

**NOTE- the file numbers used are not live claims and are for training purposes only.**

## Social Security Match Debt Erroneous Payment Procedures - Examples

**Example 1:** Entitled to refund, no debt creation needed.

An EP 150 was established because of the June 24, 2022, SSA income match, showing a Veteran was in receipt of SSA income that VA was not counting. An EP 600 was established in August 2022 for due process, proposing to reduce the Veteran's award and later authorized in December 2022 to create a debt of \$22,037. On February 2023, an EP 150 is established for a medical expense adjustment based on 2022 medical expenses. The EP 150 adjustment resulted in a retroactive payment of \$4,761, reducing the Veteran's debt to \$17,276. In March 2024, DMC cancelled all remaining SSA match debt (\$17,276) and refunded the amount used to offset the debt (\$4,761).

**Result:** No duplicate payment. The Veteran is entitled to the amount of the retroactive payment (\$4,761) used to offset the debt. Therefore, the refund issued in March 2024, was correct and no action is required to recoup this amount. Follow the guidance in Step 5 of Table 1 of the Procedures where no duplicate payment exists.

Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	IWAP	MAMP	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	Sp Mthly Ent	S	# MH	# Sch
03/01/2022	-\$10.00	\$739.00	\$739.00	\$5,880.00	\$14,763.00	Vietnam Era	PT								
04/01/2022	-\$880.00	\$880.00	\$880.00	\$13,880.00	\$14,763.00	Vietnam Era	PT								
12/01/2022	-\$881.00	\$163.00	\$163.00	\$14,198.00	\$18,037.00	Vietnam Era	PT								
03/01/2023	-\$738.00	\$78.00	\$78.00	\$15,068.00	\$18,037.00	Vietnam Era	PT								
12/01/2023	-\$740.00	\$101.00	\$101.00	\$16,338.00	\$18,851.00	Vietnam Era	PT								

Beneficiary: RONALD S WALTON, Pay Status: Active, Last Paid On: 11/01/2024, Paid Through: 10/31/2024, Net Effect: (\$22,037.00)

Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	IWAP	MAMP	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	Sp Mthly Ent	S	# MH	# Sch
03/01/2023	\$433.00	\$688.00	\$688.00	\$8,907.00	\$18,037.00	Vietnam Era	PT								
03/01/2023	\$433.00	\$611.00	\$611.00	\$9,507.00	\$18,551.00	Vietnam Era	PT								
12/01/2023	\$431.00	\$632.00	\$632.00	\$10,169.00	\$18,551.00	Vietnam Era	PT								
01/01/2024	\$0.00	\$101.00	\$101.00	\$16,338.00	\$18,851.00	Vietnam Era	PT								

Beneficiary: RONALD S WALTON, Pay Status: Active, Last Paid On: 11/01/2024, Paid Through: 10/31/2024, Net Effect: \$4,761.00

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### Example 2: Duplicate payment

In December 2023, an SSA income match claim (EP 600) and a medical expense claim (EP 150) were processed *concurrently*. The total initial SSA debt amount was \$18,997 which was concurrently offset by a \$5,194 medical expense adjustment, resulting in a debt of \$13,803. In March 2024, DMC refunded the claimant \$5,194 based on the amount offset by the medical expense adjustment and cancelled the remaining SSA match debt.

**Result:** A duplicate payment exists. The \$5,194 offset amount which was applied to the debt should not have been refunded back to the Veteran because the EPs were concurrently processed. A determination of the duplicate payment amount was made by performing a paid and due audit considering the initial SSA debt amount (\$18,997) and the medical expense retroactive payment (\$5,194) which was used to reduce/offset the debt. Follow the guidance in Step 5 of Table 1 of the Procedures where a duplicate payment exists.

