

#### 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

Lesson Plan

September 11, 2017 Version 1.0

#### 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, trainees 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> <li>Program Benefits and Eligibility (PMC VSR)</li> <li>VBA Applications (PMC VSR)</li> <li>Processing Claims (PMC VSR)</li> </ul>
Knowledge Check:	Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check

Topic	Description	
What You	Master Course Map learning aid	
Need:	<ul> <li>See Phase 5, Part 1(d) Knowledge Check Preparation:</li> <li>Appendix A for applicable references and job aids</li> </ul>	
	Appendix B: Worksheet	
	Appendix C: Question and Answer Worksheet	
	• Slides	
	• Projector	
	Access to CPKM	
	Access to VSR Assistant	
	The following types of example claims:	
	<ul> <li>Claim 1 (pmc_vsr_case_70) Verifying proof of death claim (development needed)</li> </ul>	
	<ul> <li>Claim 2 (pmc_vsr_case_71) Claim eligible for application of liberalizing law</li> </ul>	
	<ul> <li>Claim 3: (pmc_vsr_case_72a [spouse 1] and pmc_vsr_case_72b [spouse 2]) Vet-to-Vet claim requiring Veteran spouse to be added as dependent, confirmation of general award, and flashing of award</li> </ul>	
	o Claim 4: (pmc_vsr_case_73) Accrued benefits	
	o Claim 5: (pmc_vsr_case_74) Substitution claim	
	o Claim 6: (pmc_vsr_case_75) Claim for burial benefits	
	o Claim 7: (pmc_vsr_case_76) Claim for MOD (eligible)	
	<ul> <li>Claim 8: (pmc_vsr_case_77) Claim requiring a rating decision (development needed)</li> </ul>	
	<ul> <li>Claim 9: (pmc_vsr_case_78) Claim for DIC under 38</li> <li>U.S.C. 1310</li> </ul>	

#### **Instructor Notes**

This knowledge check preparation will provide trainees with a refresher of the topics covered in Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate. This will include a review of all lesson objectives, participation in activities to reinforce their

understanding, and a question and answer forum to address any misconceptions and provide additional clarification about the information presented.

PowerPoint Slides	Instructor Activities
Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check Preparation	DISPLAY slide 1. "Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check Preparation" INTRODUCE yourself as the instructor. INTRODUCE the knowledge check preparation.
PHASE 5 PART 1 Determine Eligibility  PHASE 5 PART 2 Process a Claim  PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision  PHASE 5 PART 4 Notify Claimant  PHASE 5 PART 1d Beyond Basic Eligibility  PHASE 5 PART 1d Beyond Basic Eligibility  PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate	DISPLAY slide 2. "You Are Here"  REFER to the PMC VSR Master Course Map learning aid.  INFORM trainees that this knowledge check preparation will assist them in successfully completing the Phase 5, Part 1(d) Knowledge Check.

PowerPoint Slides	Instructor Activities
Why It Matters!  PMC VSRs are responsible for completing tasks beyond determining basic eligibility as well as determining if a claim is ready to rate.	DISPLAY slide 3. "Why It Matters!"  REMIND trainees that during the process of determining eligibility, they are also responsible for completing tasks that establish eligibility that may only apply to some claim types.
<ul><li>These tasks include:</li><li>Verifying proof of death for survivor's benefits</li></ul>	<b>EXPLAIN</b> to trainees that they are also responsible for determining if the claim is ready to rate, if it requires a rating decision.
<ul> <li>Determining whether to apply Liberalizing Law</li> <li>Applying rules for Veteran</li> </ul>	<b>REFER</b> trainees to Appendix A and have them briefly review all the references that are applicable to the award adjustment lessons.
<ul><li>married to Veteran cases</li><li>Determining eligibility for accrued benefits</li></ul>	
Determine burial benefits eligibility	
Determining eligibility for Month of Death (MOD) benefit	
Identifying if a claim is ready to rate	
<ul> <li>Determining eligibility for DIC and parent's DIC</li> </ul>	

# PHASE 5 PART 1a

#### **DISPLAY** slide

4. "Knowledge Check"

**Instructor Activities** 

**INFORM** trainees that they will be assessed on this content in the Phase 5, Part 1(d) Knowledge Check.

**REMIND** trainees that all the lessons included on the knowledge check are also listed on the POI.

# PHASE 5 PART 1a Initial Screening and Establishing a Claim Phase 5 Part 1a Knowledge Check Phase 5 Part 1b Basic Eligibility Phase 5 Part 1b Knowledge Check Phase 5 Part 1c Knowledge Check Phase 5 Part 1d Knowledge Check Phase 5 Part 1d Knowledge Check

