



## PENSION AND FIDUCIARY SERVICE

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

# **Lesson 25: Determine Burial Benefits Eligibility**

Appendix A

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**Lesson 25 Prerequisites**

**Description**

This Appendix A lists the references according to the prerequisite learning objectives. The reference types include the corresponding lesson title, job aids, 38 Code of Federal Regulations (CFR) and M21-1 Adjudication Procedures Manual.

**Recognize indicators of Veterans Pension claim**

Reference Type	Reference Name
Lesson	Phase 4, Lesson 2: <i>PMC VSR Overview Types of Pension Claims and Claims Recognition</i>
Job Aids	<b>Claim Types</b> job aid

**Determine whether the application for benefits is complete or incomplete**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 1: <i>Complete and Incomplete Applications for Benefits</i>
Job Aids	None
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 I.1.B (Duty to Notify Under 38 U.S.C. 5102 and 5103)</li> <li>• M21-1 III.ii.2.B.1 (Applications for Disability Compensation and/or Pension, and Applications for Survivors Benefits)</li> <li>• M21-1 III.ii.2.C (Informal Claims Received Prior to March 24, 2015, Communication of an Intent to File [ITF], and Requests for an Application)</li> </ul>

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**Determine if a claim can be processed as a Fully Developed Claim (FDC)**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 2: <i>Fully Developed Claims (FDCs)</i>
Job Aids	None
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 III.i.3.A (General Information About the Fully Developed Claim [FDC] Program)</li> <li>• M21-1 III.i.3.B.2 (Excluding Claims From the FDC Program)</li> <li>• M21-1 III.i.3.B.3 (Development the Department of Veterans Affairs [VA] Undertakes in Connection with FDCs)</li> </ul>

**Confirm special claim types**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 3: <i>Flash, Expedited (Priority), Previous, Dual, or Reopened/New Claims</i>
Job Aids	<b>Pension Systems and Applications</b> job aid
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 III.ii.1.D (Claims That Require Priority Processing)</li> <li>• M21-1 III.iii.1.D.1.b (Claimant Flashes)</li> <li>• M21-1 III.iv.2.B.3.e (Definition: New and Material Evidence)</li> <li>• M21-1 I.5.A.2.b (Overview of the Appeal Process)</li> </ul>

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**Determine if an appeal is pending**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 3: <i>Flash, Expedited (Priority), Previous, Dual, or Reopened/New Claims</i>
Job Aids	<b>Pension Systems and Applications</b> job aid
38 CFR and M21-1 Manual	See Phase 5, Part 1, Lesson 3 above for references

**Confirm the Date of Claim (DOC) is correct**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 4: <i>Date of Claim</i>
Job Aids	None
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 III.ii.1.B (Mail Management)</li> <li>• M21-1 III.ii.1.C (Initial Screening Policies)</li> <li>• M21-1 III.ii.2.B.3.c (Determining the Proper DOC for Claims Establishment Purposes)</li> <li>• M21-4 Appendix B (End Product Codes and Work-Rate Standards for Quantitative Measurements)</li> </ul>

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**Establish Veteran status**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 10: <i>Establish Veteran Status</i>
Job Aids	None
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 III.ii.6.A (Establishing Veteran Status)</li> <li>• M21-1 III.ii.6.A.1.b (Definition: Active Service)</li> <li>• M21-1 III.ii.6.A.1.c (Definition: Qualifying Service)</li> <li>• M21-1 III.ii.6.A.1.d (Primary Eligibility Criteria for Benefits)</li> <li>• M21-1 III.ii.6.A.1.e (Secondary Eligibility Criteria for Benefits)</li> <li>• M21-1 III.ii.6.A.1.f (Deciding Claims Based on Qualifying Service)</li> <li>• M21-1 III.ii.6.A.1.h (Characterizing the Service of Academy Attendees)</li> <li>• M21-1 III.ii.6.A.2 (ADT or IADT Service in the Reserves or National Guard)</li> <li>• M21-1 III.ii.6.A.3 (Duty Status and Eligibility of Reservists)</li> <li>• M21-1 III.ii.6.B (Service Requirements and Verification of Eligibility)</li> <li>• M21-1 III.ii.6.B.1.a (Requirement for a Minimum Period of Active Duty)</li> <li>• M21-1 III.ii.6.B.1.b (Entitlement to VA Benefits When the Minimum Active Duty Requirements Are Not Met)</li> <li>• M21-1 III.ii.6.B.1.c (Exceptions to the Minimum Active Duty Requirement)</li> <li>• M21-1 III.ii.6.B.2.a (Verifying Service and Character of Discharge)</li> <li>• M21-1 III.ii.6.B.3.a (Acceptable Forms of Evidence of Qualifying Service)</li> <li>• M21-1 III.ii.6.B.3.b (Verification of Service Using the VID)</li> </ul>