Current Award Proposed Award - Net Effect \$-18,997.00

Enhanced View

Effective	Net Change	Benefit	Awd Gross	Awd Net	Dis Level	IVAP	MAPR	Svc Pd	Add Gross	Tort Adj	RECA Adj	Wk Cmp Adj	Oth Adj	Ret Pay Adj	Drill Pay Adj
12/01/2008	\$0.00	Improved Pension	\$985.00	\$985.00	PT	\$0.00	\$11,830.00	Gulf War							
12/01/2011	\$0.00	Improved Pension	\$1,021.00	\$1,021.00	PT	\$0.00	\$12,256.00	Gulf War							
08/08/2012	\$0.00	Improved Pension	\$1,021.00	\$1,021.00	PT	\$0.00	\$12,256.00	Gulf War							
12/01/2012	\$0.00	Improved Pension	\$1,038.00	\$1,038.00	PT	\$0.00	\$12,465.00	Gulf War							
12/01/2013	\$0.00	Improved Pension	\$1,054.00	\$1,054.00	PT	\$0.00	\$12,652.00	Gulf War							
12/01/2014	\$0.00	Improved Pension	\$1,072.00	\$1,072.00	PT	\$0.00	\$12,868.00	Gulf War							
12/01/2016	\$0.00	Improved Pension	\$1,075.00	\$1,075.00	PT	\$0.00	\$12,907.00	Gulf War							
12/01/2017	\$0.00	Improved Pension	\$1,097.00	\$1,097.00	PT	\$0.00	\$13,166.00	Gulf War							
12/01/2018	\$0.00	Improved Pension	\$1,127.00	\$1,127.00	PT	\$0.00	\$13,535.00	Gulf War							
12/01/2019	\$0.00	Improved Pension	\$1,145.00	\$1,145.00	PT	\$0.00	\$13,752.00	Gulf War							
12/01/2020	\$0.00	Improved Pension	\$1,160.00	\$1,160.00	PT	\$0.00	\$13,931.00	Gulf War							
12/01/2021	\$0.00	Improved Pension	\$1,229.00	\$1,229.00	PT	\$0.00	\$14,753.00	Gulf War							
12/01/2022	\$0.00	Improved Pension	\$1,338.00	\$1,338.00	PT	\$0.00	\$16,037.00	Gulf War							
01/01/2023	-\$850.00	Improved Pension	\$488.00	\$488.00	PT	\$10,200.00	\$16,037.00	Gulf War							
12/01/2023	-\$877.00	Improved Pension	\$502.00	\$502.00	PT	\$10,524.00	\$16,551.00	Gulf War							

Display from Earliest Changed Line on this Award Display All Award Lines

Selected Award Line Details

Inst Adj	Sep Pay Adj	Dis Sev Pay Adj	Tot WH	Sp Mthly Ent	S	# MH	# Sch	# Par	Tort Bal	RECA Bal	Dis Sev Pay Bal	Sep Pay Bal	CRDP Amt	CRSC Amt	
Award Reasons		Beneficiary		Beneficiary Type		Amount									
Cost of Living Adjustment		SUSIE SOSBY		Primary Beneficiary		\$985.00									
Net Worth Adjustment															
Beneficiary		Fiduciary		Pay Status		Last Paid On		Paid Through		Pending Suspend/Resume Action		Net Effect		Retro Pay Date	
Suse SOSBY				Active		11/01/2024		10/31/2024				(\$18,997.00)			

Return Award Authorize Concur Gen eDoc Decision History Award History GAO Gen Letter Gen HLR Decision Return to Search Return to Record Decisions