### **Knowledge Check Preparation Overview**

This preparation will consist of the following:

- Lesson objectives review
- Partner activities
- Question/answer forum

#### **DISPLAY** slide

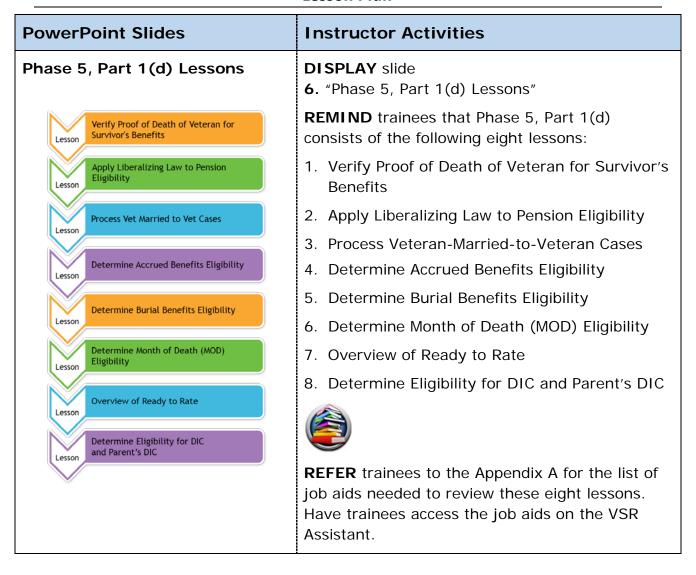
5. "Knowledge Check Preparation Overview"

**EXPLAIN** that this preparation will consist of a review of the learning objectives for each lesson in Phase 5, Part 1(d). This is followed by an activity to help reinforce their understanding of those objectives.

**INFORM** trainees that in order to save time for the activities, there will be time at the end of this preparation for questions to be discussed.



**REFER** trainees to Appendix C: Question and Answer Worksheet.



PowerPoint Slides	Instructor Activities
Verify Proof of Death of Veteran for Survivor's Benefits  Verifying proof of death is used to determine eligibility for survivor's pension, DIC claims, accrued claims, and burial benefits.	<b>DISPLAY</b> slide <b>7.</b> "Verify Proof of Death of Veteran for Survivor's Benefits"
	<b>TRANSITION</b> to the first lesson in Phase 5, Part 1(d): Verify Proof of Death of Veteran for Survivor's Benefits.
	<b>EXPLAIN</b> that the evidence needed to verify proof of death will depend on where the Veteran's death occurred and the circumstances of the Veteran's death.
	<b>REFER</b> trainees to the references in Appendix A, Verify Proof of Death of Veteran for Survivor's Benefits section.
Verify Proof of Death of Veteran for Survivor's Benefits Objectives	<b>DI SPLAY</b> slide  8. "Verify Proof of Death of Veteran for Survivor's Benefits Objectives"
Determine if proof of death is of	PRESENT the objectives for this lesson.
<ul><li>record.</li><li>Determine to develop for proof of death.</li></ul>	<b>ALLOW</b> about 5–7 minutes to summarize the content related to these objectives.
Establish death of a Veteran.	

PowerPoint Slides	Instructor Activities
Verify Proof of Death of Veteran  Question Writing Opportunity  Instructions:	<b>DISPLAY</b> slide <b>9.</b> "Verify Proof of Death of Veteran Question Writing Opportunity"
<ul> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding verifying proof of death of a Veteran.</li> </ul>	INFORM trainees that before transitioning to the next lesson for review, they will have the opportunity to capture any questions they have regarding verifying proof of death of a Veteran.
<ul> <li>Questions will be answered at the end of this preparation.</li> </ul>	REFER trainees to Appendix C: Question and Answer Worksheet.
Time allowed: 5 minutes	<b>DIRECT</b> trainees to write any questions or concerns that they have regarding verifying proof of death of a Veteran.
	ALLOW 5 minutes to complete this opportunity.
Partner Activity—What Do I Need to Verify Proof of Death?	DISPLAY slide  10. "Partner Activity— What Do I Need to Verify Proof of Death?"
<ul><li>Instructions:</li><li>Divide into pairs.</li></ul>	DIVIDE trainees into pairs.
<ul><li>Review the Claim 1 provided by the instructor.</li></ul>	DIRECT trainees to:  Review the Claim 1.
<ul> <li>Complete Appendix B: Part         A—What Do I Need to Verify         Proof of Death?     </li> </ul>	Complete Appendix B: Part A—What Do I Need to Verify Proof of Death? by answering the questions using the Example Claim 1 and
<ul> <li>Use the references in Appendix A, Verify Proof of Death for Survivor's Benefits</li> </ul>	corresponding references. <b>ALLOW</b> 7-10 minutes to complete this activity.
<ul> <li>Be prepared to share your finished activity with the class.</li> </ul>	
Time allowed: 7-10 minutes	

