PENSION AND FIDUCIARY Service

PMC VSR Core Course

Processing a Burial Claim Checklist

Job Aid

March 2022

This job aid provides a checklist to help you as a new PMC VSR process burial claims. 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.

| ✓ | Action | Notes |
| --- | --- | --- |
| **Part 1** | Recognize indicators of burial claims(refer to **Claim Types** job aid) |  |
|  | * VA Form 21P-530 |  |
|  | * CESTed: EP 160 series |  |
| **Part 2** | Confirm claim characteristics assigned by claims assistant |  |
|  | * Verify claim is substantially complete |  |
|  | * Verify claim type |  |
|  | * Verify date of claim and effective date |  |
|  | * Verify POA |  |
|  | * Verify EP and Payee Code |  |
|  | * Verify claimant information   + Name   + Address   + SSN   + DOB |  |
| **Part 3** | Screen burial claim to deny without development |  |
|  | * Deny upfront if any ONE of these is true:   + Claimant is NOT a family member or executor or a funeral director in the case of unclaimed remains   + Claimant did NOT incur expenses   + Claimant did not submit within two-year time limit (if applicable)   + Veteran death occurred while on active duty |  |
|  | * Deny upfront if **ALL** of the following requirements are met:   + When RVSR review is NOT required for service- connected (SC) death for burial benefits (To determine, refer *Table 2: Specific Ready to Rate Requirements,* in the *When Required* column of the **Ready to Rate** job aid)   + Veteran was NOT receiving compensation or did NOT have a pending claim at the time of death that was sufficient to grant pension or disability compensation effective before the date of death   + Veteran was NOT receiving military retirement in lieu of compensation benefits at time of death   + Veteran did NOT die under VA care   + Veterans remains are NOT unclaimed |  |
|  | * Process the award if automated payment has been made:   + When RVSR review is NOT required for SC death for burial benefits (To determine, refer *Table 2: Specific Ready to Rate Requirements,* in the *When Required* column of the **Ready to Rate** job aid) **AND**   + No additional benefits are owed   *Note: Ensure the net effect on the award is $0.00.* |  |
| **Part 4** | Identify missing information/evidence |  |
|  | * Proof and/or cause of death evidence |  |
|  | * SC death evidence or correspondence |  |
|  | * Relationship eligibility of claimant to the Veteran (Priority of claimants) |  |
|  | * Eligibility information for VA contracted care at a non-VA facility |  |
|  | * Transportation receipt (missing or incomplete) |  |
| **Part 5A** | Develop for the missing information/evidence (refer to **Develop for Missing Information/Evidence** job aid) |  |
|  | * Refer to the **Time Limits** job aid |  |
|  | * Develop for the identified missing information, as needed * Call or send development letter to the claimant or funeral home (as indicated in the **Develop for Missing Information/Evidence** job aid) |  |
| **Part 5B** | Determine whether to apply due process provisions for burial claims, if required  *Refer to Burial section in* ***Due Process*** *job aid* |  |
|  | * Apply due process according to local procedures for burial claims if an automated payment was made to someone other than the Veteran’s spouse and a second claimant appears to be entitled |  |
| **Part 6** | Determine whether claim is ready to rate, if rating activity is required  *Refer to* ***Ready to Rate*** *job aid* |  |
|  | * Cause of death |  |
|  | * Medical evidence, if received |  |
|  | * Veterans claims folder, if needed |  |
|  | * Veterans service records, if needed |  |
|  | * 5103 notification sent and suspense complete, if requested |  |
| **Part**  **7** | Decide the award actions for a burial claim |  |
|  | * Refer to the following job aids:   + **Processing a Grant of Benefits** job aid   + **Processing a Denial of Benefits** job aid |  |
|  | * Is claimant entitled to:   + SC burial   + NSC burial   + VAMC hospitalization death   + Plot   + Transportation |  |
|  | * To determine the rates for the applicable benefits, refer to M21-1 XI.iii.1.B (Burial Benefits) |  |
|  | * Refer to **Annotate the Award Checklist** job aid to annotate your PMC VSR notes about deciding the award action in the applicable system |  |
| **Part 8** | Prepare a decision notice |  |
|  | * Review decision notice or create notice if applicable |  |
|  | * Determine contents, if applicable, of decision notice to include:   + Paragraphs   + Template   + Autotext |  |
| **Part 9** | Submit the claim to the Authorizer |  |
|  | * Whether granting and/or denying 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 |  |

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