Current Award Proposed Award - Net Effect \$-13,803.00

Enhanced View

Effective	Net Change	Benefit	Awd Gross	Awd Net	Dis Level	IVAP	MAPR	Svc Pd	Add Gross	Tort Adj	RECA Adj	Wk Cmp Adj	Oth Adj	Ret Pay Adj	Drill Pay Adj
12/01/2008	\$0.00	Improved Pension	\$985.00	\$985.00	PT	\$0.00	\$11,830.00	Gulf War							
12/01/2011	\$0.00	Improved Pension	\$1,021.00	\$1,021.00	PT	\$0.00	\$12,256.00	Gulf War							
08/08/2012	\$0.00	Improved Pension	\$1,021.00	\$1,021.00	PT	\$0.00	\$12,256.00	Gulf War							
12/01/2012	\$0.00	Improved Pension	\$1,038.00	\$1,038.00	PT	\$0.00	\$12,465.00	Gulf War							
12/01/2013	\$0.00	Improved Pension	\$1,054.00	\$1,054.00	PT	\$0.00	\$12,652.00	Gulf War							
12/01/2014	\$0.00	Improved Pension	\$1,072.00	\$1,072.00	PT	\$0.00	\$12,868.00	Gulf War							
12/01/2016	\$0.00	Improved Pension	\$1,075.00	\$1,075.00	PT	\$0.00	\$12,907.00	Gulf War							
12/01/2017	\$0.00	Improved Pension	\$1,097.00	\$1,097.00	PT	\$0.00	\$13,166.00	Gulf War							
12/01/2018	\$0.00	Improved Pension	\$1,127.00	\$1,127.00	PT	\$0.00	\$13,535.00	Gulf War							
12/01/2019	\$0.00	Improved Pension	\$1,145.00	\$1,145.00	PT	\$0.00	\$13,752.00	Gulf War							
12/01/2020	\$0.00	Improved Pension	\$1,160.00	\$1,160.00	PT	\$0.00	\$13,931.00	Gulf War							
12/01/2021	\$0.00	Improved Pension	\$1,229.00	\$1,229.00	PT	\$0.00	\$14,753.00	Gulf War							
12/01/2022	\$0.00	Improved Pension	\$1,338.00	\$1,338.00	PT	\$0.00	\$16,037.00	Gulf War							
01/01/2023	-\$417.00	Improved Pension	\$919.00	\$919.00	PT	\$5,001.00	\$16,037.00	Gulf War							
12/01/2023	-\$446.00	Improved Pension	\$933.00	\$933.00	PT	\$5,351.00	\$16,551.00	Gulf War							
01/01/2024	-\$877.00	Improved Pension	\$502.00	\$502.00	PT	\$10,524.00	\$16,551.00	Gulf War							

Display from Earliest Changed Line on this Award Display All Award Lines

Selected Award Line Details

Inst Adj	Sep Pay Adj	Dis Sev Pay Adj	Tot WH	Sp Mthly Ent	S	# MH	# Sch	# Par	Tort Bal	RECA Bal	Dis Sev Pay Bal	Sep Pay Bal	CRDP Amt	CRSC Amt	
Award Reasons		Beneficiary		Beneficiary Type		Amount									
Cost of Living Adjustment		SUSIE SOSBY		Primary Beneficiary		\$985.00									
Net Worth Adjustment															
Beneficiary		Fiduciary		Pay Status		Last Paid On		Paid Through		Pending Suspend/Resume Action		Net Effect		Retro Pay Date	
Suse SOSBY				Active		11/01/2024		10/31/2024				(\$13,803.00)			

Return Award Authorize Concur Gen eDoc Decision History Award History GAO Gen Letter Gen HLR Decision Return to Search Return to Record Decisions

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### Example 3: Erroneous payment

An EP 150 was established because of the June 24, 2022, SSA income match, showing a Veteran was in receipt of SSA income that VA was not counting. An EP 600 was established in September 2022 for due process, proposing to reduce the Veteran's award. In December 2022, the EP 600 was authorized and created a debt of \$41,000. On April 2023, an EP 150 was established for a medical expense adjustment based on 2022 medical expenses, and the Veteran also reported a child that was born on December 1, 2021 (previously unreported). On May 15, 2023, VA authorized the medical expense claim and added the child effective January 1, 2022. The action resulted in a retroactive increase of \$23,946 (\$18,946 based on increased medical expenses and \$5,000 based on the dependency adjustment) which was applied to the debt. The debt is now \$17,054. On August 15, 2023, the Veteran paid \$17,054 directly to DMC to resolve the debt. In March 2024, DMC refunded \$41,000, resulting in \$0.00 debt balance. On September 17, 2024, VA identified that the action to add the Veteran's child effective January 1, 2022, was incorrect because the claim was not received within one year of the birth. The child should have been added May1, 2023.

