Pension and Fiduciary Service

PMC VSR Intermediate Core Course  
Phase 5: Proficiency Development  
Part 1(c): Income Eligibility

Establish Periods for Calculating Income

Appendix A

July 2024

Establishing Dates for Calculating Income Worksheet

Part A: Initial Year Beginning and Ending Dates

Answer the questions below for each example claim provided by the instructor.

* Claim 1: Veterans Pension
  + What is the beginning date of the initial year?
  + What is the ending date of the initial year?
* Claim 2: Survivors Pension
  + What is the beginning date of the initial year?
  + What is the ending date of the initial year?

Part B: Overlap Period Beginning and Ending Dates

Answer the questions below for each example claim provided by the instructor.

* Claim 1: Veterans Pension
  + **What are the dates of the initial year?**
  + **What are the dates of the first calendar year?**
  + **What are the dates of the overlap period?**
  + What are the dates of the “A” period?
  + What are the dates of the “B” period”?
* Claim 2: Survivors Pension
  + **What are the dates of the initial year?**
  + **What are the dates of the first calendar year?**
  + **What are the dates of the overlap period?**
  + What are the dates of the “A” period?
  + What are the dates of the “B” period”?

Part C: Beginning and Ending Dates of the Second 12-Month Period

Answer the questions below for each example claim provided by the instructor.

* Claim 1: Veterans Pension
  + What is the beginning date of the second 12-month period?
  + What is the ending date of the second 12-month period?
* Claim 2: Survivors Pension
  + What is the beginning date of the second 12-month period?
  + What is the ending date of the second 12-month period?