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	<p>Tab in Share)</p> <ul style="list-style-type: none"> <li>• M21-1 III.ii.6.B.3.c (Acceptable Alternative Evidence for Verification of Service)</li> <li>• M21-1 III.ii.6.B.4.d (Eligibility Determinations for Pension)</li> <li>• M21-1 III.v.1.A.1 (General Information on Administrative Decisions)</li> <li>• M21-1 III.v.1.A.3.a (Guidelines for Preparing Administrative Decisions)</li> <li>• M21-1 III.v.1.A.3.b (Process for Electronically Signing an Administrative Decision in VBMS)</li> <li>• M21-1 III.v.1.A.3.d (Sample Format for an Administrative Decision)</li> <li>• M21-1 III.v.1.B (Statutory Bars to Benefits and Character of Discharge [COD])</li> <li>• M21-1 III.v.1.B.1.a (Thresholds for Benefit Eligibility)</li> <li>• M21-1 III.v.1.B.1.b (When DoD's Characterization of Service is Binding on VA)</li> <li>• M21-1 III.v.1.B.1.c (When a COD Determination is Necessary)</li> <li>• M21-1 III.v.1.B.1.d (When a COD/Statutory Bar Determination is Not Necessary)</li> <li>• M21-1 III.v.1.B.1.e (Responsibility for Collecting Evidence)</li> <li>• M21-1 III.v.1.B.1.g (Overview of the COD/Statutory Bar Determination Process)</li> <li>• M21-1 III.v.1.B.1.i (COD/Statutory Bar Determination Template)</li> <li>• M21-1 V.i.1.2 (Service Requirement for Pension Eligibility)</li> <li>• M21-1 III.iii.1.C.2.d (Final Notice to Claimants That VA is Unable to Obtain Relevant Federal Records)</li> <li>• 38 CFR 3.2 (Periods of war.)</li> </ul>

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Reference Type	Reference Name
	<ul style="list-style-type: none"> <li>• 38 CFR 3.12 (Character of discharge.)</li> <li>• 38 CFR 3.12(a) (Minimum active-duty service requirement.)</li> </ul>

### Determine dependency eligibility for a spouse of a Veteran

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 12: <i>Determine Dependency Eligibility: Spouse</i>
Job Aids	<ul style="list-style-type: none"> <li>• <b>Dependency Eligibility Requirements</b> job aid</li> <li>• <b>Dependency Eligibility: Spouse</b> job aid</li> </ul>
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• M21-1 III.iii.5.A (General Information on Relationship and Dependency)</li> <li>• M21-1 III.iii.5.B (Establishing the Validity of a Marriage for VA Purposes)</li> <li>• M21-1 III.iii.5.C (Establishing Common Law Marriages)</li> <li>• M21-1 III.iii.5.D (Establishing Other Types of Marriages)</li> <li>• M21-1 III.iii.5.E (Establishing Marital Relationship in Survivors Cases)</li> <li>• M21-1 IV.iii.3.D (Remarriage of a Surviving Spouse)</li> <li>• M21-1 V.i.3.A (General Information on Income and Net Worth Development)</li> </ul>