**Result:** This is not a duplicate payment. The Veteran is entitled to the retroactive increase and the amount paid to DMC to resolve the debt; however, they were overpaid \$5,000 erroneously due to the dependency adjustment effective date administrative error. DMC's refund was \$5,000 too much due to the administrative error. Follow the guidance in Table 2 of the Procedures for erroneous payment corrective action.

#### 1. SSA Income Adj

Current and Proposed Award/Authorization

Current Award Proposed Award - Net Effect \$-41,000.00

Enhanced View Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	Sp Mthly Ent	IWAP	MAPR	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	S	# MH	# Sch
09/01/2021	-\$1,000.00	\$177.00	\$177.00	AA	\$21,108.00	\$23,238.00	Vietnam Era	PT							
12/01/2021	-\$1,000.00	\$247.00	\$247.00	AA	\$21,844.00	\$24,910.00	Vietnam Era	PT							
12/01/2022	-\$1,000.00	\$355.00	\$355.00	AA	\$22,483.00	\$26,752.00	Vietnam Era	PT							
12/01/2023	-\$1,000.00	\$399.00	\$399.00	AA	\$22,818.00	\$27,809.00	Vietnam Era	PT							

Display from Earliest Changed Line on this Award Display All Award Lines

Award Reasons	Beneficiary	Beneficiary Type	Amount
Original Award	ANNITA ANNETTE CHILDRESS	Primary Beneficiary	\$177.00

Beneficiary	Fiduciary	Pay Status	Last Paid On	Paid Through	Pending Suspend/Resume Action	Net Effect	Retro Pay Date
ANNITA ANNETTE CHILDRESS		Active	11/01/2024	10/31/2024		(\$41,000.00)	

Return Award Authorize Concur Gen eDoc Decision History Award History GAO Gen Letter Gen HLR Decision Return to Search Return to Record Decisions

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## 2. Adding Minor Child Dependent Only

Veteran: ANNITA ANNETTE CHILDRESS SSN: 452-98-3758 File Number: 45203758 Compensation/Pension Live

Record Decisions - Dependency

Modify Display:

Person	Relation Subtype	Event Date	Award Status	Decision	Award Eff. Dt.	Relation	SSN	Date of Bir
MARY CHILDRENN	Biological Child	12/01/2021	Minor Child	Eligible Minor Child	01/01/2022	Child	No SSN Assigned b	12/01/2021
MARY CHILDRENN	Biological Child	12/01/2039	Removal of Dependent	Turns 18	12/01/2039	Child	No SSN Assigned b	12/01/2021

Buttons: Add, Delete, Undo, History, Done, Return To Main

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Current Award: Proposed Award - Net Effect \$13,834.00

Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	Sp Mthly Ent	IVAP	MAPR	# MH	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	S	# Sch
01/01/2022	\$380.00	\$627.00	\$627.00	AA	\$21,844.00	\$29,175.00	1	Vietnam Era	PT						
12/01/2022	\$414.00	\$769.00	\$769.00	AA	\$22,483.00	\$31,714.00	1	Vietnam Era	PT						
12/01/2023	\$426.00	\$826.00	\$826.00	AA	\$22,818.00	\$32,729.00	1	Vietnam Era	PT						
12/01/2039	\$0.00	\$399.00	\$399.00	AA	\$22,818.00	\$27,009.00	0	Vietnam Era	PT						

Display from Earliest Changed Line on this Award  Display All Award Lines

Award Reasons	Beneficiary	Beneficiary Type	Amount
Minor Child Adjustment	ANNITA ANNETTE CHILDRESS	Primary Beneficiary	\$627.00

Beneficiary	Fiduciary	Pay Status	Last Paid On	Paid Through	Pending Suspend/Resume Action	Net Effect	Retro Pay Date
ANNITA ANNETTE CHILDRESS		Active	11/01/2024	10/31/2024		\$13,834.00	01/01/2022

