PMC VSR Basic Core Course

**Phase 4: Knowledge Enhancer Prep Worksheet**

**Appendix A**

December 2024

**Part 1 – Checking the Box**

**Directions**: Based on the information provided, determine if the claim is considered Substantially Complete (SC), Incomplete (INC), Intent to File (ITF), or a Request for Application (RFA).

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| **Scenario** | Is the Application: (**SC, INC, ITF RFA**) |
| Mrs. Janice submitted VA Form 21P-534EZ Survivors Pension on February 19, 2020, which contained her name benefit sought, address, and dependent child. **Is the application (SC, INC, ITF, RFA)?** |  |
| On April 2, 2021, VA mailed Marshall Veteran VA Form 21P-527EZ to assist him in completing a claim for Veterans Pension. It is now August 12, 2022, and Mr. Marshall, has not submitted his complete application. **Is the application (SC, INC, ITF, RFA)?** |  |
| June Veteran submitted a claim for DIC on November 3, 2022. During your review of the application, you notice that the Veteran’s application contains, name and signature, relationship to the Veteran along with service information, and benefit sought. **Is the application (SC, INC, ITF, RFA)?** |  |
| Roger Veteran contacted the Call Center on May 8, 2023, expressing his desire to apply for Veterans Pension benefits. He sends in a form that was issued, August 2015, and you see that the form is complete. He has signed the application and included all income information. **Is the application (SC, INC, ITF, RFA)?** |  |
| In December 2020, Alex Veteran submitted a request for review based on clear and unmistakable error when he contacted the Call Center. The Veteran stated that his request for P&T was granted erroneously. **Is the application (SC, INC, ITF, RFA)?**  |  |

**Part 2 – Stages of a Claim**

**Directions**: Based on the information provided, determine the stage of the claim. Identify each stage by using one of the following: Initial Screening (IS), Claim Development (CD), Ready for Decision (RD), Award Determination/Promulgation (ADP), Claimant Notification (CN). An example has been provided for you.

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| **Scenario** | Stage of Claim (**IS, CD, RD, ADP, CN**) |
| You have reviewed Mr. Washington’s claim from start to finish to ensure all steps have been completed correct and determined that the development and rating review have been completed accurately and no additional information is needed. **Indicate the stage of the claim.** |  |
| On March 10, 2019, Rebecca, the surviving child of Tom Veteran submitted a claim for benefits. The application includes her address, the school she attends, and that she is applying for Survivors Pension. No additional information is provided. **Indicate the stage of the claim.** |  |
| You just finished processing Jerry Veteran’s claim for Veteran’s Pension. **Indicate the stage of the claim.** |  |
| Myra, the surviving parent of Virgil Veteran, applies for DIC benefits. Her application also includes: her relationship to the Veteran, if applicable, sufficient service information for VA to verify the claimed service, the benefit sought, death certificate, and birth certificate for the Veteran, and her signature. **Indicate the stage of the claim**. |  |
| Percy is a surviving spouse wanting to apply for DIC. He contacts you to apply for benefits and asks for an application. **Indicate the stage of the claim.** |  |
| Meka is a surviving spouse who wants to claim Survivors Pension. She phoned in to the VA on May 9, 2020, stating that she is placing a claim for Survivors Pension, and would submit her application soon. VA mailed an application to her on May 15, 2020, and she returned it August 12, 2020. Her application included: her relationship to the Veteran, sufficient service information for VA to verify the claimed service, the benefit sought, her signature, marital history, death certificate, and a statement of income. **Indicate the stage of the claim.** |  |
| Polly’s claim for DIC was just received with any additional evidence she mailed to the VA. **Indicate the stage of the claim.** |  |

**Part 3 – Type of Pension Claim and Claims Recognition**

**Directions**: Fill in the blank to correctly identify the Type of Pension claim or Claim Recognition.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ a one-time benefit payment payable toward the expenses of the funeral and burial of the Veteran's remains.
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is a one-time benefit in which a surviving spouse may receive the pension or compensation amount for the last month that the Veteran was entitled to before death.
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ exists when a favorable decision on one claim negatively affects the decision on a claim for another claimant; separate claims from two people that claim entitlement to the same benefit.
4. For pension claims that require a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a general medical examination is necessary for all claims when there is insufficient medical evidence available to decide the claim.
5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is a system-generated message designed to assist PMCs in identifying and tracking cases that require follow-up action.
6. An \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ may be final and irrevocable *or* the claimant may elect and reelect as often as desired depending on what the pertinent legislation authorizes.
7. Entitlement to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is defined as having been established when a permanent and total (P&T) disability, or age 65 or older.
8. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is defined as a monthly payment made to a surviving spouse, child, or parent because of an SC death that occurred on or after January 1, 1957.

