Pension and fiduciary Service

PMC VSR Intermediate Core Course Phase 5: Proficiency Development
Part 1(a): Types of Claims

Fully Developed Claims (FDCs)

Worksheet

April 2024

Quiz: Develop or Exclude?

For each scenario below assume a complete application on the correct FDC application form.

For each scenario, write a D if you would ***develop***, allowing the claim to remain in the FDC program. Write an E if you would ***exclude*** the claim from the FDC program because additional development is required.

| Scenario | Develop (D) or Exclude (E) |
| --- | --- |
| 1. The claim requires a character of discharge determination.
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| 1. Records in the custody of a Veteran’s Reserve/Guard unit.
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| 1. VA requires independent verification of unearned income from FTI received for upfront verification.
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| 1. The claim requires additional medical evidence in the custody of VAMC for service-connected death and there is no 4142 submitted.
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| 1. The claimant or POA submits additional evidence.
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Practice FDCs Worksheet

For each claim, answer the questions below. Include references to the M21-1 and sections of the application forms in your explanations.

Claim 1

1. Does the application meet the FDC criteria for Veterans non Service-connected pension benefits? If no, what criteria does it not meet?
2. Does the application meet the FDC criteria for DIC, survivors’ pension, and/or accrued benefits? If no, what criteria does it not meet?
3. Should the application be excluded from the FDC program? If yes, why?

Claim 2

1. Does the application meet the FDC criteria for Veterans non Service-connected pension benefits? If no, what criteria does it not meet?
2. Does the application meet the FDC criteria for DIC, survivors’ pension, and/or accrued benefits? If no, what criteria does it not meet?
3. Should the application be excluded from the FDC program? If yes, why?