

**Dependents, Interviews, Capacity  
& Welfare**

Pension and Fiduciary Service  
March 2021

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**Objectives**

- Document dependent information
- Populate required contact information
- Complete the assessment of capacity to manage funds
- Record environmental and social conditions

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**References**

- FPM I.2.C.1, *Interview Logistics and Contacts*
- FPM I.2.C.2, *Beneficiary Well-Being*
- FPM I.2.C.3, *Capacity to Manage Funds*

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 P&S SERVICE

## Dependents

- VA recognized dependents
  - Confirmed dependency
  - Needs being met?
  - Minor child registered for school?
  - Negative situation?
- Dependents not on the VA Award?



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## Other Interviews/Contacts

- Other than Beneficiary or Fiduciary
- Name
- Phone number
- Date interviewed
- Purpose of contact
- Relationship to beneficiary



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## Capacity to Manage Funds

- Awareness of:
  - Monthly income
  - Monthly expenses
- Ability to allocate funds to expenses
- Ability to pay monthly bills
- Capacity to handle VA funds



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 PAP SERVICE

## Environmental and Social Conditions

- Residence type
- Licensing status
- Abuse/neglect
- Adverse environmental conditions
- Social support network



Instructor  
Demonstration

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 PAP SERVICE

## Questions?



- Dependents
- Other Interviews/ Contacts
- Capacity to Manage Funds
- Environmental and Social Conditions

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 PAP SERVICE

## TMS Survey

- A satisfaction survey has been assigned to you in TMS.
- You should be able to complete the survey within ten minutes.
- Be sure to complete the survey in TMS to receive credit for this training.

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