Pension and fiduciary service

PMC VSR Advanced Core Course
Phase 6: Practical Application and Experience

Process Original Survivors Pension

 **Appendix A**

June 2024

Example Claim 1 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On November 13, 2021, VA receives a VA Form 21P-534EZ, from the surviving spouse of Veteran Jones. The spouse checked only Survivors Pension. The application claims the Veteran served honorably in the Navy from 3/14/52 until 3/15/54. They married on 6/3/54 and lived continuously with each other until the Veteran died on June 23, 2020. She states each was only married once and she has not remarried. She did not claim Special Monthly Pension and her only income is $250 monthly in Social Security retirement income. She has no net worth. Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing he passed away from heart disease. A copy of the Veteran’s DD Form 214 showing his honorable discharge from the Navy on 3/15/54 was also received. FTI and SSA confirm the spouse’s income report.

1. Is there sufficient information to decide the claim?
2. Does the claim require a rating decision?
3. Does Ms. Jones qualify for Survivors Pension, and if so, what rate of pension would she receive?

Example Claim 2 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On October 13, 2021, VA receives a VA Form 21P-534EZ, from the surviving spouse of Veteran Jack. Deb, the spouse, checked only Survivors Pension. The application claims the Veteran served honorably in the Navy from 3/14/55 until 3/15/57. They married on 6/3/57, and lived continuously with each other until the Veteran died on July 3, 2021. She states each was only married once and she has not remarried. She did not claim Special Monthly Pension and her only income is $900 monthly in Social Security retirement income. She has no net worth.

Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing he passed away from lung disease. A copy of the Veteran’s DD Form 214 showing his honorable discharge from the Navy on 3/15/57 was also received. FTI and SSA confirm the spouse’s income report.

1. Is there sufficient information to decide the claim?
2. Does the claim require a rating decision?
3. Does Deb qualify for Survivors Pension, and if so, what rate of pension would she receive?

Example Claim 3 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On December 13, 2021, VA receives a VA Form 21P-534EZ, from the surviving child of Veteran Don. Don Jr., the child, checked only Survivors Pension. The application claims the Veteran served honorably in the Navy from 5/16/67 to 5/15/69. The child’s date of birth is July 12, 1970, is the biological child of the Veteran, and has not married. He is claiming Special Monthly Pension and his only income is $150 monthly in Social Security retirement income. He has no net worth. Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing he passed away from CAD. A copy of the Veteran’s DD Form 214 showing his honorable discharge from the Navy on 5/15/69 was also received. FTI and SSA confirm the income report.

1. Is there sufficient information to decide the claim?
2. Does Don qualify for Survivors Pension, and if so, what rate of pension would he receive?

Example Claim 4 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On July 23, 2021, VA receives VA Form 21P-534EZ, from the surviving spouse of Veteran Mark. The spouse checked Survivors Pension. The application claims the Veteran served honorably in the Army from 2/6/51 to 1/11/53. They married on 6/3/53 and lived continuously together until the Veteran died on July 3, 2021. She states each was married once and she has not remarried. She is claiming Special Monthly Pension (SMP) and her only income is $850 monthly in Social Security retirement and $500 in SBP. She has no net worth and is claiming to pay $125 monthly SMIB and $1,225 monthly nursing home expenses and is Medicaid covered. Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing he passed away from CAD, and a copy of the Veteran’s DD Form 214 showing his honorable discharge from the Army on 5/15/71. His entrance date was 2/6/51 and his last command shows he was in RVN. FTI and SSA confirm the income report.

1. Is there sufficient information to decide the claim?
2. Does Lisa qualify for Survivors Pension, and if so, what rate of pension could she receive?

Example Claim 5 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On June 30, 2021, VA receives VA Form 21P-534EZ, from the surviving spouse of Veteran Laura. Steve, the spouse, checked Survivors Pension. The application claims the Veteran served honorably in the Army from 2/6/65 to 1/11/68. They married on 6/3/70 and lived continuously together until the Veteran died on May 8, 2021. He states each was married once and he has not remarried. He is claiming SMP and his only income is $500 monthly in Social Security retirement. He has no net worth and is claiming to pay $125 monthly SMIB.

Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing she passed away from a pulmonary embolism, and a copy of the Veteran’s DD Form 214 showing her honorable discharge from the Army on 1/11/68. Her last command shows she was in RVN. FTI confirms the Social Security income and reports $749 in interest income for the last tax year.

1. Is there sufficient information to decide the claim?
2. Does Steve qualify for Survivors Pension, and if so, what rate of pension could he receive?

Example Claim 6 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On September 7, 2021, VA receives VA Form 21P-534EZ, from the surviving spouse of Veteran Nora. Dan, the spouse, checked Survivors Pension. The application claims the Veteran served honorably in the Army from 3/6/67 to 4/11/69. They married on 6/30/70 and lived continuously together until the Veteran died on January 8, 1981. He states each was married once but he remarried. He stated that second marriage ended in divorce on 2/14/95. He is claiming SMP and his only income is $650 monthly in Social Security retirement. He has no net worth.

Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing she passed away from a cardiac arrest, and a copy of the Veteran’s DD Form 214 showing her honorable discharge from the Army on 4/11/69. Her last command shows she was in RVN. FTI and SSA confirms the Social Security income.

1. Is there sufficient information to decide the claim?

Example Claim 7 Practice Exercise

**Directions**: Review the example claim. Use the job aids listed on the trainee guide to help you answer the questions. **Provide a rationale for each answer.**

On January 7, 2022, VA receives VA Form 21P-534EZ, from the surviving spouse of Veteran Lola. Ed, the spouse, checked Survivors Pension. The application claims the Veteran served honorably in the Army from 7/10/71 to 4/11/95. They married on 6/30/70 and lived continuously together until the Veteran died on October 8, 1999. He states each was married once and he has not remarried. He is claiming SMP and his only income is $650 monthly in Social Security retirement. He does report owning a bank account worth $650,000.

Evidence was submitted with the application for benefits including a copy of the Veteran’s death certificate showing she passed away from a stroke, and a copy of the Veteran’s DD Form 214 showing her honorable discharge from the Army on 4/11/95. Her last command shows she was in RVN. FTI and SSA confirms the Social Security income.

1. Is there sufficient information to decide the claim?
2. Does Ed qualify for Survivors Pension, and if so, what rate of pension could he receive?