Pension and fiduciary service

PMC VSR Advanced Core Course Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate

Phase 5, Part 1(d) Knowledge Check Preparation

Trainee Guide

March 2022

Phase 5, Part 1(d) Knowledge Check Preparation

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 3 hours |
| Purpose of the Knowledge Check preparation: | This knowledge check preparation is part of the entry-level curriculum, Advanced Core Course for PMC VSRs. The purpose of this knowledge check preparation is to get PMC VSRs ready to take the Phase 5, Part 1(d) Knowledge Check. |
| Prerequisite Training Requirements: | Prior to taking the Phase 5, Part 1(d) Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–4 and Phase 5 lessons 1–28. Refer to the PMC VSR Program of Instruction (POI) for a list of lessons. |
| Target Audience: | This knowledge check preparation is for entry-level PMC VSRs. |
| References: | See Phase 5, Part 1(d) Knowledge Check Preparation: Appendix A for applicable references and job aids |
| Technical Competencies: | * Program Benefits and Eligibility (PMC VSR) * VBA Applications (PMC VSR) * Processing Claims (PMC VSR) |
| Knowledge Check: | Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check |
| What You Need: | * See Phase 5, Part 1(d) Knowledge Check Preparation: Appendix A for applicable references and job aids * Appendix B: Worksheet * Appendix C: Question and Answer Worksheet * Access to CPKM * Access to VSR Assistant |