PowerPoint Slides		Instructor Activities
Partner Activity—What Do I Need to Verify Proof of Death? Answers		DISPLAY slide 11. "Partner Activity—What Do I Need to Verify Proof of Death? Answers"
the ex	the information provided in cample claim contain proof ath? If so, list the piece of nation.	PROVIDE the answers to all three questions.
ins	nswer provided by structor based on example nim selected.	<b>ASK</b> trainees if they have any questions or need clarification on the answers given.
	proof of death provided actory?	
ins	nswer provided by structor based on example nim selected.	
3. If development is needed, what information do you need to verify proof of death and establish the death of the Veteran?		
ins	nswer provided by structor based on example nim selected.	

# Apply Liberalizing Law to Pension Eligibility

**PowerPoint Slides** 

- At times, it may be necessary to apply liberalizing law to pension claims.
- It applies to:
  - Cases involving pending or previously denied claims
  - Original claims filed after the change in law or administrative issue

#### **Instructor Activities**

#### **DISPLAY** slide

12. "Apply Liberalizing Law to Pension Eligibility"

**TRANSITION** to the second lesson in Phase 5, Part 1(d): Apply Liberalizing Law to Pension Eligibility.

**REMIND** trainees that a liberalizing law is any law that brings about a substantive change to the law, creating a new and different entitlement to pension benefits.



**EMPHASIZE** that retroactive benefits can be authorized if the claimant had potential entitlement on the date the law/regulation became effective and entitlement continued through the effective date of the award.



**EMPHASIZE** that it is rare that trainees will have to grant liberalizing law on an original grant of benefits. In the event that a claim is pending, but all information for the period of one year prior is provided, you would award liberalizing legislation in addition to the original grant. In most cases, you will grant liberalizing legislation, then, develop for information.



**REFER** trainees to the references in Appendix A, Determine Whether to Apply Liberalizing Law section.

PowerPoint Slides	Instructor Activities
Apply Liberalizing Law to Pension Eligibility Objectives  Apply liberalizing law objectives:	DISPLAY slide 13. "Apply Liberalizing Law to Pension Eligibility Objectives" PRESENT the objectives for this lesson.
Determine whether the Veteran meets criteria for liberalizing law.	<b>ALLOW</b> about 5–7 minutes to summarize the content related to these objectives.
Determine whether to apply liberalizing legislation eligibility.	
Apply Liberalizing Law to Pension Eligibility Question Writing Opportunity	<b>DISPLAY</b> slide <b>14</b> . "Apply Liberalizing Law to Pension Eligibility  Question Writing Opportunity"
<ul> <li>Instructions:</li> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding liberalizing law.</li> </ul>	<b>REMIND</b> trainees that at this time, they can capture any questions they have regarding liberalizing law.
<ul> <li>Questions will be answered at the end of this preparation.</li> </ul>	REFER trainees to Appendix C: Question and Answer Worksheet.  DIRECT trainees to write any questions on the
Time allowed: 5 minutes	worksheet. <b>ALLOW</b> 5 minutes to complete this opportunity.

PowerPoint Slides	Instructor Activities
Group Activity—Should Liberalizing Law Be Applied?  Instructions:	<b>DISPLAY</b> slide <b>15.</b> "Group Activity—Should Liberalizing Law Be Applied?"
o Review the Claim 2 as a	DIRECT trainees to:
class.	Review the Claim 2 you provided.
<ul> <li>Use the references in Appendix A, Determine Whether to Apply Liberalizing</li> </ul>	<ul> <li>Upon completion of review, raise their hand when they have determined if liberalizing law should be applied.</li> </ul>
<ul><li>Law.</li><li>o Determine if liberalizing law</li></ul>	SELECT a trainee to provide the answer and explain how he/she reached his/her conclusion.
should be applied.	· ·
o Raise your hand when you	<b>PROVIDE</b> any clarification, if needed.
know the answer and be prepared to explain it.	<b>ALLOW</b> 7-10 minutes to complete this activity.
Time allowed: 7-10 minutes	