Buttons: Return Award, Authorize, Concur, Gen eDoc, Decision History, Award History, GAO, Gen Letter, Gen HLR Decision, Return to Search, Return to Record Decisions

## 3. Concurrent Adjustment to Add Child & Medical Expense Adjustment

Current Award: Proposed Award - Net Effect \$23,946.00

Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	Sp Mthly Ent	IVAP	MAPR	# MH	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	S	# Sch
01/01/2022	\$380.00	\$627.00	\$627.00	AA	\$21,844.00	\$29,175.00	1	Vietnam Era	PT						
02/01/2022	\$1,300.00	\$1,547.00	\$1,547.00	AA	\$10,910.00	\$29,175.00	1	Vietnam Era	PT						
12/01/2022	\$1,328.00	\$1,681.00	\$1,681.00	AA	\$11,533.00	\$31,714.00	1	Vietnam Era	PT						
01/01/2023	\$414.00	\$769.00	\$769.00	AA	\$22,483.00	\$31,714.00	1	Vietnam Era	PT						
12/01/2023	\$426.00	\$826.00	\$826.00	AA	\$22,818.00	\$32,729.00	1	Vietnam Era	PT						
12/01/2039	\$0.00	\$399.00	\$399.00	AA	\$22,818.00	\$27,009.00	0	Vietnam Era	PT						

Display from Earliest Changed Line on this Award  Display All Award Lines

Award Reasons	Beneficiary	Beneficiary Type	Amount
Minor Child Adjustment	ANNITA ANNETTE CHILDRESS	Primary Beneficiary	\$627.00

Beneficiary	Fiduciary	Pay Status	Last Paid On	Paid Through	Pending Suspend/Resume Action	Net Effect	Retro Pay Date
ANNITA ANNETTE CHILDRESS		Active	11/01/2024	10/31/2024		\$23,946.00	01/01/2022

Buttons: Return Award, Authorize, Concur, Gen eDoc, Decision History, Award History, GAO, Gen Letter, Gen HLR Decision, Return to Search, Return to Record Decisions

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**Example 4:** EP 930 completed to reverse debt

An EP 150 was established because of the June 24, 2022, SSA income match, showing a Veteran was in receipt of SSA income that VA was not counting. VA issued a notification letter, proposing to terminate the Veteran’s pension award effective June 1, 2009. An award was authorized in January 2023, which terminated benefits effective June 1, 2009, establishing the SSA match debt of \$-96,534. The PMC established an EP 930 in February 2024 to reverse the decision and offset the debt. In March 2024, DMC refunded the amount used to offset the debt (\$96,534).

**Result:** Duplicate Refund. Because the EP 930 was properly applied to reverse the SSA match debt balance, the Veteran is not entitled to the refund issued in March 2024 and must be recouped. Follow the guidance in Step 5 of Table 1 of the Procedures where a duplicate payment exists.

Current Award: Proposed Award - Net Effect \$-96,534.00

Enhanced View: Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	Svc Pd	Add Gross	Oth Adj	Inst Adj	Tot WH	Sp Mthly Ent	IWAP	MAPR	S	MM	Sch	Dis Lvl
06/01/2009	\$0.00	\$0.00	\$0.00	Vietnam Era											

Display from Earliest Changed Line on this Award  Display All Award Lines

Award Reasons: Benefit Eligibility Adjustment

Beneficiary: RONALD JOSEPH MARRONE

Beneficiary Type: Primary Beneficiary

Amount: \$0.00

Beneficiary: RONALD JOSEPH MARRONE

Fiduciary: Terminated

Pay Status: Terminated

Last Paid On: 11/01/2024

Paid Through: 10/31/2024

Pending Suspend/Resume Action

Net Effect: (\$96,534.00)

Retro Pay Date

Buttons: Return Award, Authorize, Concur, Gen eDoc, Decision History, Award History, GAO, Gen Letter, Gen HLR Decision, Return to Search, Return to Record Decisions