| PowerPoint Slides | Notes |
| --- | --- |
| Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check Preparation |  |
| Why It Matters!   * Knowledge Checks matter because PMC VSRs are responsible for completing tasks beyond determining basic eligibility and determining if a claim is ready to rate. This lesson helps gauge the knowledge base. |  |
| ****Phase 5, Part 1(d) Lessons**** |  |
| Knowledge Check Preparation Overview  **This preparation will consist of the following:**   * **Lesson objectives review** * **Partner activities** * **Question/answer forum** |  |
| Verify Proof of Death of Veteran for Survivor’s Benefits  Verifying proof of death is used to determine eligibility for survivor’s pension, DIC claims, accrued claims, and burial benefits. |  |
| Verify Proof of Death of Veteran for Survivor’s Benefits Objectives   * Determine if proof of death is of record. * Determine to develop for proof of death. * Establish death of a Veteran. |  |
| Verify Proof of Death of Veteran Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding verifying proof of death of a Veteran.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity—What Do I Need to Verify Proof of Death?   * Instructions:   + Divide into pairs.   + Review Claim 1 provided by the instructor.   + Complete Appendix B: Part A—What Do I Need to Verify Proof of Death?   + Use the references in Appendix A, *Verify Proof of Death for Survivor’s Benefits*   + Be prepared to share your finished activity with the class. * Time allowed: 7-10 minutes |  |
| Partner Activity—What Do I Need to Verify Proof of Death? Answers   1. Does the information provided in the example claim contain proof of death? If so, list the piece of information.   Answer provided by instructor based on example claim selected.   1. Is the proof of death provided satisfactory?   Answer provided by instructor based on example claim selected.   1. If development is needed, what information do you need to verify proof of death and establish the death of the Veteran?   Answer provided by instructor based on example claim selected. |  |
| Apply Liberalizing Law to Pension Eligibility   * At times, it may be necessary to apply liberalizing law to pension claims. * It applies to:   + Cases involving pending or previously denied claims   + Original claims filed after the change in law or administrative issue |  |
| Apply Liberalizing Law to Pension Eligibility Objectives  Apply liberalizing law objectives:   * Determine whether the Veteran meets criteria for liberalizing law. * Determine whether to apply liberalizing legislation eligibility. |  |
| Apply Liberalizing Law to Pension Eligibility Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding liberalizing law.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Group Activity—Should Liberalizing Law Be Applied?   * Instructions:   + Review Claim 2 as a class.   + Use the references in Appendix A, *Determine Whether to Apply Liberalizing Law*.   + Determine if liberalizing law should be applied.   + Raise your hand when you know the answer and be prepared to explain it. * Time allowed: 7-10 minutes |  |
| Process Veteran-Married-to-Veteran Cases   * Veteran-married-to-Veteran claims are two awards combined, unless otherwise requested * A special combined maximum annual pension rate (MAPR) applies to Veterans who are married to each other * The combined rate is the same as it is for a Veteran with a dependent, unless both Veterans are eligible for SMP |  |
| Process Veteran-Married-to-Veteran Cases Objectives  Process a Veteran-married-to-Veteran claim.   * Identify Veteran-married-to-Veteran cases. * Calculate the award payment for a Veteran-married-to-Veteran claim. |  |
| Process Veteran-Married-to-Veteran Cases Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding Veteran-married-to-Veteran cases.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity— Process a Veteran-Married-to-Veteran Claim   * Instructions:   + Divide into pairs.   + Review Claim 3 provided by the instructor.   + Complete Appendix B: Part B—Veteran-Married-to-Veteran Claim.   + Use the **Veteran Married to Veteran** job aid to help answer the questions.   + Be prepared to share your finished activity with the class. * Time allowed: 7-10 minutes |  |
| Partner Activity—Veteran-Married-to-Veteran Claim Answers   1. Calculate the combined MAPR.   Answer provided by instructor based on example claim selected.   1. Add the Veteran’s spouse as a dependent.   Answer provided by instructor based on example claim selected.   1. Confirm the general award.   Answer provided by instructor based on example claim selected.   1. Flash the award, if necessary.   Answer provided by instructor based on example claim selected. |  |
| Determine Accrued Benefits Eligibility  Eligibility for accrued benefits depends on the following:   * Date of claim * Date of death of Veteran * Relationship of claimant to the Veteran or reimbursement |  |
| **Determine Accrued Benefits Eligibility Objectives**   * Define key terms related to accrued benefits * Determine basic entitlement to accrued benefits * Determine control and jurisdiction of accrued claims * Determine if accrued benefits are payable * Determine the proper claimant for accrued benefits * Identify the types of accrued benefits claims |  |
| Accrued Benefits Eligibility Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding accrued benefits eligibility.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Small Group Activity–Accrued Benefits Eligibility   * Instructions:   + Divide into groups of three.   + Review Claims 4 and Claim 5 provided by the instructor.   + Using the **Accrued Benefits** job aid, determine if the claimant in each claim is eligible for accrued benefits.   + Prepare to share your findings with the class and discuss any differences. * Time allowed: 7-10 minutes |  |
| Determine Burial Benefits Eligibility (1 of 2)   * The plot and/or transportation allowances can only be paid if SC death, NSC death, VA hospitalization death or Unclaimed Veteran remains​ is also payable * Plot or interment expenses are those expenses associated with the final disposition of the remains * VA does not pay plot allowance whenever the plot location is a private residence |  |
| Determine Burial Benefits Eligibility (2 of 2)   * When transportation reimbursement is allowable, VBA may pay for expenses relating to transportation of the Veterans remains to his or her final resting place * Claims for the NSC burial allowance must be filed within two years of the date of permanent burial or cremation of the Veteran * There is no time limit for applying for SC burial allowance​, VA hospitalization death burial allowance​, Plot or interment allowance​, Transportation reimbursement ​ |  |
| Determine Burial Benefits Eligibility Objectives   * Define types of burial benefits * Determine if eligibility requirements for burial benefits are met * Identify claimant eligible for payment * Determine if eligibility requirements for SC burial are met * Determine if eligibility requirements for NSC burial benefits are met * Determine if eligibility for VA hospitalization death burial benefits are met * Determine whether development is required for burial-related information * Determine whether a burial claim requires rating activity |  |
| Burial Benefits Eligibility Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding burial benefits eligibility.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity–Burial Benefits Eligibility   * Instructions:   + Divide into pairs.   + Review Claim 6 provided by the instructor.   + Answer the questions in Appendix B: Part C—Burial Benefit to determine if the claimant is eligible for burial benefits.   + Use the **Burial Benefits Eligibility** job aid.   + Be prepared to share your finished activity with the class. * Time allowed: 7-10 minutes |  |
