PMC VSR Intermediate Core Course

**Phase 5.1(a): Knowledge Check Prep Worksheet**

**Appendix A**

June 2024

**Part 1 - Reps & Third-Parties**

**Directions**: Read each scenario and determine if the statement is correct or incorrect. Answer each scenario with a (Y) for Yes if correct or (N) for No if incorrect.

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| **Scenario** | **Y/N** |
| For the same representative to represent a survivor, the survivor must execute a separate POA. |  |
| National Call Center and RO employees are allowed to release specified information normally protected under privacy provisions to family members or other designated persons who are not POAs, agents, or fiduciaries if there is a completed VA Form 21P-0845, *Authorization to Disclose Pension Information to a Third Party* completed and signed. |  |
| If the beneficiary and his/her spouse are both income recipients for the same tax year match, each must execute a separate POA.  |  |
| For FTI purposes, the assignment of a VSO as POA is restricted to four years from the date the *VA Form 21-22,* is signed.   |  |
| Joan Representative has chosen to withdraw as representative for Mark Veteran. Joan Representative can withdraw representation at any time if Mark Veteran has been given fair notice. |  |
| The term ***exclusive contact*** refers to sending communications with the claimant directly to a representative and generally not communicating directly with the claimant. |  |
| A represented individual who ends the relationship with his/her appointed representative at any time by expressly telling VA, is known as ***express revocation*** of the representative’s appointment. |  |
| Once VA appoints a fiduciary, the fiduciary may appoint a new POA representative, and the prior representative is notautomatically revoked. |  |
| Yolanda PMC-Worker received an incomplete form for Maggie, whose VSO is Leisure VSOs Inc. However, the VSO is not located in the same building as the RO, and there is an end product (EP) pending for Maggie’s claim. As a result, Yolanda is correct in taking actions to establish an EP 400 *Correspondence* andreturn the incomplete form to Maggie with a letter listing all necessary items for completion, and then cleared the EP 400. |  |

**Part 2 – Exclusion**

**Directions**: Read each scenario and determine if the statement is correct or incorrect. Answer each scenario with a (E) for Exclude or (DNE) for Do Not Exclude.

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| **Scenario** | **Exclude/Do Not Exclude** |
| Bob Veteran submitted VA Form 21P-527EZ, Application for Pension on April 20th, 2021, to now claim A&A. He originally filed VA Form 21P-527, on November 10th, 2020, and it is still pending.  |  |
| Amy, a surviving spouse submitted her claim for survivors’ benefits using VA Form 21P-534EZ on December 12th, 2022, without signing it. |  |
| Samuel Veteran submitted VA Form 21P-527EZ on July 19th, 2021; however, development for VA Form 21-4142, Authorization to Disclose Information to the VA to obtain Vet Center Records is needed in connection with his claim. |  |
| Rebecca, a surviving spouse applies for survivors’ benefits using VA Form 21P-534EZ on September 18th, 2023, and you determined that the claim requires a character-of-discharge (COD) determination. |  |
| For Egbert’s claim for Veteran’s Pension, which he submitted on August 1st, 2021, you discovered that VA would require independent verification of his earned income from FTI received for upfront verification. |  |
| Monica submits a dual claim for compensation and pension using VA Form 21P-527EZ, on April 4th, 2022; however, one of her claims requires additional development. |  |
| Justina submitted VA Form 21P-534EZ on October 2nd, 2022, and after reviewing the application, you determined that you would need to call her to clarify some information. You called Tuesday morning, but there was no answer; however, you left a message asking her to return your call. She returned your call Tuesday afternoon, and you were able to receive the information needed. |  |

**Part 3 – Giving a NOD**

**Directions**: Read each sentence and provide a response.

1. (Yes/No?) Is development required for the 38 USC 1318 DIC claims automated under the FNOD process.
2. Under what circumstances should you establish an EP 169?
3. (Yes/No?) Can burial benefits through the FNOD process be granted without an application upon processing a valid report of death?
4. What EP and claim label should you use after receipt of a valid NOD?
5. On August 22nd, 2023, you received a notice, from Mr. Johnson, Olan Veteran’s neighbor, that the Veteran passed on August 11, 2023. You also see that VA Form 29-4125 is of record, which was received August 13th, 2023, showing the Veteran did indeed pass on August 11, 2023. What would be the correct DOC, EP, and claim label?
6. (True or False?). VSRs should enclose VA Form 20-0998 when sending a contemporaneous notice that benefits have been discontinued based on a reported death of a beneficiary.
7. (True or False?). A death certificate for Hilda, a deceased non-Veteran beneficiary is of record, but accrued benefits exist, therefore, Millie, the PMC VSR currently working the claim must provide a notification letter, and to whom?
8. What EP should you use if you discover that an MOD payment was released erroneously to the incorrect spouse and the MOD payment should be denied?

**Part 4 – What’s Sup**

**Directions**: Read each sentence and provide a response.

1. What type of notice is issued if supplemental claim for the same issue has been received more than a year after the prior notification andItem 16 on the VA Form 20-0995, Decision Review Request: Supplemental Claim has not been checked?
2. Describe the meaning of “potentially new evidence.”
3. What type of evidence includes evidence that raises a theory of entitlement that was not previously addressed?
4. Name the three decision review lanes a claimant can use when dissatisfied with VA’s decision on their claim:
5. What are the criteria that must be met for a claim to be considered a substantially complete supplemental claim?