

PMC VSR Intermediate Core Course

**Phase 5.1(c): Knowledge Check Prep Worksheet**

**Appendix A**

June 2024

**Part 1 – Periods for Calculating Income**

**Directions**: Read each item and decide which statement is the most accurate.

1. Which statement is true?
2. When developing an initial claim received after a period of non-entitlement, request income information from the date of entitlement through January 31 of the year during which entitlement arose **and** expected income for the same calendar year
3. When developing an initial claim received after a period of entitlement, request income information from the date of entitlement through January 31 of the year during which entitlement arose **and** expected income for the next calendar year
4. When developing an initial claim received after a period of non-entitlement, request income information from the date of entitlement through December 31 of the year during which entitlement arose **and** expected income for the next calendar year.

**Answer**:

1. Which statement is true?
2. When developing a supplemental claim received after a period of entitlement, request income information from the date of entitlement through December 31 of the year during which entitlement arose **and** expected income for the same calendar year
3. When developing a supplemental claim received after a period of non-entitlement, request income information from the date of entitlement through December 31 of the year during which entitlement arose **and** expected income for the next calendar year
4. When developing a supplemental claim received after a period of non-entitlement, request income information from the date of entitlement through the end of the month during which entitlement arose **and** expected income for that year.

**Answer**:

1. VA receives an original for Current-Law Pension from Hannah, and you determined that the date of entitlement is July 18, 2021; therefore, the initial annualization period would extend from what date(s)?

**Answer**:

1. VA receives a supplemental claim for Current Law pension from Maggie, and it is determined that the date of entitlement is June 11, 2022; therefore, the initial annualization period would extend from what date(s)?

**Answer**:

1. VA received a claim from Jack Veteran on April 19th, 2022, for Veterans Pension. You must determine the initial year. What would the initial year be?

**Answer**:

1. Janice, a surviving spouse filed a claim for Survivors Pension on November 17th, 2021. A review of the record shows that the Veteran died March 5, 2020. What would the initial year be?

**Answer**

1. Larry is a Veteran with no dependents and is permanently and totally disabled effective March 15, 2023.  After reviewing his records, you determined that the Veteran is receiving monthly recurring income as of March 15, 2023. You also determined that the Veteran received irregular income between March 15, 2023, and April 1, 2024, how would you count the income for the period, and from what period would you count all medical expenses when determining the IVAP?

**Answer**:

1. Amy, a surviving spouse is entitled to Survivors Pension with an effective date of March 13, 2022.  The award is payable from April 1, 2022.  The award is based on IVAP of $0.  The surviving spouse receives a retirement check for $1000 on July 9, 2022.  It represents a $500 retroactive check and the regular $500 check for July.  The surviving spouse expects to receive $500 each month in the future. For what period would you count this income and how?

**Answer**:

**Part 2 – Types of Countable Income**

**Directions**: Review each item in the chart and decide whether to the income is Countable = C, or not countable NC for pension purposes.

|  |  |
| --- | --- |
| **Type of Income** | **C/NC** |
| Jasmine indicated that she provides room and board to people needing a home. A review of the records shows that the monies received are gratuitous. **Countable or Not Countable income?** |  |
| Charlie Beneficiary receives regular cash contributions for the purpose of paying for the maintenance. **Are the contributions considered countable income?** |  |
| Alice, a surviving spouse has a joint bank account with a niece Cathy. The account incurs interest. **Is the interest countable income**? |  |
| Sally Beneficiary is entitled to receive a retirement income, but waives the income, and it is an amount that would be received if she had not waived the income. **Countable or Not Countable income?** |  |
| Janice, a surviving spouse, received the Social Security lump-sum death benefit. Countable or not countable. **Countable or Not Countable income?** |  |
| Jim Veteran received pension benefits that were paid as an accrued amount. **Countable or Not Countable income?** |  |
| Alice, a surviving spouse is in receipt of the Medal of Honor Pension (MOHP). **Countable or Not Countable income?** |  |
| Agnes, the surviving spouse received accrued VA benefits. **Countable or Not Countable income?** |  |
| Grant Veteran is married and in receipt of VA pension.  The Veteran’s spouse receives a stipend from VA Program of Comprehensive Assistance for Family Caregivers (PCAFC). **Countable or Not Countable income?** |  |

**Part 3 – Calculations for Determining Deductible Medical Expenses**

**Directions**: Review each scenario and provide a response.

**Scenario 1:**

VA discontinued a Jim Veteran’s pension award in 2021 and overpaid the Veteran $3000 during 2021. VA later recoups $1,000 of the $3,000 pension overpayment when the Veteran started receiving compensation from which the overpayment was recovered. During 2022, the Veteran reported payment of previously unreported 2021 medical expenses.  If accepted, these expenses would eliminate the $3000 overpayment and generate a $700 retroactive payment.

**Explain actions needed and what results you should see.**

**Scenario 2:**

Hank Veteran is married. He is entitled to A&A. In February 2022, he claimed payment of UMEs of $7,000. Provide the MAPR and outline the calculation for determining the deductible medical expenses.

**Record your results.**

**Scenario 3:**

Mike is a Veteran with no dependents. He is in receipt of Social Security in the amount of $780 a month. He has applied for Veteran’s pension on May 8th, 2019, he claimed payment of UMEs of $5,000. Provide the MAPR and outline the calculation for determining the deductible medical expenses.

**Record your results.**

**Part 4: IVAP**

**Directions:** Read each scenario and provide a response.

**Determine IVAP**

Charles Veteran was in receipt of disability compensation of $2000 per month before passing away on June 10th, 2022. The surviving spouse files a claim for Survivors Pension on November 8th, 2022. After reviewing the claim, you see that she is in receipt of $850.00 per month from SSA. She also receives $450.00 from a retirement account. Her medical bills are $600 monthly, and she has no dependents.

**Determine IVAP**

Martha, filed a claim for Survivors Pension on July 9th, 2023. You discovered that the Veteran was in receipt of disability compensation in the amount of $1750 per month before passing away on August 10th, 2022. Martha, is in receipt of SSI in the amount of $1250, and her medical expenses are $500 per month. She has a dependent child, age 15, who is helpless and lives with her.

**Determine IVAP**

Shirley, is filed for Veteran’s Pension on February 22, 2024. You discovered that she is in receipt of SSA in the amount of $900 per month. Shirley is also housebound. She has no dependents, her medical bills are $1300 per month, but she is in receipt of retirement check of $1650.

**Part 5: Understanding Net Worth**

Read each scenario and provide a response:

**Scenario 1:**

Florida Veteran has a running award since 2019. She inherited a property that she rents out. When she first submitted her claim for VA pension benefits, she noted that the property is $50,000. The property is now worth $150,000. She submitted a [***VA Form 21P-8049, Request for Details of Expenses***](http://www.vba.va.gov/pubs/forms/VBA-21P-8049-ARE.pdf), on May 9, 2023, and reported that the current value of the home. She stated that she no longer rents out the home.

**Explain actions needed and the result:**

**Scenario 2:**

Maggie Veteran has a running award since 2020. She inherited a property that she keeps vacant for personal reasons. When she first submitted her claim for VA pension benefits, she noted that the property is $120,000. The property is now worth $220,000. She submitted a [***VA Form 21P-8049, Request for Details of Expenses***](http://www.vba.va.gov/pubs/forms/VBA-21P-8049-ARE.pdf), on September 15th, 2023, and reported that the current value of the home. But stated that she will soon deed the property to her nephew, John by the end of the week. She also indicated that she does not stand to gain anything monetarily from this home, only a happy heart as it will stay in the family.

**Explain actions needed and the result:**