



## PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course  
Phase 5: Stages of a Claim  
Part 1: Determine Eligibility

# **Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits**

Trainee Guide

July 11, 2017

Version 1.0

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

**Verify Proof of Death of Veteran for Survivors' Benefits**

**Lesson Overview**

Topic	Description
Time Estimate:	1 hour.
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 prepare PMC VSRs to verify proof of the cause of death of the Veteran for survivors' pension claims.
Prerequisite Training Requirements:	Prior to taking the Determine Dependency Eligibility: Parent lesson, you must complete PMC VSR Core Course Phases 1–4, Phase 5, Part 1, Lessons 1–20. (Refer to the <b>Master Course Map</b> learning aid for a list of lessons.)
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> <li>• <b>Master Course Map</b> learning aid</li> <li>• 38 CFR 3.211 (Death)</li> <li>• 38 CFR 3.202 (Evidence from Foreign Countries)</li> </ul>
Knowledge Check:	Phase 5: Stages of a claim, Part 1(d): Beyond Basic Eligibility and Ready to Rate
Technical Competencies:	<ul style="list-style-type: none"> <li>• Program Benefits and Eligibility (PMC VSR)</li> <li>• Processing Claims (PMC VSR)</li> </ul>
Lesson Objectives:	Verify proof of death of Veteran. <ul style="list-style-type: none"> <li>• Determine if proof of death is of record.</li> <li>• Determine to develop for proof of death.</li> <li>• Establish death of a Veteran.</li> </ul>
What You Need:	<ul style="list-style-type: none"> <li>• Trainee guide</li> <li>• <b>Master Course Map</b> learning aid</li> <li>• Access to VBA Intranet</li> <li>• Pen and paper</li> </ul>

## Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits Trainee Guide

Topic	Description
	<ul style="list-style-type: none"> <li>• Access to the following systems:               <ul style="list-style-type: none"> <li>○ SHARE</li> <li>○ VVA</li> <li>○ VBMS</li> </ul> </li> <li>• Access to an electronic example of VA Form 21-534EZ, Application for DIC, Death Pension, and/or Accrued Benefits</li> </ul>

PowerPoint Slides	Notes
<p><b>Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits</b></p>	
<p><b>You Are Here</b></p> <pre> graph TD     P1[PHASE 5 PART 1 Determine Eligibility] --&gt; P2[PHASE 5 PART 2 Process a Claim]     P2 --&gt; P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision]     P3 --&gt; P4[PHASE 5 PART 4 Prepare Decision Notice]     P4 --&gt; P5[PHASE 5 PART 5 Award Adjustments]          P1 --&gt; P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim]     P1a --&gt; P1b[PHASE 5 PART 1b Basic Eligibility]     P1b --&gt; P1c[PHASE 5 PART 1c Income Eligibility]     P1c --&gt; P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate]          style P1 stroke:#000,stroke-width:2px     style P1a stroke:#000,stroke-width:2px     style P1b stroke:#000,stroke-width:2px     style P1c stroke:#000,stroke-width:2px     style P1d stroke:#000,stroke-width:2px   </pre>	

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Beyond Basic Eligibility and Ready to Rate</b></p> <ul style="list-style-type: none"><li>• <b>Verify Proof of Death of Veteran for Survivors' Benefits</b></li><li>• Apply Liberalizing Law to Pension Eligibility</li><li>• Apply Rules for Vet Married to Vet Cases</li><li>• Determine Accrued Benefits Eligibility</li><li>• Determine Burial Benefits Eligibility</li><li>• Determine Month of Death (MOD) Eligibility</li><li>• Overview of Ready to Rate</li><li>• Determine Eligibility for DIC and Parents' DIC</li></ul>	
<p><b>Overview—Proof of Veteran's Death</b></p> <ul style="list-style-type: none"><li>• Initiated by:<ul style="list-style-type: none"><li>○ Receipt of application for survivors' pension and benefits</li><li>○ Veteran meets service requirements</li></ul></li><li>• Must be established by evidence</li></ul>	

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Scenario—What Type of Evidence Can be Accepted for Proof of Death?</b></p> <p>You receive an application for survivors' pension from Lindsay Clarke, the surviving widow of Veteran Andrew Clarke. When reviewing the application in VBMS, you notice that the application states that the Veteran died abroad. Based on this information, what evidence can be provided for proof of death?</p>	
<p><b>Scenario—What Type of Evidence Can be Accepted for Proof of Death?</b></p> <p><b>Answers</b></p> <p>You receive an application for survivors' pension from a Lindsay Clarke, the surviving widow of Veteran, Andrew Clarke. When reviewing the application in VBMS, you notice that the application states that the Veteran died abroad. Based on this information, what evidence can be provided for proof of death?</p>	
<p><b>Technical Competencies</b></p> <ul style="list-style-type: none"> <li>• Program Benefits and Eligibility (PMC VSR)</li> <li>• Processing Claims (PMC VSR)</li> </ul>	

## Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits Trainee Guide

PowerPoint Slides	Notes
<p><b>Lesson Objectives</b></p> <p>Verify proof of death of Veteran.</p> <ul style="list-style-type: none"> <li>• Determine if proof of death is of record.</li> <li>• Determine to develop for proof of death.</li> <li>• Establish death of a Veteran.</li> </ul>	
<p><b>Knowledge Check</b></p> <pre> graph TD     A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --&gt; B{Phase 5 Part 1a Knowledge Check}     A --&gt; C[PHASE 5 PART 1b Basic Eligibility]     C --&gt; D{Phase 5 Part 1b Knowledge Check}     C --&gt; E[PHASE 5 PART 1c Income Eligibility]     E --&gt; F{Phase 5 Part 1c Knowledge Check}     E --&gt; G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate]     G --&gt; H{Phase 5 Part 1d Knowledge Check}     style H stroke:#0000FF,stroke-width:2px     </pre>	
<p><b>Why Is Verifying Proof of Death Important?</b></p> <ul style="list-style-type: none"> <li>• Verifying proof of death of a Veteran is important because a surviving child, spouse, or parent of a Veteran can receive benefits only if proof of death is received showing the Veteran's cause of death.</li> <li>• Benefits include:             <ul style="list-style-type: none"> <li>○ Survivors' pension</li> <li>○ DIC</li> </ul> </li> </ul>	

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Types of Proof</b></p> <ul style="list-style-type: none"><li>• Public record</li><li>• Coroner report</li><li>• Death certificate</li><li>• Hospital or government institution</li><li>• Member of uniformed service</li><li>• Death occurs abroad</li></ul>	
<p><b>Claim 1—Is The Proof of Death of Record?</b></p> <ul style="list-style-type: none"><li>• Instructions:<ul style="list-style-type: none"><li>○ Review the claim provided in VBMS.</li><li>○ Based on information provided, determine:<ul style="list-style-type: none"><li>▪ If the claim contains proof of death</li><li>▪ If the proof of death provided is satisfactory</li><li>▪ If development is needed</li></ul></li><li>○ Explain your answer.</li></ul></li><li>• Time allowed: 10 min.</li></ul>	






**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

PowerPoint Slides	Notes
<p><b>Claim 1—Is The Proof of Death of Record? Answers</b></p> <ol style="list-style-type: none"> <li>1. Does the claim contain proof of death?</li> <li>2. Is the proof of death satisfactory?</li> <li>3. Is further development needed?</li> </ol>	
<p><b>Verifying Proof of Death</b></p> <ul style="list-style-type: none"> <li>• BIRLS VID screen via SHARE</li> <li>• Compare date of death to proof provided</li> <li>• BIRLS and SHARE print screen must show same date of death</li> <li>• Homicide</li> </ul>	
<p><b>Group Activity—Verify Proof of Death</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Divide into groups of three.</li> <li>○ Access CPKM to use the eCFR to complete the exercise.</li> <li>○ Review Claim 2 and Claim 3.</li> <li>○ Verify proof of death.</li> <li>○ Determine if development is needed.</li> </ul> </li> <li>• Time allowed: 10 min.</li> </ul>	

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits  
Trainee Guide**

PowerPoint Slides	Notes
<p><b>Claim 2—Verify Proof of Death</b></p> <ul style="list-style-type: none"> <li>• Could the proof of death be verified with what was provided?</li> <li>• Is further development needed to verify the proof of death?</li> </ul>	
<p><b>Claim 3—Verify Proof of Death</b></p> <ul style="list-style-type: none"> <li>• Could the proof of death be verified with what was provided?</li> <li>• Is further development needed to verify the proof of death?</li> </ul>	
<p><b>Proof of Death Review</b></p> <ul style="list-style-type: none"> <li>• Proof of death of record</li> <li>• Types of proof</li> <li>• Verifying proof of death</li> </ul>	
<p><b>Questions?</b></p> 	
<p><b>What's Next</b></p> <ul style="list-style-type: none"> <li>• Phase 5, Part 1, Lesson 22: Apply Liberalizing Law to Pension Eligibility</li> <li>• Review of references provided in this lesson</li> </ul>	