**Historical Award**

Eff Date	Reason	MAPR	Gross	Net	Net Change	TotalW/H	AllotW/H	Dis Lvl	S	M	H	S	P
										C	C	C	
06/01/2009	Benefit Eligibility Adjustment		461.00	461.00	-461.00			0.00	PT				
12/01/2011	Cost of Living Adjustment, Countable Income Adjustment	12256.0	479.00	479.00	-479.00			0.00	PT				
08/06/2012	Cost of Living Adjustment	12256.0	479.00	479.00	-479.00			0.00	PT				
12/01/2012	Cost of Living Adjustment, Countable Income Adjustment	12465.0	486.00	486.00	-486.00			0.00	PT				
12/01/2013	Cost of Living Adjustment, Countable Income Adjustment	12652.0	494.00	494.00	-494.00			0.00	PT				
12/01/2014	Cost of Living Adjustment, Countable Income Adjustment	12868.0	503.00	503.00	-503.00			0.00	PT				
12/01/2016	Cost of Living Adjustment, Countable Income Adjustment	12907.0	504.00	504.00	-504.00			0.00	PT				
12/01/2017	Cost of Living Adjustment, Countable Income Adjustment	13166.0	515.00	515.00	-515.00			0.00	PT				
12/01/2018	Cost of Living Adjustment, Countable Income Adjustment	13535.0	528.00	528.00	-528.00			0.00	PT				
12/01/2019	Cost of Living Adjustment, Countable Income Adjustment	13752.0	538.00	538.00	-538.00			0.00	PT				
12/01/2020	Cost of Living Adjustment, Countable Income Adjustment	13931.0	544.00	544.00	-544.00			0.00	PT				
12/01/2021	Cost of Living Adjustment, Countable Income Adjustment	14753.0	577.00	577.00	-577.00			0.00	PT				
12/01/2022	Cost of Living Adjustment	16037.0	627.00	627.00	-627.00			0.00	PT				
12/01/2023	Cost of Living Adjustment	16551.0	648.00	648.00	-648.00			0.00	PT				

**NOTE- the file numbers used are not live claims and are for training purposes only.**

Current Award
Proposed Award - Net Effect \$96,534.00

Enhanced View

**Benefit:** Improved Pension

Effective	Net Change	Award Gross	Award Net	TWRP	MAPR	Svc Pld	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	Sp Mthly Ent	S	# MH	# Sch
06/01/2009	\$491.00	\$491.00	\$491.00	\$6,288.00	\$11,830.00	Vietnam Era	PT								
12/01/2011	\$470.00	\$470.00	\$470.00	\$6,504.00	\$12,256.00	Vietnam Era	PT								
08/09/2012	\$470.00	\$470.00	\$470.00	\$6,504.00	\$12,256.00	Vietnam Era	PT								
12/01/2012	\$480.00	\$480.00	\$480.00	\$6,624.00	\$12,495.00	Vietnam Era	PT								
12/01/2013	\$494.00	\$494.00	\$494.00	\$6,720.00	\$12,802.00	Vietnam Era	PT								
12/01/2014	\$503.00	\$503.00	\$503.00	\$6,828.00	\$12,898.00	Vietnam Era	PT								
12/01/2016	\$504.00	\$504.00	\$504.00	\$6,852.00	\$12,907.00	Vietnam Era	PT								
12/01/2017	\$515.00	\$515.00	\$515.00	\$6,968.00	\$13,198.00	Vietnam Era	PT								
12/01/2018	\$528.00	\$528.00	\$528.00	\$7,188.00	\$13,535.00	Vietnam Era	PT								
12/01/2019	\$538.00	\$538.00	\$538.00	\$7,296.00	\$13,792.00	Vietnam Era	PT								
12/01/2020	\$544.00	\$544.00	\$544.00	\$7,362.00	\$13,931.00	Vietnam Era	PT								
12/01/2021	\$577.00	\$577.00	\$577.00	\$7,824.00	\$14,793.00	Vietnam Era	PT								
12/01/2022	\$627.00	\$627.00	\$627.00	\$8,504.00	\$16,037.00	Vietnam Era	PT								
12/01/2023	\$646.00	\$646.00	\$646.00	\$8,775.00	\$16,551.00	Vietnam Era	PT								

