PENSION AND FIDUCIARY Service

PMC VSR Core Course

Process a Month of Death (MOD) Claim Checklist

Job Aid

March 2023

This job aid provides a checklist to help you as a new PMC VSR process a Month of Death (MOD) claim. By checking off each item as you review or screen it on the claim form, you will be more confident that you have processed the claim correctly.

Remember, these steps are broken out into distinct tasks for instructional purposes only; an experienced PMC VSR may complete many of the tasks simultaneously.

| ü | Action | Notes |
| --- | --- | --- |
| **Part 1** | Recognize indicators of MOD claim(refer to **Claim Types** job aid) |  |
|  | * VA Form 21P-534EZ (Application DIC, Death Pension, and/or Accrued Benefits)

*Remember MOD benefit may be requested in conjunction with Survivors Benefits application or may be requested separately* |  |
|  | * **Phone call (VA Form 27-0820)**
 |  |
|  | * CESTed: EP codes 140, 190, or 290
 |  |
| **Part 2** | Confirm claim characteristics assigned by claims assistant |  |
|  | * Verify claim is substantially complete
 |  |
|  | * Verify claim type
 |  |
|  | * Verify date of claim
 |  |
|  | * Verify POA
 |  |
|  | * Verify EP Code
 |  |
|  | * Verify payee code 10
 |  |
| **Part 3** | Screen claim for lack of eligibility (to determine if claim may be denied without development) |  |
|  | * Is the claimant the surviving spouse?
 |  |
|  | * Has spouse already received MOD payment through automation?
 |  |
|  | * + Was Veteran being paid Compensation or Pension benefit at time of death?
	+ If not, was there a claim pending at death?

NOTE: If a claim is pending, refer to applicable job aids to complete the pending claim first, in order to finish processing MOD claim. |  |
| **Part 4** | Identify Missing Information/Evidence *(if necessary)* |  |
|  | * Dependency related claim information/evidence
 |  |
|  | * + Refer to **Dependency Eligibility: Spouse** job aid
 |  |
|  | * + If Veteran had a claim pending that required development, see applicable job aids
 |  |
| **Part 5** | Develop for Missing Information/Evidence *(if necessary)* (refer to **Develop for Missing Information/Evidence** job aid) |  |
|  | * Develop for dependency related claim information/evidence (Refer to **Contested Claims** job aid, if applicable)
 |  |
| **Part 6** | Determine entitlement to MOD benefit |  |
|  | * Is the claimant the surviving spouse?
 |  |
|  | * Has spouse already received MOD payment through automation?
 |  |
|  | * + Was Veteran being paid Compensation or Pension benefit at time of death?
	+ If not, was there a claim pending at death?
 |  |
|  | * Verify claimant information
	+ Name
	+ Address
	+ SSN
	+ DOB
 |  |
|  | * Consider any additional information/evidence (if necessary)
	+ Verify Veteran service requirements
		- Length of service
		- Wartime service
		- Character of discharge
	+ Confirm dependency eligibility for spouse of Veteran
 |  |
| **Part****7** | Determine if claim should be submitted to rating activity |  |
|  | NOTE: The MOD claim generally does not require rating * Rating would only apply if there was a claim pending at death that may affect the MOD payment and requires a rating decision
 |  |
|  | * Refer to **Ready to Rate** job aid
 |  |
| **Part****8** | Decide the award action for MOD benefit *Remember MOD cannot be paid as an accrued benefit (Refer to* ***Accrued Benefits*** *job aid, as needed)* |  |
|  | * If granting the benefit, refer to **Processing a Grant of Benefits** job aid
 |  |
|  | * If denying the benefit, refer to **Processing a Denial of Benefits** job aid
 |  |
|  | * Whether granting, denying or adjusting, refer to **Annotate Award** **Checklist** job aid to document your PMC VSR notes about deciding the award action in the applicable systems
 |  |
| **Part 9** | Prepare a decision notification for MOD benefit  |  |
|  | Part A* If granting benefit, refer to **Processing a Grant of Benefits** job aid
 |  |
|  | * + Create decision notice
 |  |
|  | * + Determine contents of notification letter
 |  |
|  | Part B* If denying benefit, refer to **Processing a Denial of Benefits** job aid
 |  |
|  | * + Create decision notice
 |  |
|  | * + Determine contents of notification letter
 |  |
| **Part 10** | Submit the claim to the Authorizer |  |
|  | * Whether granting, denying, or adjusting refer to **Annotate the Award Checklist** job aid to document your final PMC VSR notes about the award in the applicable system
 |  |
|  | * Save completed work, including decision notice, in appropriate locations according to local procedures
 |  |
|  | * Submit the claim and decision notice for review by Authorizer according to local procedures
 |  |