



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 1: Determine Eligibility

Lesson 16: Establish Periods for Calculating Income

Appendix A

October 28, 2016

Version 1.0

Lesson 16: Establish Periods for Calculating Income
Appendix A

Establishing Dates for Calculating Income Worksheet

Part A: Effective Date and Payment Date

Use the Effective Date EPSS to answer the questions below for each example claim. In the EPSS:

1. Select the appropriate benefit from the Effective Dates by Specific Benefit menu on the left side of the EPSS.
 2. Select the correct option for an **original** claim using the instructions on the right side of the EPSS to guide you.
 3. Select the effective date and payment date using the information in the EPSS for the example claim data.
-
- Claim 1: Veterans Pension (referred to as Disability Pension in EPSS)
 - What is the effective date?
 - With that effective date, what would be the payment date?
 - Claim 2: Survivors Pension (referred to as Death Pension in EPSS)
 - What is the effective date?
 - With that effective date, what would be the payment date?

Part B: 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 C: Overlap Period Beginning and Ending Dates

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

- Claim 1: Veterans Pension

Lesson 16: Establish Periods for Calculating Income
Appendix A

- 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 D: 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?