Pension and fiduciary service

PMC VSR Intermediate Core Course Phase 5: Proficiency Development Part 5: Award Adjustments

Determine Amended Income Adjustments

Appendix B

July 2024

Part A: Review Income

Using Example Claim 1, determine the countable income.

**Effective (Entitlement) Date:**

**Payment (Financial Decision Effective) Date:**

**Income:**

| Countable Income | Recipient | Date | Amount |
| --- | --- | --- | --- |
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Claim 2: Develop for Income Information

Use the following checklist to decide what income information is missing and development is needed.

Does each income type include the following required information?

| ü | Required Information | Details of Missing Information |
| --- | --- | --- |
|  | Gross amount of the recurring income |  |
|  | Date the first check was received |  |
|  | Date and amount of any retroactive payment received |  |
|  | Dates of any changes in the monthly rate of income |  |
|  | Frequency of the amount received |  |
|  | Source of the income |  |

Claim 3: Amended Income

**Effective (Entitlement) Date:**

**Payment (Financial Decision Effective) Date:**

**Income Information:**

| Countable Income | Recipient | Date | Amount |
| --- | --- | --- | --- |
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