Pension and Fiduciary Service

PMC VSR Advanced Core Course

Phase 6: Practical Application and Experience

Processing Month of Death (MOD) Claims

Trainee Guide

June 2024

Process Month of Death (MOD) Claims

Lesson Overview

| Topic | Description |
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| Time Estimate: | 4 hours |
| Purpose of the Lesson: | This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to train you to process MOD claims through demonstration, practice, and feedback. Lesson includes how to use the systems for processing the claims. |
| Prerequisite Training Requirements: | Prior to taking the Process Month of Death (MOD) Claims lesson, you must complete PMC VSR Core Course Phases 1–5.6. |
| Target Audience: | This lesson is for entry-level PMC VSRs. |
| Lesson References: | *Public Law 112-154 (*Honoring America's Veterans and Caring for Camp Lejeune Families Act of 2012)  * 38 USC 5101 (Claims and Forms) * 38 USC 5310 (Payment of benefits for Month of Death) * 38 CFR 3.20 (Surviving spouse's benefit for month of veteran's death) * M21-1 XI.ii.2 (Month of Death (MOD) Benefit) * M21-1 XI.i.1.B.3 (Processing MOD Payments with Other Death Benefits) * M21-4 Appendix A (Payee Codes) * **Process a Month of Death (MOD) Claim Checklist** job aid |
| Lesson Objectives: | By the end of this lesson, you should be able to:   * Process a claim for Month of Death (MOD) benefit * Recognize indicators of an MOD claim * Confirm claim characteristics assigned by claims assistant * Identify missing information/evidence * Apply the correct development actions for the information/evidence missing from the claim * Determine entitlement to MOD claim * Determine if claim should be submitted to rating activity * Decide the award action for MOD claim * Prepare a decision notice for MOD benefit * Submit the claim to the Authorizer |
| What You Need: | * Trainee guide * Access to VBA intranet * Pen and paper * Access to the following systems:   + SHARE   + VBMS * Access to CPKM * Access to the Assessment Portal * **Process a Month of Death (MOD) Claim Checklist** job aid |

| PowerPoint Slides | Notes |
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| Process Month of Death (MOD) Claims |  |
| Lesson Objectives (1 of 2)   * Process a claim for Month of Death (MOD) benefit * Recognize indicators of an MOD claim * Confirm claim characteristics assigned by claims assistant * Screen claim for lack of eligibility (to determine if claim may be denied without development) * Identify missing information/evidence * Develop for missing information/evidence |  |
| Lesson Objectives (2 of 2)   * Determine entitlement to MOD claim * Determine if claim should be submitted to rating activity * Decide the award action for MOD claim * Prepare a decision notice for MOD benefit * Submit the claim to the Authorizer |  |
| Overview of Processing an MOD Claim   * Many of the steps required to process a claim are done simultaneously by PMC VSRs in the field. * For the purpose of instruction, the steps are broken out individually. |  |
| Scenario—Month of Death (MOD) Claim (1 of 2)  Kitty, a surviving spouse, applied for her late Veteran husband's Month of Death (MOD) payment. On August 13, 2015, VA received her Statement in Support of Claim, VA Form 21-4138 requesting the Veteran's payment amount for the month of his death. Kitty has not submitted a claim for DIC, Survivor's Pension, or accrued benefits. The Veteran passed away on July 11, 2015 and was in receipt of service-connected compensation benefits receiving a monthly amount of $917.13 as a Veteran with one dependent (spouse). |  |

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| Scenario—Month of Death (MOD) Claim (2 of 2)  The PMC VSR reviews the Veteran’s payment history and award and determines that an automatic MOD payment was not released. The PMC VSR reviews the claim and determines that Kitty was already on the Veteran's award. Her Social Security number and date of birth are already of record. She included her full name and address with her claim. The PMC VSR should grant Kitty a one-time payment of $917.13 effective July 1, 2015 under an EP 290 (PMC - MOD Check Request). |  |
| Lesson Overview   * **Demonstration**—Instructor processes a claim from start to finish with opportunities for questions. * **Additional demonstrations can be completed post lesson if necessary**. |  |
| * **Demonstration  Recognize Indicators of an MOD Claim** * Log into VBMS Core * Review “My Work Queue” * EP 290 PMC MOD Check Request is assigned to your daily workload * Click on EP Code/Claim Label |  |
| Demonstration—Confirm Claim Characteristics Assigned by Claims Assistant |  |
| Claim 1—Identify Missing Information/Evidence   * Review claim materials in VBMS * Review SHARE   + BIRLS -> Service Verification and Date of Death   + Corporate -> Awards/Ratings -> CPL Tab and CPD Tab * Confirm dependency information   + Corporate -> All Relationships   + VBMS -> Veteran -> Dependents * Confirm address on claim and VA Records |  |
| Demonstration Make Determination on Next Step of Processing   * Development * Send to Rating * Award |  |
| Claim 1—Determine Entitlement to MOD Benefit   * Has spouse already received MOD payment through automation? * Was Veteran being paid Compensation or Pension benefit at time of death? * Does surviving spouse meet eligibility requirements? |  |
| Demonstration Prepare a Decision Notification for MOD Benefit  Key Points:   * Name and Address * Rate and Payment Date * Evidence Used * Additional Benefit Entitlement * Return Payment Information​ * Appeal Rights * POA​ * Enclosures​ |  |
| Demonstration Submit the Award to the Authorizer   * Route claim to authorizer using the National Work Queue * Ensure letter is saved appropriately for review by authorizer based on local procedures |  |
| Knowledge Check: Lesson Summary Review    **Time Allowed**: 15 minutes |  |
| What’s Next?   * Complete Process MOD Claims course evaluation: TMS ID 4408388 |  |