Specially Adapted Housing (SAH) & Special Home Adaptation (SHA)

Instructor Lesson Plan

Time Required: 1 Hour

**Table of Contents**

[Lesson Description 2](#_Toc54357943)

[Introduction to Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) 4](#_Toc54357944)

[Topic 1: SAH/SHA Claims Overview 6](#_Toc54357945)

[Topic 2: Processing SAH/SHA Basic Eligibility Determinations 10](#_Toc54357946)

[Practical Exercise 13](#_Toc54357947)

[Lesson Review & Wrap-up 13](#_Toc54357948)

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| Lesson Description |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. |
| TMS # | 4557618 |
| Prerequisites | Prior to this lesson, the Veteran Service Representative (VSR) trainee should be familiar with rating decision promulgation and ancillary benefit notification procedures. |
| target audience | The target audience for Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) lesson is VSR, Intermediate Level.Although this lesson is targeted to teach the VSR, Intermediate Level employee, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1 hour |
| Materials/TRAINING AIDS | Lesson materials:* Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) PowerPoint Presentation
* Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) Trainee Handout
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| Training Area/Tools  | The following are required to ensure the trainees are able to meet the lesson objectives: * Classroom or private area suitable for participatory discussions
* Seating, writing materials, and writing surfaces for trainee note taking and participation
* Handouts, which include a practical exercise
* Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials
* Computer with PowerPoint software to present the lesson material

Trainees require access to the following tools: * None
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| Pre-Planning  | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session.
* Become familiar with the content of the trainee handouts and their association to the Lesson Plan.
* Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson.
* Ensure that there are copies of all handouts before the training session.
* When required, reserve the training room.
* Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed).
* Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson.
* This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins.
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| Training Day  | * Arrive as early as possible to ensure access to the facility and computers.
* Become familiar with the location of restrooms and other facilities that the trainees will require.
* Test the computer and projector to ensure they are working properly.
* Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly.
* Make sure that a whiteboard or flip chart and the associated markers are available.
* The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers.
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| Introduction to Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) |
| INSTRUCTOR INTRODUCTION | Complete the following:* Introduce yourself
* Orient learners to the facilities
* Ensure that all learners have the required handouts
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| time required | 5 minutes |
| Purpose of LessonExplain the following: | This lesson is intended to explain the Specially Adapted Housing (SAH) and Special Home Adaptation (SHA) benefit programs and how these claims are processed. This lesson will contain discussions and exercises that will allow the trainee to gain a better understanding of: * The SAH/SHA benefit application process, required forms, and end product (EP) controls
* SAH/SHA benefit eligibility criteria
* Roles and responsibilities of Veterans Service Center (VSC) claims processors
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| Lesson ObjectivesDiscuss the following:Slide 2 Handout 2 | In order to accomplish the purpose of this lesson, the VSR trainee will be required to accomplish the following lesson objectives.TheVSRwill be able to: * Define SAH/SHA benefits and eligibility criteria.
* Identify SAH/SHA prescribed forms and End Product (EP) controls.
* Describe the responsibilities the Veterans Service Center (VSC) and Regional Loan Center (RLC) have in processing SAH/SHA claims.
* Explain the actions needed to make an eligibility determination, including development, rating, and notification requirements.
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| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed.  |
| Motivation | Home renovations and purchasing and installing adaptive equipment for disability can be a huge financial burden to our disabled Veterans who need them. It may also be a financial or physical burden to relocate to a more accessible property or care facility. The Specially Adapted Housing (SAH) and Special Home Adaptation (SHA) benefit programs make accessible housing adaptations and purchasing more affordable for service-connected Veterans and enables them to remain in their own home without compromising their accessibility needs, if they so wish. |
| STAR Error code(s) | Tasks 1, 6, 10, 11 |
| ReferencesSlide 3Handout 2 | Explain where these references are located in the workplace.All M21-1 references are found in the [Compensation and Pension Knowledge Management (CPKM) portal](https://vaww.compensation.pension.km.va.gov/).* [38 CFR §3.809](https://www.ecfr.gov/cgi-bin/text-idx?SID=7999b42c1391c5faf6b3bc41488b9219&node=se38.1.3_1809&rgn=div8) – Specially adapted housing under 38 U.S.C. 2101(a)(2)(A)(i)
* [38 CFR §3.809a](https://www.ecfr.gov/cgi-bin/text-idx?SID=ad275643432556b9dda942343fb89296&mc=true&node=pt38.1.3&rgn=div58) – Special Home adaptation grants under 38 U.S.C. 2101(b)
* [M21-1 III.ii.2.B.1.b.](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014119/M21-1-Part-III-Subpart-ii-Chapter-2-Section-B-Claims-for-Disability-Compensation-and-or-Pension-and-Claims-for-Survivors-Benefits)  Requirements for a Complete Claim Received on or After March 24, 2015
* [M21-1, Part III, Subpart iv, Chapter 6, Section B](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014205/M21-1-Part-III-Subpart-iv-Chapter-6-Section-B-Determining-the-Issues) - Determining the Issues
* [M21-1, Part IX, Subpart i, Chapter 3](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015030/M21-1-Part-IX-Subpart-i-Chapter-3-Specially-Adapted-Housing-SAH-or-Special-Home-Adaptation-SHA-Grants) - Specially Adapted Housing (SAH) or Special Home Adaptation (SHA) Grants
* VA Website: [Disability housing grants for Veterans](https://www.va.gov/housing-assistance/disability-housing-grants/)
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| Topic 1: SAH/SHA Claims Overview |
| Introduction | This topic will allow the trainee to understand at a basic level what SAH/SHA benefits are, who may qualify to receive these benefits and what the claim process is. |
| Time Required | 15 minutes |
| OBJECTIVES/Teaching Points | Topic objectives:* Define SAH/SHA benefits and eligibility criteria.
* Identify SAH/SHA prescribed forms and End Product (EP) controls.
* Describe the responsibilities the Veterans Service Center (VSC) and Regional Loan Center (RLC) have in processing SAH/SHA claims.

