



PENSION AND FIDUCIARY SERVICE

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

Lesson 26: Determine Eligibility for Month of Death Benefit

Trainee Guide

July 11, 2017

Version 1.0

**Lesson 26: Determine Eligibility for Month of Death Benefit
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Determine Eligibility for Month of Death Benefit

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 you to determine a surviving spouse's eligibility for MOD benefit.
Prerequisite Training Requirements:	Prior to taking the Determine Eligibility for Month of Death Benefit lesson, you must complete PMC VSR Core Course Phases 1–4 and Phase 5, Part 1, Lessons 1–25. (Refer to the Master Course Map 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"> • Master Course Map learning aid • M21-1 III.iii.5.A.1.c (Importance of Establishing the Relationship of an Individual to a Veteran) • M21-1 IV.iii.3.A.5 (Determining the Surviving Spouse's Entitlement to Benefits for the Month Of Death [MOD]) • 38 CFR 3.20 (Surviving spouse's benefit for month of veteran's death) • Accrued Benefits job aid
Knowledge Check:	Phase 5: Stages of a Claim, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR)

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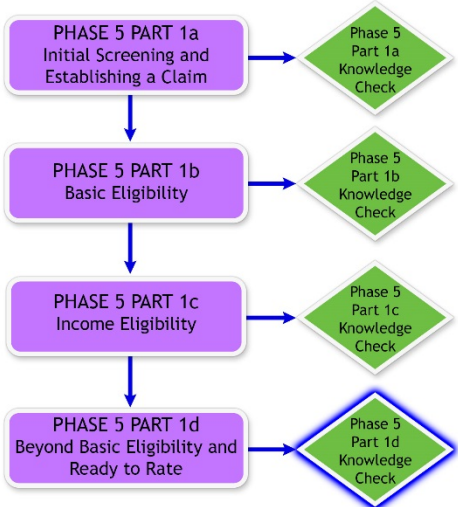
Topic	Description
Lesson Objectives:	<p>Determine whether the surviving spouse is eligible for MOD benefits.</p> <ul style="list-style-type: none"> • Determine whether Veteran was receiving pension or compensation benefits at time of death. • Determine whether MOD payment was made. • Check whether Veteran was married to claimant at time of death.
What You Need:	<ul style="list-style-type: none"> • Trainee guide • Master Course Map learning aid • Pen and paper • Access to VBA intranet • Access to the following systems: <ul style="list-style-type: none"> ○ SHARE ○ VBMS ○ MAP-D ○ VETSNET • Access to the Accrued Benefits job aid from VSR Assistant

PowerPoint Slides	Notes
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PowerPoint Slides	Notes
<p>You Are Here</p> <pre> graph TD subgraph MainFlow P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim] P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P3 --> P4[PHASE 5 PART 4 Prepare Decision Notice] P4 --> P5[PHASE 5 PART 5 Award Adjustments] end subgraph SubFlow P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim] --> P1b[PHASE 5 PART 1b Basic Eligibility] P1b --> P1c[PHASE 5 PART 1c Income Eligibility] P1c --> P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] end P1 --- P1a P1d --- P1 </pre>	
<p>Beyond Basic Eligibility and Ready to Rate</p> <ul style="list-style-type: none"> • Verify Proof of Death of Veteran for Survivors' Benefits • Apply Liberalizing Law to Pension Eligibility • Process Veteran-Married-to-Veteran Cases • Determine Accrued Benefits Eligibility • Determine Burial Benefits Eligibility • Determine Eligibility for Month Of Death (MOD) Benefit • Overview of Ready to Rate • Determine Eligibility for DIC and Parents' DIC 	
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) 	

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PowerPoint Slides	Notes
<p>Lesson Objectives</p> <p>Determine whether the surviving spouse is eligible for MOD benefits.</p> <ul style="list-style-type: none"> • Determine whether Veteran was receiving pension or compensation benefits at time of death. • Determine whether MOD payment was made to the surviving spouse. • Check whether Veteran was married to claimant at time of death. 	
<p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B[PHASE 5 PART 1b Basic Eligibility] B --> C[PHASE 5 PART 1c Income Eligibility] C --> D[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] A --> A1{Phase 5 Part 1a Knowledge Check} B --> B1{Phase 5 Part 1b Knowledge Check} C --> C1{Phase 5 Part 1c Knowledge Check} D --> D1{Phase 5 Part 1d Knowledge Check} style D1 stroke:#000,stroke-width:2px </pre> <p>The diagram shows a vertical flow of four purple rounded rectangular boxes representing the phases of the process. Each box is connected to a green diamond-shaped knowledge check box to its right by a blue arrow pointing right. The phases are: PHASE 5 PART 1a (Initial Screening and Establishing a Claim), PHASE 5 PART 1b (Basic Eligibility), PHASE 5 PART 1c (Income Eligibility), and PHASE 5 PART 1d (Beyond Basic Eligibility and Ready to Rate). The knowledge check boxes are labeled 'Phase 5 Part 1a Knowledge Check' through 'Phase 5 Part 1d Knowledge Check'. The final knowledge check box (1d) has a blue border, while the others are green.</p>	