**Part 4 – Save the Date**

**Directions**: Based on the information provided, determine the correct date of claim. Write the DOC below each response.

1. You receive an 800 Series Work Item (WI). The date of the write-out is August 4, 2022. What date should you use for the controlling end product?
2. On September 10, 2022, you received an e-mail from Mary Co-Worker who works for the VAMC in Raleigh, NC, showing that Thomas Veteran was officially discharged on May 12, 2022. You noticed that a development letter April 20, 2021, was sent to the Veteran asking him to provide his date of discharge due to conflicting information. Mr. Veteran originally submitted his claim for Veterans Pension on March 2, 2021, and communicated his date of discharge to Mary Co-Worker on January 9, 2022, the date he came in for his appointment. The EP was canceled due to his failure to provide the requested information; however, now, we have the information due to the email uploaded into the system by Mary Co-Worker. What is the DOC?
3. You received Jerry Veteran’s claim on May 18, 2023, from his VSO. You notice that the Veteran originally submitted the claim to his VSO on April 11, 2023, and the VSO date stamped it to show that the Veteran did indeed submit the claim to their office on April 11, 2023. What is the DOC?
4. You received Emily, a surviving spouse’s claim for on October 5, 2020, from AnyOne, a contracted scanning vendor, the date the vendor actually received and scanned the surviving spouse’s application into their system. On October 27, 2019, the surviving spouse called into the Call Center and stated that she would like to file a claim for DIC. What is the DOC?
5. Macy, the surviving child of Victor Veteran, submitted an application for DIC on July 7, 2022. She’d also submitted an application to the Boise VAMC on December 14, 2019, which was received in the PMC on January 19, 2023. What is the DOC?

**Part 5 – Match the Terms**

**Directions**: Based on the information provided, match the term on the right with the definition on the left. Record your answer (A, B C, and/or D) in the box posted by each definition.

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| **Definition** | **Term** |
| includes active duty, any period of ADT during which a person is disabled or dies from a disease or injury incurred or aggravated in the line of duty.  | 1. Qualifying Service
2. Active-Duty Training
3. Inactive Duty Training
4. Active Service
 |
| is any type of service that qualifies or potentially qualifies a claimant for Department of Veterans Affairs (VA) benefits.  |
| is based on the claimant’s status as the spouse, parent or child of a deceased Veteran.  |
| any period of IADTduring which a person is disabled or dies from an injury incurred or aggravated in the line of duty.  |

**Part 6 – Codes and EPs**

**Directions**: Based on the information provided, answer the question by providing either the EP or the Payee Code. For each scenario, assume any/all evidence, information, other factors, are met/established.

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| **Scenario** | **EP/Payee Code** |
| Henry Veteran, who is already in receipt of Veterans Pension submitted a claim for SMP. **Determine the EP/Payee Code that should be used.** | EP | Payee |
| You have received a request for an adjustment to the Veteran’s running award due to a change in dependency status as his wife passed. **Determine the EP/Payee Code that should be used.** |  |  |
| James Veteran reports a change in income, and you have determined that this only requires a correspondence reply. **Determine the EP/Payee Code that should be used.** |  |  |
| The Veteran submitted a claim for benefits but passed on August 10, 2023. Lisa, who claims to be the surviving spouse of the Veteran, submits a request for substitution, which resulted in an unfavorable substitution determination. **Determine the EP/Payee Code that should be used.** |  |  |
| You discovered that multiple accrued claims exist for Rachel Veteran who died June 5, 2020. Upon further review, you discover that the individuals who applied are Tom, her nephew, who filed July 1, 2021, John, her brother, who filed June 3, 2021, and Bailey, her sister, who filed June 8, 2021. **Determine the EP/Payee Code that should be used.** |  |  |
| On September 10, 2022, Conley of Plots Anonymous submitted a claim for reimbursement of a headstone for Mark Veteran who died November 10, 2021. **Determine the EP/Payee Code that should be used.** |  |  |
| On April 20, 2021, you received an Income Verification Worksheet for Sarah and Mike, the parents of Dudley Veteran. Separate worksheets were received for each parent. **Determine the EP/Payee Code that should be used.** |  |  |
| Alyssa, the Veteran’s surviving spouse, submitted an initial DIC claim on January 18, 2023. No prior claims for survivors’ benefits have been filed and adjudicated. **Determine the EP/Payee Code that should be used.** |  |  |