| Partner Activity–Burial Benefits Eligibility Answers (1 of 3)   1. Who is the claimant?   Answer provided by instructor based on example claim selected.   1. What kind of claim is this?   Answer provided by instructor based on example claim selected.   1. Is the claimant eligible for SC burial benefits?   Answer provided by instructor based on example claim selected. |  |
| Partner Activity–Burial Benefits Eligibility Answers (2 of 3)   1. Is the claimant eligible for NSC burial benefits?   Answer provided by instructor based on example claim selected.   1. Is the claimant eligible for VA hospitalization death burial benefits?   Answer provided by instructor based on example claim selected.   1. Is the claimant eligible for transportation reimbursement?   Answer provided by instructor based on example claim selected. |  |
| Partner Activity–Burial Benefits Eligibility Answers (3 of 3)   1. Is the claimant eligible for a plot allowance?   Answer provided by instructor based on example claim selected.   1. Is development required to determine eligibility? If so, for what?   Answer provided by instructor based on example claim selected.   1. Should this claim be submitted to the rating activity? Why or why not?   Answer provided by instructor based on example claim selected. |  |
| Determine Month of Death (MOD) Eligibility   * When a Veteran passes away, his or her benefits are terminated the first of the month of death which is called the Month of Death (MOD) * ​The MOD payment amount represents the disability payment amount that the Veteran was entitled to receive for the month that he or she died (gross benefit) * The Veteran's rate for the month of death is an entitlement available only to the surviving spouse of the Veteran |  |
| **Determine MOD Eligibility Objectives**   * Determine whether the surviving spouse is eligible for MOD benefits * 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 |  |
| MOD Benefit Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding month of death benefit.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity—MOD Benefit   * Instructions:   + Divide into pairs.   + Review Claim 7 provided by the instructor.   + Answer the questions in Appendix B: Part D—Month of Death to determine whether the surviving spouse is eligible for MOD.   + Be prepared to share your finished activity with the class. * Time allowed: 7-10 minutes |  |
| Partner Activity—MOD Answers   1. Was the Veteran receiving benefits at time of death?   Answer provided by instructor based on example claim selected.   1. Had an MOD payment been made?   Answer provided by instructor based on example claim selected.   1. Is the claimant an eligible surviving spouse?   Answer provided by instructor based on example claim selected.   1. Is development necessary?   Answer provided by instructor based on example claim selected. |  |
| Overview of Ready to Rate   * The rating decision is needed to determine whether a claimant is entitled to benefits for the issues under review based on the evidence of record * The rating decision provides:   + A formal determination regarding one or more issues of benefit entitlement   + Statement of the decision(s), and   + An explanation supporting each decision |  |
| Overview of Ready to Rate Objectives   * Explain why a claim requires a rating decision * Identify the types of claims that require a rating decision * List the required elements for a claim that is ready to rate |  |
| Ready to Rate Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding ready to rate.   + Questions will be answered at the end of the Knowledge Check preparation. * Time allowed: 5 minutes |  |
| Partner Activity—Overview of Ready to Rate   * Instructions:   + Divide into pairs.   + Review Claim 8 provided by the instructor.   + Answer the questions in Appendix B: Part E—Overview of Ready to Rate to determine whether the claim needs a rating decision and what is needed for the rating decision.   + Be prepared to share your finished activity with the class. * Time allowed: 7-10 minutes |  |
| Partner Activity—Overview of Ready to Rate Answers   1. What is the type of claim?   Answer provided by instructor based on example claim selected.   1. Is a rating decision required? If so, why?   Answer provided by instructor based on example claim selected.   1. Does the claim require development to be ready to rate? If yes, what evidence is needed?   Answer provided by instructor based on example claim selected. |  |
| Determine Eligibility for DIC and Parents’ DIC   * DIC is a monthly payment made to a surviving spouse, child, or parent because of a service connected (SC) death per 38 U.S.C. 1310, **or**   + to a surviving spouse or child because the Veteran had been rated as totally disabled due to a SC disability prior to his/her death, typically for at least ten years, per 38 U.S.C. 1318, **or**   + to a surviving spouse, child, or parent because of death due to VA medical treatment, per 38 U.S.C. 1151, **or**   + to a surviving spouse, child, or parent because of an in-service death |  |
| Determine Eligibility for DIC and Parents’ DIC Objectives   * Determine whether the surviving spouse, dependent child, or parent meets the eligibility criteria for DIC * Determine whether the claimant is claiming DIC under 38 U.S.C. 1310, 1318, or 1151 * Determine whether the evidence of death is on file * Determine whether cause of death is on file * Determine the relationship to a Veteran for the purpose of receiving DIC benefits * Determine eligibility for DIC claim * Determine eligibility for parents’ DIC claim |  |
| Eligibility for DIC and Parents’ DIC Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding DIC and Parents’ DIC.   + Questions will be answered at the end of the Knowledge Check preparation. * Time allowed: 5 minutes |  |
| Group Activity—Determine Eligibility for DIC and Parents’ DIC   * Instructions:   + Review Claim 9 as a class.   + Use the references and job aids in Appendix A, *Determine Whether the Surviving Spouse, Dependent Child, or Parent Meets the Eligibility Criteria for DIC*.   + Work together as a class to determine whether the claimant meets the eligibility for DIC. * Time allowed: 10-15 minutes |  |
| Determine Substitution Eligibility   * A standard application is not required to request to substitute * A request to substitute, from eligible persons, is deemed to be included when VA receives a   + claim for accrued benefits, Survivors Pension, or Dependency and Indemnity Compensation (DIC)   + a written request containing intent, name of substitute and the name, claim number, social security number or appeal number of the deceased claimant |  |
| Determine Substitution Eligibility Objectives   * Define key terms relating to a request to substitute​ * Establish control of a request to substitute​ * Determine eligibility to request substitution​ * Understand the rights of the substitute claimant |  |
| Determine Substitution Eligibility Objectives   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding substitution eligibility.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Determine Substitution Eligibility Objectives   * Instructions:   + Divide into groups of three or four.   + Review the claim provided by the instructor.   + Work together as a class to determine whether the claimant is eligible for substitution.   + Be prepared to share your answers with the class. * Time allowed: 7-10 minutes |  |
| **Question and Answer Forum**   * Instructions:   + Divide into groups of three or four.   + Review the Appendix C: Question and Answer Worksheet with your group.   + Mark any questions that need further clarification from the instructor.   + Be prepared to share your answers with the class. * Time allowed: 10-15 minutes |  |
| Question and Answer Clarification  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. |  |
| **What’s Next?**  Phase 5, Part 1(d): Beyond Basic Eligibility and Ready to Rate Knowledge Check |  |