death.• Determine whether MOD payment was made to the surviving spouse.• Check whether Veteran was married to claimant at time of death.	
<p>MOD Benefit Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding month of death benefit.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—MOD Benefit</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review the Claim 7 provided by the instructor.○ Answer the questions in Appendix B: Part D—Month of Death to determine whether the surviving spouse is eligible for MOD.○ Be prepared to share your finished activity with the class.• Time allowed: 7-10 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—MOD Answers</p> <p>1. Was the Veteran receiving benefits at time of death?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>2. Had an MOD payment been made?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>3. Is the claimant an eligible surviving spouse?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> <p>4. Is development necessary?</p> <ul style="list-style-type: none"> ○ <i>Answer provided by instructor based on example claim selected.</i> 	
<p>Overview of Ready to Rate</p> <p>A claim that is ready to rate:</p> <ul style="list-style-type: none"> • Prevents delay in claims processing • Allows the RVSR to make determination for benefit entitlement 	

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PowerPoint Slides	Notes
<p>Overview of Ready to Rate Objectives</p> <ul style="list-style-type: none">• Determine whether a claim requires a rating decision.<ul style="list-style-type: none">○ Explain why a claim requires a rating decision.○ Identify the types of claims that require a rating decision.• List the required evidence for a claim that is ready to rate.	
<p>Ready to Rate Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding ready to rate.○ Questions will be answered at the end of the Knowledge Check preparation.• Time allowed: 5 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—Overview of Ready to Rate</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review the Claim 8 provided by the instructor.○ Answer the questions in Appendix B: Part E— Overview of Ready to Rate to determine whether the claim needs a rating decision and what is needed for the rating decision.○ Be prepared to share your finished activity with the class.• Time allowed: 7-10 minutes	

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PowerPoint Slides	Notes
<p>Partner Activity—Overview of Ready to Rate Answers</p> <p>1. What is the type of claim?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i> <p>2. Is a rating decision required? If so, why?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i> <p>3. Does the claim require development to be ready to rate? If yes, what evidence is needed?</p> <ul style="list-style-type: none">○ <i>Answer provided by instructor based on example claim selected.</i>	
<p>Determine Eligibility for DIC and Parents' DIC</p> <ul style="list-style-type: none">• Surviving spouses and child dependents may qualify for the following DIC benefits:<ul style="list-style-type: none">○ DIC Under 38 U.S.C. 1310○ DIC Under 38 U.S.C. 1151○ DIC Under 38 U.S.C. 1318• Parents may qualify for the following DIC benefits:<ul style="list-style-type: none">○ DIC Under 38 U.S.C. 1310○ DIC Under 38 U.S.C. 1151	


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PowerPoint Slides	Notes
<p>Determine Eligibility for DIC and Parents' DIC Objectives</p> <p>Determine whether the surviving spouse, dependent child, or parent meets the eligibility criteria for DIC.</p> <ul style="list-style-type: none"> • Determine whether the claimant is claiming DIC under 38 U.S.C. 1310, 1318, or 1151. • Determine whether the evidence of death is on file. • Determine whether cause of death is on file. • Determine the relationship to a Veteran for the purpose of receiving DIC benefits. • Determine eligibility for DIC claim. • Determine eligibility for parents' DIC claim. 	
<p>Eligibility for DIC and Parents' DIC Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding DIC and Parents' DIC. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	

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PowerPoint Slides	Notes
<p>Group Activity—Determine Eligibility for DIC and Parents' DIC</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Review the Claim 9 as a class.○ Use the references and job aids in Appendix A, <i>Determine Whether the Surviving Spouse, Dependent Child, or Parent Meets the Eligibility Criteria for DIC</i>.○ Work together as a class to determine whether the claimant meets the eligibility for DIC.• Time allowed: 10-15 minutes	
<p>Question and Answer Forum</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three or four.○ Review the Appendix C: Question and Answer Worksheet with your group.○ Mark any questions that need further clarification from the instructor.○ Be prepared to share your answers with the class.• Time allowed: 10-15 minutes	

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PowerPoint Slides	Notes
<p>Question and Answer Clarification</p> 	
<p>What's Next?</p> <p>Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check</p>	