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**Determine dependency eligibility for a child of a Veteran**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 13: <i>Dependency Eligibility: Child</i>
Job Aids	<b>Dependency Eligibility Requirements</b> job aid
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• 38 CFR 3.57 (Child.)</li> <li>• M21-1 III.iii.5.F (Establishing a Child's Age and Relationship)</li> <li>• M21-1 III.iii.5.G (Establishing a Biological Child, Adopted Child, or Stepchild as a Veteran's Child for Department of Veterans Affairs [VA] Purposes)</li> <li>• M21-1 III.iii.6 (School Attendance)</li> <li>• M21-1 V.iii.1.E.4.a (General Information on a Surviving Child Entitled to Survivors Pension in His/Her Own Right)</li> </ul>

**Establish parental relationship to a Veteran for the purpose of receiving DIC benefits**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 15: <i>Establish Parental Relationship for DIC</i>
Job Aids	<b>Establish Parental Relationship</b> job aid
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• 38 CFR 3.210 (Child's relationship.)</li> <li>• M21-1 III.iii.1.B.4.c (When VA may Require Evidence in Support of a Written Statement)</li> <li>• M21-1 III.iii.5.I (Establishing Parental Relationship)</li> <li>• M21-1 III.vi.6 (Contested Claims)</li> <li>• M21-1 V.iii.1.D.1.b (Determination of Parents' DIC Income Limit)</li> <li>• M21-1 V.iii.1.D.6.a (General Information on Changes in Marital and Dependency Status)</li> </ul>

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**Verify proof of death of Veteran**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 21: <i>Verify Proof of Death of Veteran for Survivors' Benefits</i>
Job Aids	None
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• 38 CFR 3.211 (Death.)</li> <li>• 38 CFR 3.202 (Evidence from foreign countries.)</li> </ul>

**Determine if an accrued claim meets time requirements**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 24: <i>Determine Accrued Benefits Eligibility</i>
Job Aids	<b>Accrued Benefits</b> job aid
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• 38 CFR 3.1000 (Entitlement under 38 U.S.C. 5121 to benefits due and unpaid upon death of a beneficiary.)</li> <li>• M21-1 III.ii.1.C.1.d (Date of Receipt for Mail Processed in the CM Portal)</li> <li>• M21-1 III.iii.5.A.1.c (Importance of Establishing the Relationship of an Individual to a Veteran)</li> <li>• M21-1V.iii.1.G.6 (Final Expense Deductions—Overview and Definitions)</li> <li>• M21-1 VIII.1.1.a (Definition: Accrued Benefits)</li> <li>• M21-1 VIII.1.2.a (Definition: Claim Pending at the Date of Death)</li> <li>• M21-1 VIII.2.1.a (Definition: Substitution in Case of Death of Claimant)</li> <li>• M21-1 VIII.2.1.c (Definition: Substitute Claimant)</li> <li>• M21-1 VIII.2.2.b (Definition: Categories of Eligible Persons)</li> <li>• M21-1 VIII.3.1.a (Applications for Accrued Benefits)</li> </ul>

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	<ul style="list-style-type: none"> <li>• M21-1 VIII.3.1.b (Applications for a Request to Substitute)</li> <li>• M21-1 VIII.3.3.a (Definition: Evidence Needed to Complete the Application for Accrued Benefits)</li> <li>• M21-1 VIII.3.4.a (When Development, Including the 5103 Notice, Is Required)</li> <li>• M21-1 VIII.3.4.b (When Development, Including the Section 5103 Notice, Is Not Required)</li> <li>• M21-1 VIII.5.12 (Allowable Items for Reimbursement)</li> </ul>

**Determine if accrued funds are payable**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 24: <i>Determine Accrued Benefits Eligibility</i>
Job Aids	<b>Accrued Benefits</b> job aid
38 CFR and M21-1 Manual	<ul style="list-style-type: none"> <li>• See references for "Determine if an accrued claim meets time requirements"</li> <li>• M21-1 VIII.4.1.g (Payment of Accrued Benefits for the Month of Death)</li> </ul>

**Determine the proper claimant**

Reference Type	Reference Name
Lesson	Phase 5, Part 1, Lesson 24: <i>Determine Accrued Benefits Eligibility</i>
Job Aids	<b>Accrued Benefits</b> job aid
38 CFR and M21-1 Manual	See references for "Determine if an accrued claim meets time requirements"