PowerPoint Slides	Instructor Activities
Process Veteran-Married-to- Veteran Cases	<b>DISPLAY</b> slide <b>16.</b> "Process Veteran-Married-to-Veteran Cases"
Calculation of pension rate for cases involving a Veteran	<b>TRANSITION</b> to the third lesson in Phase 5, Part 1(d): Process Veteran-Married-to-Veteran Cases
<ul> <li>warried to another Veteran.</li> <li>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.</li> </ul>	REMIND trainees that Vet-to-Vet cases are usually combined into one award payment unless requested otherwise by either Veteran or both Veterans are eligible for SMP.
	<b>EMPHASIZE</b> that in 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.
	<b>REFER</b> trainees to the <b>Veteran Married to Veteran</b> job aid. Give them 5 minutes to review the job aid.
Process Veteran-Married-to- Veteran Cases Objectives Process a Veteran-married-to- Veteran claim.	DISPLAY slide 17. "Process Veteran-Married-to-Veteran Cases Objectives"  PRESENT the objectives for this lesson.
Identify Veteran-married-to- Veteran cases.	<b>ALLOW</b> about 5–7 minutes to summarize the content related to these objectives.
Calculate the award payment for a Veteran-married-to-Veteran claim.	

PowerPoint Slides	Instructor Activities
Process Veteran-Married-to- Veteran Cases Question Writing Opportunity	<b>DISPLAY</b> slide <b>18.</b> "Process Veteran-Married-to-Veteran Cases  Question Writing Opportunity"
<ul> <li>Instructions:</li> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding Veteran-married-to-Veteran cases.</li> <li>Questions will be answered at the end of this preparation.</li> <li>Time allowed: 5 minutes</li> </ul>	REMIND trainees that at this time, they can capture any questions they have regarding Vetto-Vet cases.  REFER trainees to Appendix C: Question and Answer Worksheet.  DIRECT trainees to write any questions on the worksheet.  ALLOW 5 minutes to complete this opportunity.
Partner Activity— Process a Veteran-Married-to-Veteran Claim	<b>DISPLAY</b> slide <b>19</b> . "Partner Activity— Process a Veteran- Married-to-Veteran Claim"
Instructions:	DIVIDE trainees into pairs.
o Divide into pairs.	DIRECT trainees to:
<ul> <li>Review the claim 3 provided by the instructor.</li> </ul>	<ul><li>Review the claim 3.</li><li>Complete Appendix B: Part B—Veteran-</li></ul>
<ul> <li>Complete Appendix B: Part</li> <li>B—Veteran-Married-to-</li> <li>Veteran Claim.</li> </ul>	Married-to-Veteran Claim by answering the questions using the claim 3.  Use the job aid and references noted in Part B
<ul> <li>Use the Veteran Married to Veteran job aid to help answer the questions.</li> </ul>	of Appendix B.  ALLOW 7-10 minutes to complete this activity.
<ul> <li>Be prepared to share your finished activity with the class.</li> </ul>	
Time allowed: 7-10 minutes	

PowerPoint Slides	Instructor Activities
Partner Activity—Veteran- Married-to-Veteran Claim Answers	<b>DI SPLAY</b> slide <b>20.</b> "Partner Activity—Veteran-Married-to-Veteran Claim Answers"
1. Calculate the combined MAPR.	<b>PROVIDE</b> the answers for all four questions.
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	<b>DISCUSS</b> the answers and provide any clarification, if needed.
<ol><li>Add the Veteran's spouse as a dependent.</li></ol>	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
3. Confirm the general award.	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
4. Flash the award, if necessary.	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
Determine Accrued Benefits Eligibility	DISPLAY slide 21. "Determine Accrued Benefits Eligibility"
Eligibility for accrued benefits depends on the following:	<b>TRANSITION</b> to the fourth lesson in Phase 5, Part 1(d): Determine Accrued Benefits Eligibility.
Date of claim	<b>REMIND</b> trainees that substitution claims are
Date of death of Veteran	also considered accrued claims.
<ul> <li>Relationship of claimant to the Veteran or reimbursement</li> </ul>	
	<b>REFER</b> trainees to the <b>Accrued Benefits</b> job aid and give 3-4 minutes to review the criteria and types of accrued claims.

PowerPoint Slides	Instructor Activities
Determine Accrued Benefits Eligibility Objectives  • Determine if an accrued claim	<b>DISPLAY</b> slide <b>22.</b> "Determine Accrued Benefits Eligibility Objectives"
meets time requirements.	PRESENT the objectives for this lesson.
Determine if accrued funds are payable.	<b>ALLOW</b> about 5–7 minutes to summarize the content related to these objectives.
Determine the proper claimant.	
Accrued Benefits Eligibility Question Writing Opportunity  Instructions:	<b>DISPLAY</b> slide <b>23.</b> "Accrued Benefits Eligibility Question Writing Opportunity"
o Use Appendix C: Question and Answer Worksheet to write any questions regarding accrued benefits	<b>REMIND</b> trainees that at this time they can capture any questions they have regarding accrued benefits.
eligibility.	
<ul> <li>Questions will be answered at the end of this preparation.</li> </ul>	<b>REFER</b> trainees to Appendix C: Question and Answer Worksheet.
Time allowed: 5 minutes	<b>DIRECT</b> trainees to write any questions on the worksheet.
	<b>ALLOW</b> 5 minutes to complete this opportunity.