The following topic teaching points support the topic objectives: * SAH/SHA benefits help pay towards the costs of home adaptation, or purchasing a home with adaptions, for qualifying service-connected disability
* Veterans and service members with qualifying permanent and/or total disability may qualify to receive SAH/SHA benefits
* Veterans may claim SAH/SHA benefits using VAF 26-4555 or VAF 21-526EZ. The VSC rating activity may also address basic eligibility as a subordinate issue in a claim for compensation.
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| SAH & SHA Benefits*Explain the following:*Slide 4-5Handout 3 | The VA administers two types of grants to assist seriously disabled Veterans and Servicemembers in adapting housing to their special needs:* Specially Adapted Housing (SAH), and
* Special Home Adaptation (SHA) benefits

VA will either pay up 50 percent of the cost of a specially adapted house, the actual costs to adapt a house, or the appraised market value of adapted features already in a purchased home, up to the total maximum allowable by law. SAH/SHA benefits may be granted for a permanent residence that is owned, or *will* be owned, by either the Veteran or a family member. Temporary Residence Adaptation (TRA) grants may also be granted for a Veteran or servicemember who is entitled to SAH/SHA benefits but temporarily resides in a family member’s home requiring adaptations for their disability.The total maximum allowable amount for SAH/SHA and TRA varies for each benefit and cost of living adjustment changes – SAH is the greater benefit. There is also a yearly cap on how many Veterans can receive an SAH grant. This information can all be located on the VA’s Housing Grants website.The *actual amount* of each grant depends on which benefit the claimant qualifies for and what specific adaptations or equipment that individual needs for their type of disability. A claimant may receive up to three awards of SAH or SHA benefits, as long as the *total amount* received doesn’t exceed the maximum amount allowed for that benefit. |
| Eligibility Criteria for SAHSlide 6-7*Handout 3* | The following individuals may qualify for **SAH** benefits:* Veteran or active duty service member who…
	+ Served on or after September 11, 2001, and
	+ Is entitled to compensation for a **permanent** (but not necessarily *total*) disability
		- Incurred on or after September 22, 2001, and
		- Involving loss or loss of use (LOU) of one or more lower extremities necessitating ambulation with assistance (i.e. braces, crutches, cane, wheelchair, etc.).
* Veteran is entitled to compensation under [38 U.S.C. Chapter 11](http://www.law.cornell.edu/uscode/text/38/part-II/chapter-11) for a permanent (but not necessarily *total*) disability due to blindness in both eyes, with visual acuity of 20/200 or less in each eye
* Veteran entitled to compensation for a **permanent *and* total** qualifying condition, or
* Service member on active duty has a **permanent *and* total** qualifying condition incurred or aggravated in the line of duty

Advise trainees that ultimately the Rating VSR will determine whether a claimant has qualifying disability for SAH/SHA benefits. Refer the trainees to the lesson Handout for a list of qualifying disabilities per M21-1 IX.i.3.1.b and 38 CFR §3.809. |
| Eligibility Criteria for SHASlide 8Handout 4 | The following individuals may qualify for **SHA** benefits:* Veteran entitled to compensation for a qualifying condition, or
* Service member on active duty has a qualifying condition incurred or aggravated in the line of duty.

