Pension and fiduciary service

PMC VSR Intermediate Core Course
Phase 5: Proficiency Development
Part 6: Award Adjustments\_Extension

Introduction to Apportionments

Appendix A

July 2024

Practice Exercise 1: Rules for Apportionment

**Directions**: Based on the material covered, provide a response and reference to the following:

1. (True or False). After estimating the amount of benefits VA should withhold for an apportionment, prepare a notice of proposed adverse action that informs the beneficiary of the effective date from which VA proposes to commence the apportionment.
2. (True or False?). If a completed [**VA Form 21-0788**](http://www.vba.va.gov/pubs/forms/VBA-21-0788-ARE.pdf) from the claimant is not already of record (because the claimant filed the claim prior to March 24, 2015), ask the claimant to complete and return the form within 60 days
3. Which regulation stipulates that the evidence must show that the apportionment will not cause undue hardship on the beneficiary and his/her/their other dependent(s)?
4. When determining the parent’s entitlement to an apportionment in this case, what are the provisions under which CFR applies?
5. What manual reference indicates that VA may NOT apportion a surviving spouse’s current-law Survivors Pension to a child that is not in the surviving spouse’s custody.
6. Which manual reference provides guidance on who an apportionment may be paid to or for?
7. Which regulation stipulates that Pension is not payable on behalf of a veteran for any period during which he or she is a fugitive felon.