PowerPoint Slides	Instructor Activities
<ul> <li>Small Group Activity–Accrued Benefits Eligibility</li> <li>Instructions:         <ul> <li>Divide into groups of three.</li> <li>Review the Claim 4 and Claim 5 provided by the instructor.</li> <li>Using the Accrued Benefits job aid, determine if the claimant in each claim is eligible for accrued benefits.</li> <li>Share your findings with another group and discuss any differences.</li> </ul> </li> <li>Time allowed: 7-10 minutes</li> </ul>	<ul> <li>DI SPLAY slide</li> <li>24. "Small Group Activity–Accrued Benefits Eligibility"</li> <li>DI VI DE trainees into groups of three.</li> <li>DI RECT trainees to:</li> <li>Review the Claim 4 and 5.</li> <li>Using the Accrued Benefits job aid, determine if the claimant in each claim is eligible for accrued benefits.</li> <li>Share their findings with another group and discuss any differences.</li> <li>ALLOW 7-10 minutes to complete this activity.</li> </ul>

PowerPoint Slides	Instructor Activities
Determine Burial Benefits Eligibility	DISPLAY slide 25. "Determine Burial Benefits Eligibility"
Burial benefits assist the deceased Veteran's family with	<b>TRANSITION</b> to the fifth lesson in Phase 5, Part 1(d): Determine Accrued Benefits Eligibility.
unexpected expenses they will incur or have already incurred at a difficult time.	<b>REMIND</b> trainees of the importance of determining eligibility for burial benefits:
There are several different types of burial benefits, each with different eligibility requirements.	<ul> <li>Processing these payments efficiently helps the deceased Veteran's family with unexpected expenses they will incur or have already incurred at a difficult time.</li> </ul>
An application for one type is considered an application for all types of burial benefits or allowances.	<ul> <li>Recognizing the correct type of burial benefit will help trainees identify the different eligibility requirements and apply the correct rules.</li> </ul>
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.	<b>EMPHASIZE</b> that an application for one type of benefit is considered an application for all types of burial benefits or allowances.
	<b>EXPLAIN</b> that 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.

PowerPoint Slides	Instructor Activities
Determine Burial Benefits Eligibility Objectives	<b>DISPLAY</b> slide <b>26.</b> "Determine Burial Benefits Eligibility Objectives"
Determine burial benefits eligibility.	
Define types of burial benefits	PRESENT the objectives for this lesson.
Determine whether general eligibility requirements for burial benefits are met.	<b>ALLOW</b> about 7–10 minutes to summarize the content related to these objectives.
<ul> <li>Identify claimant eligible for payment.</li> </ul>	
Determine whether eligibility requirements for service-connected (SC) burial benefits are met.	
Determine whether eligibility requirements for nonservice-connected (NSC) burial benefits are met.	
<ul> <li>Determine whether eligibility requirements for VA hospitalization death burial benefits are met.</li> </ul>	
Determine whether development is required for burial-related information.	
Determine if a burial claim requires a rating activity.	

PowerPoint Slides	Instructor Activities
Burial Benefits Eligibility Question Writing Opportunity	<b>DISPLAY</b> slide <b>27.</b> "Burial Benefits Eligibility Question Writing Opportunity"
<ul> <li>Instructions:         <ul> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding burial benefits eligibility.</li> </ul> </li> </ul>	<b>REMIND</b> trainees that at this time they can capture any questions they have regarding burial benefits.
<ul> <li>Questions will be answered at the end of this preparation.</li> </ul>	REFER trainees to Appendix C: Question and Answer Worksheet.
Time allowed: 5 minutes	<b>DIRECT</b> trainees to write any questions on the worksheet.
	<b>ALLOW</b> 5 minutes to complete this opportunity.
Partner Activity-Burial Benefits Eligibility	<b>DISPLAY</b> slide <b>28.</b> "Partner Activity–Burial Benefits Eligibility"
Instructions:	DIVIDE trainees into pairs.
o Divide into pairs.	DIRECT trainees to:
<ul> <li>Review the Claim 6 provided by the instructor.</li> </ul>	<ul><li>Review the Claim 6.</li><li>Answer the questions in Appendix B: Part C—</li></ul>
o Answer the questions in	Burial Benefit.
Appendix B: Part C—Burial Benefit to determine if the claimant is eligible for burial benefits.	Using the <b>Burial Benefits Eligibility</b> job aid, determine if the claimant is eligible for burial benefits.
o Use the <b>Burial Benefits</b>	<ul> <li>Share their findings with another group and discuss any differences.</li> </ul>
Eligibility job aid.	<b>ALLOW</b> 7-10 minutes to complete this activity.
<ul> <li>Be prepared to share your finished activity with the class.</li> </ul>	7.22217 To Timides to complete this detivity.
Time allowed: 7-10 minutes	

