Pension and Fiduciary Service

PMC VSR Advanced Core Course Phase 6: Practical Application and Experience

Process a Request for Renouncement of Benefits

Trainee Guide

July 2024

Process a Request for Renouncement of Benefits

Lesson Overview

| Topic | Description |
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| Time Estimate: | 2 hours |
| Purpose of the Lesson: | This lesson is part of the entry-level course for PMC VSRs. The purpose of this lesson is to train PMC VSRs to process a request for renouncement of benefits through demonstration, practice, and feedback. |
| Prerequisite Training Requirements: | Prior to taking the Process a Request for Renouncement of Benefits lesson, you must complete the entry-level course Phases 1–5.6. |
| Target Audience: | This lesson is for entry-level PMC VSRs. |
| Lesson References: | * M21-1 VI.i.1.A (Decision Authorization) * M21-1 X.iv.4. (Renouncements) * M21-1 X.iv.4.1.b (Acceptable Means of Renouncing the Right to a Benefit) * M21-1 X.iv.4.3.d. (Notification of Renouncement of the Right to Pension or Parents DIC) * M21-1 X.iv.4.3.e. (Notification of Renouncement of the Right to Benefits Other Than Pension or Parents DIC |
| Technical Competencies: | * Processing Claims (PMC VSR) * Income Counting and Net Worth * Special Monthly Pension (SMP) Processing * VBA Applications (PMC VSR) * Program Benefits and Eligibility (PMC VSR) |
| Knowledge Check | Phase 6 Process a Request for Renouncement of Benefits Knowledge Check |
| Lesson Objectives: | * Process a request for renouncement of benefits. * Determine if renouncement evidence is clear and unambiguous. * Determine if there is evidence of another issue. * Process the renouncement in VBMS. * Prepare decision notice notifying claimant of the renouncement. |
| What You Need: | * Trainee guide * **Access to the Process a Renouncement of Benefits Checklist** job aid from VSR Assistant |

| PowerPoint Slides | Notes |
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| Process a Request for Renouncement of Benefits |  |
| Lesson Objectives   * Process a request for renouncement of benefits. * Determine if renouncement evidence is clear and unambiguous. * Determine if there is evidence of another issue. * Process the renouncement in VBMS. * Prepare decision notice notifying claimant of the renouncement. |  |
| Why It Matters!  It is important that you understand how to correctly process a renouncement as it involves terminating a benefit at the request of the beneficiary. Terminating a benefit without the proper request for renouncement from the beneficiary can cause financial hardship for the beneficiary. |  |
| Reasons for Renouncement of Benefits   * Beneficiaries desiring to renounce their right to a benefit usually fall into one of the following categories:   + Beneficiaries who want to qualify for a low income program such as Medicaid or government housing   + Beneficiaries who became entitled to income (SSA), failed to report it in a timely manner, and request renouncement to avoid overpayment   + DIC beneficiaries who have remarried and failed to report it in a timely manner   + DIC children who qualify for DEA, failed to report it in a timely manner, and request renouncement to avoid overpayment |  |
| Processing a Renouncement of Benefits   * **Processing an Award Renouncement** job aid   + Enter information in VBMS-A   + Generate award   + Prepare decision notice   + Submit to Authorizer |  |
| ****Demonstration—****Determine if Renouncement Evidence is Clear and Unambiguous  Indicates a demonstration should be performed   * Confirm that a written and signed request from the beneficiary was sent to the VA requesting renouncement of benefits.   Confirm that the request for renouncement is clear and unambiguous. |  |
| ****Demonstration—****Determine if There is Evidence of Another Issue  Indicates a demonstration should be performed   * Depending on the reason for renouncement, development may be required   + Change in income/net worth or dependency   + If claim indicates other means of support, such as marriage or social security, but does not state what it is * **If development is required due to indication of other issues such as dependency or net worth, you would process an award adjustment:**   + **EP 130 for dependency**   + **EP 150 for income/net worth** |  |
| Demonstration--Enter Information in VBMS-A  Indicates a demonstration should be performed   * Follow the steps outlined in the **Processing an Award Renouncement** job aid * Enter information to terminate the current award * Generate the award |  |
| ****Demonstration—Prepare the Decision Notice Confirming Renouncement****  Indicates a demonstration should be performed  Ensure the decision notice contains required information:   * M21-1 X.iv.4.3.d. (Notification of Renouncement of the Right to Pension or Parents DIC) * M21-1 X.iv.4.3.e. (Notification of Renouncement of the Right to Benefits Other Than Pension or Parents DIC |  |
| ****Demonstration—Submit the Claim to the Authorizer****   * Route the claim to the Authorizer through the National Work Queue * Save the letter based on local procedures   **Indicates you should demonstrate an action** |  |

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| Lesson Summary    Time Allowed: 10 minutes |  |
| What’s Next?   * **Complete the Process a Request for Renouncement of Benefits evaluation course using TMS ID 4408420** |  |