



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 3: Promulgate Non-Rating or
Rating Decision

Lesson 2: Overview of the Award Process

Appendix A

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Lesson 2: Overview of the Award Process
Appendix A

Part A—Granting Benefits

Read the scenario. Use the **Processing a Grant of Benefits** job aid to help you answer the following questions.

Scenario: Angela Williams submits a completed VA Form 21-534EZ for DIC benefits on behalf of her 8 year old daughter, Olivia Roberts, on November 14, 2016.

Olivia is the surviving biological child of the Veteran, Kevin Roberts; however, Angela was not married to the Veteran and is not eligible for Survivors benefits.

After reviewing the Veteran's record, you determine a service connected death decision has been granted. The Veteran's surviving spouse, Susan Roberts, is currently in receipt of DIC benefits.

1. What decision would you use for granting this award?

2. What award type would this decision be processed under in VBMS-A?

3. You have successfully entered all the information into the VBMS-A. What is your next step in granting benefits?

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Part B—Denying Benefits

Read the scenario. Use the **Processing a Denial of Benefits** job aid to help you answer the following questions.

Scenario: VBA received a VA Form 21-527EZ, Application for Pension, a Fully Developed Claim (FDC) from Anthony Little on February 12, 2017. An EP of 187 was CESTed with a DOC 2/12/17.

Mr. Little was born on August 22, 1957. He is single and claimed one biological child, Penny Little, who does not live with him. The child was born on October 9, 1982 in Honolulu, Hawaii. Her Social Security number is TRA-45-6789. Mr. Little provided her address and who she is living with.

A review of the form shows that he served in the army from June 1, 1976 until June 1, 1980 and was honorably discharged. This was verified with a certified DD-214.

Mr. Little did not provide any medical evidence. Social Security has decided he is disabled and is paying him \$800 per month. He claimed no medical expenses. His net worth is \$0.

1. What decision would you use for denying this award?
2. What denial decision would be selected in the VBMS-A?
3. What is the final step of the denial process?

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Part C—Award Adjustment

Read the scenario. Use the **Processing an Award Adjustment** job aid to help you answer the following questions.

Scenario: A surviving spouse, Mrs. Whitney Haas, has a running Survivors Pension award. VBA is currently counting a monthly SSA income of \$485.00 and Medicare Part B of \$109.00. On October 15, 2016 VBA receives her correspondence in which she reports that her annuity became annuitized. She received her first monthly amount of \$300.00 on September 22, 2016.

1. What decision would you use for processing this award adjustment?
2. What information would be updated in the VBMS-A?
3. After you have updated the information in the VBMS-A, what is the next step in the award adjustment process?

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Appendix A

Part D—Award Renouncement

Read the scenarios. Review both scenarios and confirm the claimant has requested renouncement of the award. Use M21-1 III.ii.2.H (Renouncements) for additional assistance.

Scenario 1: August 13, 2016, the Department of Veterans Affairs receives VA Form 21-4138, *Statement in Support of Claim*, signed by the Veteran, Kermit LaRana. On the form, the Veteran states, "I wish to renounce my VA Veterans Pension benefits effective immediately." A review of the Mr. LaRana's record revealed that Mr. LaRana has been receiving VA Veterans Pension benefits without the aid and attendance allowance, since 2013. The only income on Mr. LaRana's award that is being considered is Social Security income of \$1,200.00 monthly, which matches the most current information being reported by the Social Security Administration.

Scenario 2: March 25, 2012, the Department of Veterans Affairs receives VA Form 21 -4138, *Statement in Support of Claim*, from claimant, Petunia Lee. On the form, Mrs. Lee requests to renounce her VA benefits. Upon review of Mrs. Lee's VA Form 21-4138, it is noted that this form is signed by Mrs. Lee's Service Officer from the American Legion. A review of the claimant's record revealed that the Mrs. Lee is currently in receipt of VA Dependency and Indemnity Compensation (DIC) benefits.

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Appendix A

Part E—Award Process

Read the scenario and answer the questions. Refer to the following job aids for additional assistance:

- **Processing a Grant of Benefits** job aid
- **Processing a Denial of Benefits** job aid
- **Processing an Award Adjustment** job aid

Scenario: David Curtis, a 65 year old Vietnam Veteran, submits a VA Form 21-527EZ, Application for Pension, on October 15, 2016.

Mr. Curtis is not married, but does indicate he has a dependent biological daughter, Rachel, who is 22 and has no income.

Mr. Curtis does not indicate that Rachel is in school. His only source of income is his Social Security disability of \$450.00 per month and he reports \$0.00 in net worth.

1. Based on this scenario, are there multiple issues for this claim? If so, what are the issues?
2. If Mr. Curtis was granted benefits, what would be the first step in the award process?
3. You have started the award process and you need to enter a decision for the dependent. Based on the scenario, what information should be entered in VBMS-A?
4. After you have prepared a decision notice for Mr. Curtis, what is the final step you need to take in the award process?