PowerPoint Slides	Instructor Activities
Partner Activity–Burial Benefits Eligibility Answers (1 of 3)  1. Who is the claimant?	<b>DISPLAY</b> slide <b>29</b> . "Partner Activity–Burial Benefits Eligibility Answers (1 of 3)"
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	PROVIDE the answers for the first set of questions.  DISCUSS the answers and provide any
2. What kind of claim is this?	clarification, if needed.
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
3. Is the claimant eligible for SC burial benefits?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	

PowerPoint Slides	Instructor Activities
Partner Activity–Burial Benefits Eligibility Answers (2 of 3)  4. Is the claimant eligible for NSC	DISPLAY slide 30. "Partner Activity–Burial Benefits Eligibility Answers (2 of 3)"
burial benefits?  o Answer provided by	<b>PROVIDE</b> the answers for the next set of questions.
instructor based on example claim selected.	<b>DISCUSS</b> the answers and provide any clarification, if needed.
5. Is the claimant eligible for VA hospitalization death burial benefits?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
6. Is the claimant eligible for transportation reimbursement?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	

PowerPoint Slides	Instructor Activities
Partner Activity–Burial Benefits Eligibility Answers (3 of 3)  7. Is the claimant eligible for a plot allowance?  o Answer provided by instructor based on example claim selected.	DISPLAY slide 31. "Partner Activity–Burial Benefits Eligibility Answers (3 of 3)"  PROVIDE the answers for the last set of questions.  DISCUSS the answers and provide any clarification, if needed.
<ul> <li>8. Is development required to determine eligibility? If so, for what?</li> <li>• Answer provided by instructor based on example claim selected.</li> </ul>	
<ul> <li>9. Should this claim be submitted to the rating activity? Why or why not?</li> <li>o Answer provided by instructor based on example claim selected.</li> </ul>	
Determine Month of Death (MOD) Eligibility	<b>DISPLAY</b> slide <b>32</b> . "Determine Month of Death (MOD) Eligibility"
<ul> <li>MOD benefit is available to eligible surviving spouse of Veteran.</li> <li>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.</li> </ul>	TRANSITION to the fifth lesson in Phase 5, Part 1(d): Determine MOD Eligibility.  REMIND trainees that 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.  REFER trainees to the references Appendix A, Determine Eligibility for Month of Death (MOD) Benefit section. Give them 5 minutes to review the references.

PowerPoint Slides	Instructor Activities
Determine MOD Eligibility Objectives	DISPLAY slide 33. "Determine MOD Eligibility Objectives"
Determine whether the surviving spouse is eligible for MOD benefit.	PRESENT the objectives for this lesson.  ALLOW about 5–7 minutes to summarize the
Determine whether Veteran was eligible to receive pension or compensation benefits at time of death.	content related to these objectives.
Determine whether MOD payment was made to the surviving spouse.	
Check whether Veteran was married to claimant at time of death.	
MOD Benefit Question Writing	34. "MOD Benefit Question Writing Opportunity"
Opportunity	REMIND trainees that at this time they can
Instructions:	capture any questions they have regarding MOD benefit.
<ul> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding month of death</li> </ul>	Deficit.
benefit.	<b>REFER</b> trainees to Appendix C: Question and Answer Worksheet.
<ul> <li>Questions will be answered at the end of this preparation.</li> </ul>	DIRECT trainees to write any questions on the worksheet.
Time allowed: 5 minutes	ALLOW 5 minutes to complete this opportunity.

