



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course Phase
5: Stages of a Claim
Part 5: Award Adjustments

Lesson 6: Introduction to Overpayments and Waiver Withholdings

Appendix A

June 7, 2017

Version 1.0

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Overpayment and Waiver Withholding Scenario

Veteran Barbara Richardson—Part 1

Veteran Barbara Richardson has been receiving the max pension rate benefits since 2005. A review of a prior award print and payment history shows \$1,072/month in 2015 (based on 12-01-14 COLA). The original award was granted based on the Veteran having no form of income. The Veteran submitted a statement on February 1, 2017, stating that she started part-time employment and earns \$400/month. She reports that she received her first paycheck in September 2015.

The award adjustment processed on April 28, 2017:

- Reduced her pension benefits to \$672/month effective October 1, 2015
- Increased the benefit to \$675/month December 1, 2016 in order to account for the 2017 COLA

The adjustment for her reported employment earnings resulted in an overpayment of her pension award.

Veteran Barbara Richardson—Part 2

Veteran Barbara Richardson submitted a request for waiver of her debt on May 15, 2017.

See Appendix B for applicable waiver documents.

Veteran Barbara Richardson—Part 3

PMC VSR John reviewed an EP 127 received July 18, 2017 from Ms. Richardson, in which she requested the Aid and Attendance (A&A) allowance. She submitted the proper medical evidence for this claim and also stated she has been unable to work effective March 1, 2017. She also stated that she has no plans to get future employment although she has had no income since March 1, 2017. The claim was sent to the rating board and A&A was granted effective July 18, 2017.

See Appendix B for applicable waiver documents.

Veteran Barbara Richardson—Part 4

PMC VSR John receives Ms. Richardson's claim from the rating board. He is now ready to adjust the pension rate based on the overpayment created and the new evidence.