Display from Earliest Changed Line on this Award
  Display All Award Lines

<b>Award Reasons</b>	<b>Beneficiary</b>	<b>Beneficiary Type</b>	<b>Amount</b>
Original Award	RONALD JOSEPH MARRONE	Primary Beneficiary	\$491.00

<b>Beneficiary</b>	<b>Fiduciary</b>	<b>Pay Status</b>	<b>Last Paid On</b>	<b>Paid Through</b>	<b>Pending Suspend/Resume Action</b>	<b>Net Effect</b>	<b>Retro Pay Date</b>
RONALD JOSEPH MARRONE		Active	11/01/2024	10/31/2024		\$96,534.00	06/01/2009

Return Award
Authorize
Concur
Gen eDoc
Decision History
Award History
GAO
Gen Letter
Gen HLR Decision
Return to Search
Return to Record Decisions



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**Example 5: Subsequent Claims Received After SSA Debt Was Canceled/Refunded in March 2024**

A Veteran was in receipt of VA benefits of the following amounts.

- \$171 effective April 1, 2020
- \$178 effective December 1, 2020
- \$205 effective December 1, 2021
- \$249 effective December 1, 2022
- \$266 effective December 1, 2023

An EP 150 was established because of the June 24, 2022, SSA income match, showing a Veteran was in receipt of additional SSA income for 2022 and 2023. An EP 600 was established for due process and was completed in November 2023 to reduce the Veteran's VA benefits to the following amounts.

- \$195 Effective March 1, 2022
- \$239 effective December 1, 2022
- \$256 effective December 1, 2023 – November 1, 2024

As a result, a debt was created from March 1, 2022 – November 1, 2024, in the amount of \$320. DMC cancelled the amount of debt due to the SSA income match totaling \$320. An EP 150 was received for 2023 medical expenses in November 2024, which overlaps the debt cancellation period in 2023. This award was authorized and increased the Veteran's benefit rates to \$635 per month, effective February 1, 2023, and \$652 per month effective December 1, 2023, resulting in a retroactive payment of \$8,316.

**Result:** A portion of this retroactive payment will need to be withheld based on the debt cancellation for the overlapping period in 2023 and 2024. Follow the guidance in Step 4 of Table 3 of the Procedures where a subsequent claim adjustment results in a retroactive increase for an overlapping period where a debt was previously cancelled.

**1. Award Adjustment to Correct SSA**

Current and Proposed Award/Authorization

Current Award Proposed Award - Net Effect \$-320.00

Enhanced View Benefit: Improved Fanson

Effective	Net Change	Awd Gross	Awd Net	Sp Mthly Ent	IWAP	MAPR	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	S	MH	Sch
03/01/2022	-\$10.00	\$195.00	\$195.00	AA	\$22,256.80	\$24,610.00	Korean Conflict	PT							
12/01/2022	-\$10.00	\$239.00	\$239.00	AA	\$23,877.80	\$26,762.00	Korean Conflict	PT							
12/01/2023	-\$10.00	\$256.00	\$256.00	AA	\$24,525.80	\$27,809.00	Korean Conflict	PT							

Display from Earliest Changed Line on this Award Display All Award Lines

Award Reasons: Countable Income Adjustment

Beneficiary: ARTHUR MORRIS DESAUTELS

Beneficiary Type: Primary Beneficiary

Amount: \$195.00

Beneficiary: ARTHUR MORRIS Desautels

Fiduciary: DONNA RATTLEL

Pay Status: Active

Last Paid On: 11/01/2024

Paid Through: 10/31/2024

Pending Suspend/Resume Action

Net Effect: (\$320.00)

Retro Pay Date:

Return Award Authorize Concur Gen eDoc Decision History Award History GAO Gen Letter Gen HLR Decision Return to Search Return to Record Decisions