PowerPoint Slides	Instructor Activities
<ul> <li>Partner Activity—MOD Benefit</li> <li>Instructions:</li> <li>Divide into pairs.</li> <li>Review the Claim 7 provided by the instructor.</li> </ul>	DISPLAY slide 35. "Partner Activity—MOD Benefit"  DIVIDE trainees into pairs.  DIRECT trainees to:  Review the Claim 7.
o Answer the questions in Appendix B: Part D—Month of Death to determine whether the surviving spouse is eligible for MOD.	<ul> <li>Using the references provided in Appendix B:         Part D—Month of Death, determine whether         the surviving spouse is eligible for MOD.</li> <li>ALLOW 7-10 minutes to complete this activity.</li> </ul>
<ul> <li>Be prepared to share your finished activity with the class.</li> <li>Time allowed: 7-10 minutes</li> </ul>	

PowerPoint Slides	Instructor Activities
Partner Activity—MOD Answers  1. Was the Veteran receiving benefits at time of death?	DISPLAY slide 36. "Partner Activity—MOD Answers"  PROVIDE the answers for all four questions.
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	<b>DISCUSS</b> the answers and provide any clarification, if needed.
Had an MOD payment been made?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
3. Is the claimant an eligible surviving spouse?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
4. Is development necessary?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	

PowerPoint Slides	Instructor Activities
Overview of Ready to Rate  A claim that is ready to rate:  Prevents delay in claims processing  Allows the RVSR to make determination for benefit entitlement	DISPLAY slide 37. "Overview of Ready to Rate"  TRANSITION to the seventh lesson in Phase 5, Part 1(d): Overview of Ready to Rate.  REMIND trainees that depending on the benefit being claimed, a rating decision may be required and may require development.  EMPHASIZE that a rating decision is needed to determine whether the claimant is entitled to benefits based on available evidence in accordance with laws and regulations.  REFER trainees to the Ready to Rate job aid for a list of references and types of claims that require a rating decision.
Overview of Ready to Rate Objectives	DISPLAY slide 38. "Overview of Ready to Rate Objectives"
<ul> <li>Determine whether a claim requires a rating decision.</li> <li>Explain why a claim requires a rating decision.</li> <li>Identify the types of claims that require a rating decision.</li> <li>List the required evidence for a claim that is ready to rate.</li> </ul>	PRESENT the objectives for this lesson.  ALLOW about 5–7 minutes to summarize the content related to these objectives.

PowerPoint Slides	Instructor Activities
Ready to Rate Question Writing Opportunity  Instructions:	DISPLAY slide 39. "Ready to Rate Question Writing Opportunity"
<ul> <li>Use Appendix C: Question and Answer Worksheet to write any questions regarding ready to rate.</li> <li>Questions will be answered at the end of the Knowledge Check preparation.</li> </ul>	REMIND trainees that at this time they can capture any questions they have regarding ready to rate.  REFER trainees to Appendix C: Question and Answer Worksheet.
Time allowed: 5 minutes	<b>DIRECT</b> trainees to write any questions on the worksheet. <b>ALLOW</b> 5 minutes to complete this opportunity.
Partner Activity—Overview of Ready to Rate	DISPLAY slide 40. "Partner Activity—Overview of Ready to
Instructions:	Rate"
o Divide into pairs.	DIVIDE trainees into pairs.
o Review the Claim 8 provided	DIRECT trainees to:
by the instructor.	Review the Claim 8.
<ul> <li>Answer the questions in Appendix B: Part E—</li> </ul>	Answer the questions in Appendix B: Part E— Overview of Ready to Rate.
Overview of Ready to Rate to determine whether the claim needs a rating decision and what is needed for the rating decision.	<ul> <li>Using the Ready to Rate job aid, determine whether the claim needs a rating decision and what is needed for the rating decision.</li> <li>ALLOW 7-10 minutes to complete this activity.</li> </ul>
<ul> <li>Be prepared to share your finished activity with the class.</li> </ul>	
Time allowed: 7-10 minutes	

PowerPoint Slides	Instructor Activities
Partner Activity—Overview of Ready to Rate Answers	DISPLAY slide 41. "Partner Activity—Overview of Ready to Rate Answers"
<ul> <li>1. What is the type of claim?</li> <li>Answer provided by instructor based on example claim selected.</li> </ul>	PROVIDE the answers for all three questions.  DISCUSS the answers and provide any clarification, if needed.
2. Is a rating decision required? If so, why?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	
3. Does the claim require development to be ready to rate? If yes, what evidence is needed?	
<ul> <li>Answer provided by instructor based on example claim selected.</li> </ul>	

Po	owerPoint Slides	Instructor Activities
	etermine Eligibility for DIC nd Parents' DIC	<b>DISPLAY</b> slide <b>42.</b> "Determine Eligibility for DIC and Parents"
•	Surviving spouses and child dependents may qualify for the following DIC benefits:	TRANSITION to the eighth lesson in Phase 5, Part 1(d): Determine Eligibility for DIC and
	<ul> <li>DIC Under 38 U.S.C. 1310</li> <li>DIC Under 38 U.S.C. 1151</li> <li>DIC Under 38 U.S.C. 1318</li> </ul>	Parent's DIC. <b>REMIND</b> trainees that surviving spouses, child dependents, and parents may be eligible to
•	Parents may qualify for the following DIC benefits:	receive DIC benefits.
	<ul><li>DIC Under 38 U.S.C. 1310</li><li>DIC Under 38 U.S.C. 1151</li></ul>	<b>EMPHASIZE</b> that eligibility requirements for DIC for surviving spouses and dependent children is different than for parents' DIC.
		<b>REFER</b> trainees to the job aids listed in Appendix A, <i>Determine Eligibility for DIC and Parents' DIC</i> section.

