



Beneficiary Welfare and Capacity

Pension and Fiduciary Service
September 2018




Objectives

- Gather physical characteristics
- Collect medical information
- Assess capacity to manage funds
- Determine the need for a competency evaluation
- Evaluate living conditions, welfare, and needs




References


- FPM 2.D.2, *Conditions of the Beneficiary*
- FPM 2.D.4, *Fiduciary Information for all Initial and Successor Initial Appointment Field Examinations*
- M21-1, III.iv.8.A.4.d, *Evidence Required to Restore Competency*
- FPG, *Field Examination Interview*

 **Physical Characteristics**


- Document in FELux
 - Beneficiary age
 - Beneficiary appearance
 - Beneficiary physical limitations
 - Observable
 - Non-apparent




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 **Medical Information**


- Two subsections
 - Medical
 - Orientation and Observations
- Document in FELux
 - Medical care
 - Hospitalization
 - Substance abuse
 - Medications
 - Medical conditions and diagnoses




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 **Orientation and Observations**


- Document in FELux
 - Orientation to person, place, events, and time
 - Beneficiary reaction
 - Other evidence of beneficiary's ability to communicate
 - Interview observations




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 **Capacity to Manage Funds**

- Assessment of capacity
 - Knowledge of finances
 - Comprehension of finances
- Corroborate Beneficiary
- Document in FELux
 - Sources and amounts of income and expenses
 - Handle money
 - Beneficiary ability
 - FE capacity determination
 - FE recommendation




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 **Competency Evaluation**

- Process and evidence to reverse rating
- Competency memorandum
- Annotate actions taken
- Supervised Direct Payment
 - VA is de facto fiduciary
 - Temporary not long-term


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 **Environment and Social Conditions**


- Document in FELux
 - Type of place beneficiary resides
 - Living arrangement
 - Way the beneficiary spends his/her time
 - Social relationships
 - Non-dependent(s) living in the beneficiary's home




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 **Welfare and Needs**

- Document in FELux
 - Needs met
 - Referral
 - Adverse conditions
 - Referral




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 **Questions?**



- Physical Characteristics
- Medical Information
- Orientation and Observation
- Capacity to Manage Funds
- Competency Evaluation
- Environmental and Social Conditions
- Welfare and Needs

 **TMS Survey and Assessment**

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

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