



## PENSION AND FIDUCIARY SERVICE

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

# **Lesson 19: Determine Income Status**

## Appendix A

October 28, 2016

Version 1.0

**Lesson 19: Determine Income Status**  
**Appendix A**

---

**Determine Income Status Worksheet**

Refer to the **Income and Net Worth Status** job aid for applicable references.

**Part A: Claim 1—Income and Expenses**

**Effective Date:**

**Payment Date:**

**Countable Income:**

Description	Date	Recipient	Amount	Classification

**Final Expenses:**

Description	Amount Paid	Date Paid	Provider	Paid For

**Lesson 19: Determine Income Status**  
**Appendix A**

---

**Educational Expenses:**

Description	Amount Paid	Date Paid	Provider	Paid For

**Medical Expenses:**

Description	Amount Paid	Date Paid	Provider	Paid For	UME or CME?

**Part B: Claim 1—Perform Upfront Verification**

Use Claim 1 provided by the instructor. Refer to the following job aids as needed:

- **Upfront Verification**
- **FTI Income Reference List**

Perform the following activities:

1. Check the "Veteran" or "S/P" tab found by selecting the pending EP for FTI listed benefit information.
2. Match the source of income and the income types on the IRS SHARE screen to the source of income and the income types listed on the **FTI Income Reference List** job aid.
3. Determine whether the source of income and the type of income reported in the IRS screen is countable for purposes of income verification by using the **FTI Income Reference List** job aid.

## **Lesson 19: Determine Income Status**

### **Appendix A**

---

4. Check the Veteran" or "S/P" tab found by selecting the pending EP for FTI listed benefit information.
5. Determine earned income information provided by SSA by using the SSA section of the **FTI Income Reference List** job aid.
6. Add the IRS and SSA benefit information that is countable for purposes of upfront verification.
7. Subtract the calculated medical expenses (identified previously on the VBMS-A Financial Decision Detail sub-page) to obtain the upfront verification IVAP.

*(Use this part of the worksheet to show your work)*

**Lesson 19: Determine Income Status**  
**Appendix A**

**Part C: Claim 2—Income and Expenses**

Effective Date:

Payment Date:

Countable Income:

Description	Date	Recipient	Amount	Classification

Final Expenses:

Description	Amount Paid	Date Paid	Provider	Paid For

**Lesson 19: Determine Income Status**  
**Appendix A**

---

**Educational Expenses:**

Description	Amount Paid	Date Paid	Provider	Paid For

**Medical Expenses:**

Description	Amount Paid	Date Paid	Provider	Paid For	UME or CME?