PowerPoint Slides	Instructor Activities
Determine Eligibility for DIC and Parents' DIC Objectives	DISPLAY slide 43. "Determine Eligibility for DIC and Parents"
Determine whether the surviving spouse, dependent child, or parent meets the eligibility criteria for DIC.  • Determine whether the claimant	PRESENT the objectives for this lesson.  ALLOW about 7–10 minutes to summarize the content related to these objectives.
is claiming DIC under 38 U.S.C. 1310, 1318, or 1151.	
Determine whether the evidence of death is on file.	
<ul> <li>Determine whether cause of death is on file.</li> </ul>	
<ul> <li>Determine the relationship to a Veteran for the purpose of receiving DIC benefits.</li> </ul>	
Determine eligibility for DIC claim.	
<ul> <li>Determine eligibility for parents' DIC claim.</li> </ul>	
Eligibility for DIC and Parents' DIC Question Writing Opportunity	<b>DISPLAY</b> slide <b>44.</b> "Eligibility for DIC and Parents' DIC Question Writing Opportunity"
Instructions:	<b>REMIND</b> trainees that at this time they can capture any questions they have regarding DIC and Parents' DIC.
<ul> <li>Use Appendix C: Question and Answer Worksheet to</li> </ul>	
write any questions regarding DIC and Parents' DIC.	
<ul> <li>Questions will be answered at the end of the Knowledge</li> </ul>	<b>REFER</b> trainees to Appendix C: Question and Answer Worksheet.
Check preparation.	<b>DIRECT</b> trainees to write any questions on the worksheet.
Time allowed: 5 minutes	<b>ALLOW</b> 5 minutes to complete this opportunity.

PowerPoint Slides	Instructor Activities
Group Activity—Determine Eligibility for DIC and Parents' DIC	<b>DISPLAY</b> slide <b>45</b> . "Group Activity—Determine Eligibility for DIC and Parents' DIC"
Instructions:	<b>DIVIDE</b> trainees into pairs.
o Review the Claim 9 as a	DIRECT trainees to:
class.	Review Claim 9 as a class.
o Use the references and job aids in Appendix A, Determine Whether the Surviving Spouse, Dependent Child, or Parent Meets the	Use the references in Appendix A, Determine     Whether the Surviving Spouse, Dependent     Child, or Parent Meets the Eligibility Criteria     for DIC section.
Eligibility Criteria for DIC.	Work together as a class to determine     whether the element meets the eligibility for
<ul> <li>Work together as a class to determine whether the claimant meets the eligibility for DIC.</li> </ul>	whether the claimant meets the eligibility for DIC.  ALLOW 10-15 minutes to complete this activity.
Time allowed: 10-15 minutes	
Question and Answer Forum	DISPLAY slide
Instructions:	<b>46</b> . "Question and Answer Forum"
o Divide into groups of three or	<b>DIVIDE</b> trainees into groups of three or four.
four.	<b>DIRECT</b> trainees to review, with their group, any questions they had written down on Appendix C:
<ul> <li>Review the Appendix C:</li> <li>Question and Answer</li> </ul>	Questions they had written down on Appendix C.  Question and Answer Worksheet.
Worksheet with your group.	INFORM trainees to mark any questions that
o Mark any questions that	need further clarification from the instructor.
need further clarification from the instructor.	<b>ALLOW</b> 10-15 minutes for this forum.
o Be prepared to share your	<b>REVIEW</b> all questions with the class to confirm all answers are correct.
answers with the class.	an answers are correct.
Time allowed: 10-15 minutes	

PowerPoint Slides	Instructor Activities
Question and Answer Clarification	DISPLAY slide 47. "Question and Answer Clarification"
	<b>ASK</b> if trainees have any questions or concerns regarding Phase 5, Part 1(d). Use this time to clear up any confusion or misconceptions about the information presented.
	ANSWER any questions that need further clarification from the question and answer forum.
What's Next?  Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check	DISPLAY slide 48. "What's Next?"
	<b>DISCUSS</b> the upcoming Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check.
	<b>REMIND</b> trainees to use the job aids and resources provided to help answer the knowledge check questions.