**NOTE- the file numbers used are not live claims and are for training purposes only.**

## 2. Award to Increase based on Meds without withholding screen entry

Current Award Proposed Award - Net Effect \$8,316.00

Enhanced View Benefit: Improved Pension

Effective	Net Change	Awd Gross	Awd Net	Sp Mthly Ent	IVAP	MAPR	Svc Pd	Dis Level	Add Gross	Oth Adj	Inst Adj	Tot WH	S	# MH	# Sch
02/01/2023	\$396.00	\$652.00	\$635.00	AA	\$19,128.00	\$26,752.00	Korean Conflict	PT							
12/01/2023	\$396.00	\$652.00	\$652.00	AA	\$19,776.00	\$27,609.00	Korean Conflict	PT							

Display from Earliest Changed Line on this Award Display All Award Lines

Award Reasons: Beneficiary ARTHUR MORRIS DESAUTELS, Beneficiary Type Primary Beneficiary, Amount \$635.00

Beneficiary ARTHUR MORRIS Desautels, Fiduciary DONNA RATTLELL, Pay Status Active, Last Paid On 11/01/2024, Paid Through 10/31/2024, Pending Suspend/Resume Action, Net Effect \$8,316.00, Retro Pay Date 02/01/2023

Return Award, Authorize, Concur, Gen eDoc, Decision History, Award History, GAO, Gen Letter, Gen HLR Decision, Return to Search, Return to Record Decisions

## 3. Withholding Screen Entry showing the \$10.00 per month that was part of the Cleared Debt **NOTE the file numbers used are not live claims and are for training purposes only”.**

Record Decisions - Other Adjustments

Main, Allocations, Award Adjustments, Basic Eligibility, Dependency, Elections, Financial, Institutionalizations, Military Eligibility, Military Payment Info, Rating, Fraud

Disability Pay, Separation Pay, Retired Pay, Drill Pay, Other Adjustments, Lump Sum Retired Pay, Agent/Attorney Fee

Select	Decision Date	Adjustment Reason	Disability Pay Type	Adjustment Amt	Add to Withholding	Total Overpayment Amt	Total Non-Recoupable Amt	From Date	To Date
<input type="checkbox"/>	11/07/2024	Other Withholding Reason		\$10.00				02/01/2023	11/01/2024

Add, Delete, Undo, History, Done, Return to Main

## 4. Award Action with Withholding to avoid duplicate payments during Debt Period

Current Award Proposed Award - Net Effect \$8,106.00

Enhanced View Benefit: Improved Pension

Effective	Net Change	Awd Gross	Oth Adj	Tot WH	Awd Net	Sp Mthly Ent	IVAP	MAPR	Svc Pd	Dis Level	Add Gross	Inst Adj	S	# MH	# Sch
02/01/2023	\$396.00	\$635.00	\$10.00	\$10.00	\$625.00	AA	\$19,128.00	\$26,752.00	Korean Conflict	PT					
12/01/2023	\$396.00	\$652.00	\$10.00	\$10.00	\$642.00	AA	\$19,776.00	\$27,609.00	Korean Conflict	PT					
11/01/2024	\$396.00	\$652.00	\$0.00	\$0.00	\$652.00	AA	\$19,776.00	\$27,609.00	Korean Conflict	PT					

Display from Earliest Changed Line on this Award Display All Award Lines

Award Reasons: Beneficiary ARTHUR MORRIS DESAUTELS, Beneficiary Type Primary Beneficiary, Amount \$625.00

Beneficiary ARTHUR MORRIS Desautels, Fiduciary DONNA RATTLELL, Pay Status Active, Last Paid On 11/01/2024, Paid Through 10/31/2024, Pending Suspend/Resume Action, Net Effect \$8,106.00, Retro Pay Date 02/01/2023

Return Award, Authorize, Concur, Gen eDoc, Decision History, Award History, GAO, Gen Letter, Gen HLR Decision, Return to Search, Return to Record Decisions