Refer the trainees to the lesson Handout for a list of qualifying disabilities per M21-1 IX.i.3.1.c and 38 CFR §3.809a. |
| **Required Form**Slide 9-10Handout 5 | The prescribed forms for SAH/SHA benefits are VA Form 26-4555, *Application in Acquiring Specially Adapted Housing or Special Home Adaptation Grant* and VA Form 26-4555b, *Veteran/Servicemember’s Supplemental Application for Assistance in Acquiring Specially Adapted Housing.* This training will focus on submission of VAF 26-4555.VAF 26-4555 can be submitted electronically or by scanned document – all information entered on the application form is entered into the SAH/SHA system automatically or manually. VA Form 21-526EZ *Application for Disability Compensation and Related Compensation Benefits* may *also* be accepted as a claim for basic eligibility to either benefit. Additional guidance on acceptable forms for SAH/SHA claims can be found in M21-1 III.ii.2.B.1.b. |
| **Supplemental Claim for SAH/SHA**Slide 10Handout 5 | If SAH/SHA was previously denied, VA Form 26-4555 must also be accompanied by a qualifying request for decision review.* If it wasn’t, send the Veteran a *Request for Application – AMA Review Letter* using the Letter Creator tool.

If the claimant files a legacy appeal document or request for decision review on an SAH/SHA matter other than on basic eligibility, forward the submission to the RLC of jurisdiction for disposition. |
| Claim Process OverviewSlide 11-12Handout 6 | There are two parts to awarding SAH/SHA benefits:* *Basic eligibility* is determined by the Veteran Service Center (VSC) rating activity.
* *Entitlement* is determined by the Loan Guaranty Division’s Regional Loan Center (RLC).

For more information regarding RLC determinations of entitlement and payments of SAH/SHA grants, refer trainees to M21-1 IX.i.3.2. Explain the flowchart on the slide and the three ways a claim for SAH/SHA can be initiated:1. When the Veteran initiates the SAH/SHA claim by sending a prescribed form to the VSC, the VSC will develop, decide and notify the Veteran of the decision of the claim. If eligibility is established by rating, the notification must advise the Veteran to submit VAF 26-4555 to apply for the benefit.

Note: If the Veteran initially submitted VAF 26-4555 to the VSC, claims processors must follow the procedures in M21-1 IX.i.3.3.d to forward a copy to the RLC and add a VBMS claim note before proceeding with development.1. When the Veteran initiates the claim for SAH/SHA by applying online or sending VAF 26-4555 to the RLC, the RLC must verify basic eligibility. If eligibility is *not* established, the VSC must make that determination – additional development may be needed. More on this later.

Once the decision is made and the Veteran notified, the Corporate record is updated and the RLC can continue processing the application form to approve or deny entitlement.1. If the VSC rating activity initiates the claim by addressing SAH/SHA eligibility as a subordinate issue to a claim for compensation benefits, the VSC will notify the Veteran and advise the Veteran to submit VAF 26-4555 to apply for the benefit.
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| Topic 2: Processing SAH/SHA Basic Eligibility Determinations |
| Introduction | This topic will allow the VSR trainee to understand how SAH/SAH basic eligibility determination requests are received at the VSC, determine what development, if any, is needed and the steps to process and respond to the request. |
| Time Required | 30 minutes |
| OBJECTIVES/Teaching Points | Topic objectives:* Explain the actions needed to make an eligibility determination, including development, rating, and notification requirements.

The following topic teaching points support the topic objectives: * Basic eligibility determinations to SAH/SHA originated by an RLC benefit application
* VSC claims processors must take any required development actions *prior* to making the claim ready for decision
* VSC claims processors will promulgate the rating decision and notify the claimant accordingly
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| VSC Eligibility Determination is NeededSlide 13*Handout 8* | The VSC will make an SAH/SHA basic eligibility determination when:* VAF 26-4555 is filed with an RLC and the RLC requests a determination, or
* a claim is filed with the VSC on:
	+ VA Form 26-4555, or
	+ another valid VA form, or
* the VSC grants a benefit that results in a subordinate issue of eligibility to the ancillary benefit of SAH or SHA.
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| EP ControlSlide 14Handout 8 | The controlling EP for SAH/SHA eligibility determinations is:* + EP 290 – *Special Home Adaptation Grant*, or
	+ EP 290 – *Specially Adapted Housing*

