

Potential Changes to  
Benefit Entitlement  
Pension and Fiduciary Service  
September 2018

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### Objectives

- Identify the field examiner and fiduciary responsibilities in assisting beneficiaries with benefit entitlement changes
- Document and refer changes to benefit entitlement
- Identify and utilize intent to file (ITF) procedures
- Identify common benefit entitlement scenarios and corresponding requirements

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### References

- 38 CFR 3.150, *Forms to be furnished*
- FPM 2.D.3, *Financial Information of the Beneficiary*
- FPM 2.E.6, *Issues Other VA Benefits*
- FPM 2.I.2.a, *Field Exam Forms and Supporting Evidence*
- FPM 2.I.4, *Finalizing Field Examinations*
- M21-1 III.i.4, *Veterans Online Application (VONAPP) Direct Connect (VDC) Program and the Stakeholder Enterprise Portal (SEP)*
- M21-1 III.ii.2.B.1, *Applications for Compensation and/or Pension*
- M21-1 III.ii.2.C.2, *Intent to File*
- FPG, *Tasks in BFFS*
- FPG, *VA Claims: Documenting Requests and Intent to File*
- VBA Internet
- VBMS and Share User Guide
- VBA Forms Internet and Intranet websites

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 **Fiduciary Responsibility**

- Fiduciary notify VA of changes
- VA Form 21P-4703, *Fiduciary Agreement*



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 **Field Examiner Responsibility**

- Advise of VA benefits and services
- Explain entitlement to state and local benefits
- Document changes and requests within field examination FELux report
- Provide proper VA forms
- Instruct on completing and submitting forms
- Encourage use of paperless claims submission tools
- Document an Intent to File (ITF)

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 **Available Benefits and Services**

- VBA Internet
  - [VBA Benefit Brochures](#)
  - [VBA Fact Sheets](#)
  - [Applying for Benefits](#)
- Local/State Benefits
  - Internet research
  - VA and external social workers



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**Encourage Paperless Claims**

- [eBenefits](#)
  - Veterans Online Application Direct Connect (VDC)
- [www.vets.gov](http://www.vets.gov)
- Veterans Service Officers (VSOs)
- National Call Center (NCC) 1-800-827-1000
- National Pension Call Center (NPCC)  
1-877-294-6380

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**Proper Forms**

- Must provide correct forms
  - [VBA Internet Forms Page \(external\)](#)
  - [VBA Intranet Forms Page \(internal\)](#)
- Must submit on standard form or Intent to File
- Provide instruction on completing and submitting forms and claims for benefits
- If no form available:
  - FE requests LIE to mail the form
  - Document information on VA Form 27-0820

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**Document and Refer Decrease**

- Document information on VAF 27-0820
- Upload VAF 27-0820 to the eFolder
- Document receipt of information in FELux
- Request LIE refer to station of jurisdiction through email notification

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Receive and Refer Claims

- Date stamp with date of claim
- Mail or fax to evidence intake center
- Document receipt and DOC in FELux
- Request LIE record a note in VBMS

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Intent to File (ITF)

- Discontinued informal claims -March 24, 2015
- ITF creates effective date placeholder until:
  - Substantially complete claim on prescribed form, or
  - One year passes since VA received the ITF
- ITFs apply to claims for:
  - Compensation,
  - Pension,
  - Survivor's Pension, and
  - DIC

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Receive ITFs

- Submit ITFs by either:
  - Complete and sign VA Form 21-0966, *Intent to File a Claim for Compensation and/or Pension, or Survivors Pension, and/or DIC,*
  - Call and verbally make ITF to NCC or NPCC
  - Initiate application electronically
  - Contact VBA personnel
- Communication is adequate if:
  - VA can identify Veteran or claimant
  - Specifies general benefit sought, and
  - Signs VA Form 21-0966 (if how received)

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 **Document and Submit ITFs**

- Inform claimant:
  - VA will establish ITF in system
  - Time limit to complete the claim
  - Will receive a letter explaining next steps
- FE document ITF (specific benefit sought) in FELux and notes LIE Actions to Take
- LIE inputs ITF into VBMS

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 **Common Scenarios**

- Special Monthly Compensation/Pension
  - VA Form 21-2680
- New dependent
  - VA Form 21-686c
- Pension changes (income, net worth, expenses, \$90 Medicaid)
  - VA Form 21P-8416



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 **Questions?**



- Fiduciary Responsibility
- Field Examiner Responsibility
- Available Benefits and Services
- Encourage Paperless Claims
- Proper Forms
- Document and Refer Decrease
- Receive and Refer Claims
- Intent to File (ITF)
- Receive ITFs
- Document and Submit ITFs
- Common Scenarios

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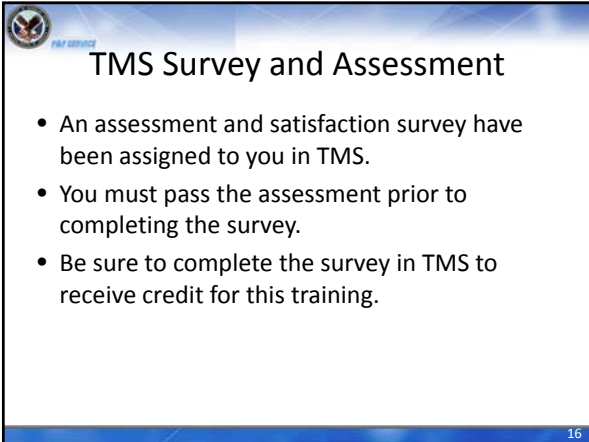
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The slide features a blue header with a circular logo on the left containing an eagle and the text "FBI OFFICE". The main title "TMS Survey and Assessment" is centered in a bold black font. Below the title is a bulleted list of three items. The slide has a blue gradient background and a small "16" in the bottom right corner.

### TMS Survey and Assessment

- An assessment and satisfaction survey have been assigned to you in TMS.
- You must pass the assessment prior to completing the survey.
- Be sure to complete the survey in TMS to receive credit for this training.

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