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<p>Why Determining Eligibility for MOD Benefit Is Important</p> <ul style="list-style-type: none">• If eligible, surviving spouse is entitled to benefit• Veteran must have been receiving pension or compensation benefits at time of death• May require development	
<p>What Is MOD Benefit?</p> <ul style="list-style-type: none">• When a Veteran passes away, his or her benefits are terminated the first of the month of death. That month of benefits is called the Month Of Death (MOD).• The Veteran's rate for the month of death is an entitlement available only to the surviving spouse of the Veteran.• The payment amount represents the disability or pension payment amount that the Veteran was entitled to receive the month that he or she died.	

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<p>Requirements for MOD Benefit</p> <ul style="list-style-type: none">• The surviving spouse is eligible to receive the MOD benefit if the Veteran receiving compensation or pension died on or after January 1, 1997.• The surviving spouse is eligible for the MOD benefit for that month in an amount equal to the amount of compensation or pension the Veteran would have received for that month but for his or her death.	
<p>Verify Whether Veteran Was Receiving Pension or Compensation at Time of Death</p> <ul style="list-style-type: none">• Review Corporate Record in SHARE• Ensure that Veteran was receiving pension or compensation benefits at time of death• Can also be verified through payment history, if needed	

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<p>Determine Whether MOD Payment Has Been Made</p> <ul style="list-style-type: none">• Review SHARE or VETSNET for payee code• Payee code 10 indicates spouse• No payee code if spouse has not been paid• End Product (EP) codes 147, 197, or 297	
<p>Veteran Married to Claimant at Time of Death</p> <ul style="list-style-type: none">• Review SHARE• Development may be required to establish relationship	

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<p>Scenario—Is the Surviving Spouse Eligible for MOD Benefit?</p> <p>Kitty Tanglewood is a surviving spouse that applied for her late Veteran husband's MOD payment. On August 13, 2015, you received her Statement in Support of Claim, VA Form 21-4138, stating that she would like the Veteran's rate for the month of his death. Kitty has not submitted a claim for DIC, Survivors Pension, or accrued benefits. The Veteran passed away on July 11, 2015, and was in receipt of service-connected compensation benefits at the 50% disabled rate, receiving \$917.13 monthly as a Veteran with one dependent (spouse). You review the payment history and the Veteran's award and determine that an automatic MOD payment was not released. You review the claim and determine that Kitty is on the Veteran's award. Her information is of record.</p> <p>Based on the information provided, can you grant MOD benefit?</p>	

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<p>Scenario—Is the Surviving Spouse Eligible for MOD Benefit? Answer</p> <p>Based on the information provided, can you grant MOD benefit?</p>	
<p>Claim 2 Activity—Determine If Spouse Is Eligible for MOD Benefit</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three.○ Access CPKM to use the eCFR and M21-1 to complete the exercise.○ Review Claim 2.○ Complete the Claim 2 Activity Worksheet: Determine If Spouse Is Eligible for MOD Benefit for each claim.• Time allowed: 15 min.	

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Claim Activity Worksheet: Determine If Spouse Is Eligible for MOD Benefit

For each claim provided by the instructor, answer the questions below. Show your work.

1. Was the Veteran receiving benefits at time of death?


2. Had an MOD payment been made?

3. Is the claimant an eligible surviving spouse?

4. Is development necessary?

PowerPoint Slides	Notes
<p>Claim 2 Activity—Determine If Spouse Is Eligible for MOD Benefit Debrief</p> <p>Compare your findings with another group.</p> <ul style="list-style-type: none">• Was the Veteran receiving benefits at time of death?• Had an MOD payment been made?• Is the claimant an eligible surviving spouse?• Is development necessary?	

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PowerPoint Slides	Notes
<p>Determine Eligibility for MOD Benefit Review</p> <ul style="list-style-type: none">• MOD Requirements• Verify whether Veteran was receiving pension at time of death• Determine whether MOD payment was made• Determine whether Veteran was married to claimant at time of death	
<p>Questions?</p> 	
<p>What's Next</p> <ul style="list-style-type: none">• Lesson 27: Overview of Ready to Rate• Review of all references and job aids provided in this lesson	