Pension and fiduciary service

PMC VSR Advanced Core Course

Phase 5: Stages of a Claim
 Part 1: Determine Eligibility

Presumptive Criteria for Permanent and Total (P&T) Disability

Appendix A

January 2023

Practice Exercise Worksheet

Read the following scenarios and answer the following questions. Assume all Veterans have qualifying service and meet all income and net worth requirements.

**Scenario 1:** VA received an initial application for Veteran Nate Barcalow requesting nonservice connected pension. Mr. Barcalow is 59 years old, lives at home, has claimed a mental condition, and is receiving supplemental security income (SSI). The PMC VSR confirmed that Mr. Barcalow is receiving SSI by verifying it through VBMS.

**Question 1:** Is Mr. Barcalow presumed to be permanently and totally disabled? If so, which criteria did they satisfy?

**Answer:**

**Scenario 2:** The VA claims intake center received VA Form 21P-527EZ and VA Form 21-2680 from Veteran Alejandro Ortiz. Mr. Ortiz is 58 years old, lives at home, and last worked in 2018. SSA data inquiry does not show Mr. Ortiz is receiving any benefits.

**Question 2:** Is Mr. Ortiz presumed to be permanently and totally disabled? If so, which criteria did they satisfy?

**Answer:**

**Scenario 3:** Gulf War Era Veteran John Davidson is 50 years old and, filed a claim for Veterans Pension benefits. He is claiming aid and attendance as a resident in Maplewood Center Nursing Home in West Allis, WI. Mr. Davidson is not receiving any SSA benefits.

**Question 3:** Does the Veteran satisfy presumptive criteria for P&T disability? If so, which criteria did they satisfy?

 **Answer:**

**Scenario 4:** On May 15, 2020, 63-year-old Veteran, Alicia Ward, submits a claim for benefits on VA Form 21P-527EZ and a copy of the SSI letter awarding her benefits verifying her only income.

**Question 4:** Does the Veteran satisfy presumptive criteria for P&T disability? If so, which criteria did they satisfy?

 **Answer:**

**Scenario 5:** Bob Freed, a 39-year-old Veteran with 6 years of Gulf War service, submitted a VA Form 21P-527EZ and stated that he can only work sparingly as a skate sharpener. He reports $500 a month in wages. He also provides medical evidence from his doctor regarding his back problems that prevent him from working enough to support himself. Mr. Freed is not receiving any benefits from the SSA.

**Question 5:** Does the Veteran satisfy presumptive criteria for P&T disability? If so, which criteria did they satisfy?

 **Answer:**

**Scenario 6:** Veteran Jayne Howard is applying for Veterans pension. She submits VA Form 21-527EZ as well as a Care Expense Statement showing she is in an assisted living facility and being covered by Medicaid. Evidence shows she is 59 years old and not receiving any SSA benefits.

**Question 6:** Does the Veteran satisfy presumptive criteria for P&T disability? If so, which criteria did they satisfy?

 **Answer:**