**Exception:** Claims received on VAF 21-526EZ at a VSC with other issues will be processed under the appropriate rating EP. |
| Processing SAH/SHA Claims*Discuss the following:*Slide 15-16*Handout 8* | When a claimant seeks to initiate a claim for SAH/SHA by submitting [***VA Form 26-4555***](http://www.vba.va.gov/pubs/forms/VBA-26-4555-ARE.pdf) to the VSC* date stamp the[***VA Form 26-4555***](http://www.vba.va.gov/pubs/forms/VBA-26-4555-ARE.pdf)
* forward the application to the RLC of jurisdiction by
	+ mail, to the address of record, *or*
	+ encrypted e-mail to the appropriate RLC mailbox referenced in [**M21-1, Part IX, Subpart i, 3.3.i**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015030/M21-1%2C%20Part%20IX%2C%20Subpart%20i%2C%20Chapter%203%20-%20Specially%20Adapted%20Housing%20%28SAH%29%20or%20Special%20Home%20Adaptation%20%28SHA%29%20Grants#3i), and
* take any action required by the table below.

| **If basic eligibility to SAH/SHA ...** | **Then ...** |
| --- | --- |
| has previously been established by rating | no EP control or further VSC action is needed; the RLC will make the entitlement determination. |
| has not been previously addressed by rating | make a basic eligibility determination as provided in [**M21-1, Part IX, Subpart i, 3.3.g**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015030/M21-1%2C%20Part%20IX%2C%20Subpart%20i%2C%20Chapter%203%20-%20Specially%20Adapted%20Housing%20%28SAH%29%20or%20Special%20Home%20Adaptation%20%28SHA%29%20Grants#3g).***Important***:  Enter a note in the Veterans Benefits Management System (VBMS) indicating that the [***VA Form 26-4555***](http://www.vba.va.gov/pubs/forms/VBA-26-4555-ARE.pdf) was sent to the RLC. |

Note: It may be necessary to update the corporate record if a previous rating decision establishing eligibility to SAH and/or SHA does not appear in the system. For “backfill” rating decisions, development is generally not needed.Claims processors will:* Establish EP 290 – *Special Home Adaptation Grant or Specially Adapted Housing*
* Issue a §Section 5103 notice, if required
* Refer the claim to the rating activity after either
	+ Development is complete, or
	+ No development is required, *and* the 30-day response period has expired.
 |
| Basic Eligibility Rating DecisionsSlide 17*Handout 9* | When claimed by the Veteran, the rating activity *must* address eligibility to SAH and/or SHA benefits in their decision. The rating activity must also address eligibility to SAH and/or SHA as a subordinate issue in certain claims for service-connected compensation when the evidence shows qualifying disability.The rating activity must explain the basis for the decision in the rating narrative and indicate on the rating code sheet whether eligibility is established or denied, etc. |
| Award PromulgationSlide 18*Handout 10* | Once the rating activity prepares a rating decision addressing basic eligibility to SAH and/or SHA, the authorization activity will:* Generate and authorize a VBMS-A award,
* Send a Redesigned Automated Decision Letter (RADL) or Personal Computer Generated Letter (PCGL) decision notice to the claimant (if SAH and/or SHA is granted, the notification letter should also generally advise the Veteran to submit VAF 26-4555 to apply for the benefit ), and

Per M21-1 III.v.2.B.1.p, decision notices are *not* required for “backfill” rating decisions because they do not constitute a new or free-standing entitlement determination.Note: Due to the automated functionality of the SAH/SHA program, there is no need for the VSC to send a copy of the rating decision to the RLC. |
| DEMONSTRATION | If available, use a live claim to demonstrate the procedures described in this topic. |
| Regional Office Specific Topics | At this time add any information pertaining to:* Station quality issues with this lesson
* Additional State specific programs/guidance on this lesson
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| Practical Exercise |
| Time Required | 5 minutes |
| EXERCISEHandout 12 | Refer the trainees to the Practical Exercise in the lesson Handout. Allow them several minutes to answer the questions and review the answers as a group.If short on time, these questions could also be posed to the class as a whole as a group discussion. These questions can also be inserted throughout the lesson as knowledge checkpoints. Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |

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| Lesson Review & Wrap-up |
| IntroductionDiscuss the following: | The Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) lesson is complete. Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 5 minutes  |
| Lesson Objectives | You have completed the Specially Adapted Housing (SAH) & Special Home Adaptation (SHA) lesson. The trainee should be able to: * Define SAH/SHA benefits and eligibility criteria.
* Identify SAH/SHA prescribed forms and End Product (EP) controls.
* Describe the responsibilities the Veterans Service Center (VSC) and Regional Loan Center (RLC) have in processing SAH/SHA claims.
* Explain the actions needed to make an eligibility determination, including development, rating, and notification requirements.
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