Pension and fiduciary service

PMC VSR Advanced Core Course Phase 5, Part 1(c): Income Eligibility

Phase 5, Part 1(c) Knowledge Check Preparation

Appendix B: Worksheet

December 2021

Phase 5, Part 1(c) Worksheet

Part A: What’s the Date?

Using Appendix A, determine the period for establishing entitlement.

1. Based on all the information provided in the example claim, what is the entitlement date/effective date for the claim? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Now that you have established the effective date. Provide the dates for the following periods:
   * Beginning of “A” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of “A” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Beginning of overlap period or “B” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of overlap period or “B” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Beginning of “C” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * End of the “C” period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Part B: Income and Expenses

Use Appendix A to assist in answering the questions:

1. List the countable income and classification in the table:

Countable Income

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Recipient | Amount | Classification |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. List the medical expenses that are countable in the table:

**Medical Expenses**

| **Description** | **Amount Paid** | **Date Paid** | **Provider** | **Paid For** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Part C: Net Worth Status

Use Appendix A to determine the Veteran’s net worth.

1. What are the Veteran’s assets? \_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What is the Veteran’s IVAP? \_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_
3. What is the Veteran’s resulting net worth (input in VBMS-A)?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Is the Veteran over the bright line limit for 2021? \_\_\_**\_\_\_\_**\_\_\_\_\_\_\_\_\_