



## 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**

## Lesson Plan

July 11, 2017

Version 1.0

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**Lesson Plan**

**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 Verify Proof of Death of Veteran for Survivors' Benefits lesson, trainees 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>• Lesson plan</li> <li>• <b>Master Course Map</b> learning aid</li> <li>• Slides</li> <li>• Projector</li> </ul>

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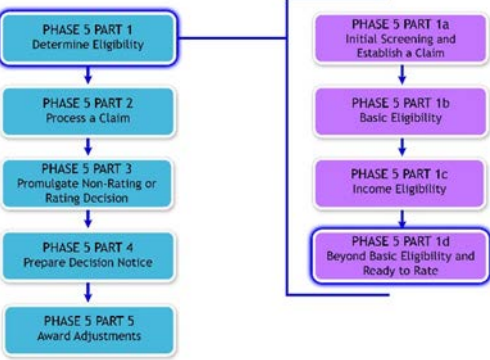


Topic	Description
	<ul style="list-style-type: none"> <li>• Access to VBA Intranet</li> <li>• Pen and paper or access to a whiteboard</li> <li>• Access to the following systems:               <ul style="list-style-type: none"> <li>○ SHARE</li> <li>○ VVA</li> <li>○ VBMS</li> </ul> </li> <li>• Access to two Academy mode example claim applications, including evidence, to demonstrate the following:               <ul style="list-style-type: none"> <li>○ Example Claim 1 Verify proof of death (no development needed) (pmc_vsr_case_2)</li> <li>○ Example Claim 2 Verify proof of death (development needed) (pmc_vsr_case_7)</li> <li>○ Example Claim 3 Verify proof of death (pmc_vsr_excerpt_r)</li> </ul> </li> <li>• Appendix A showing two examples proof of death.</li> <li>• Provide answers to the questions for each of the example applications.               <ul style="list-style-type: none"> <li>○ Example Claim 1 (pmc_vsr_case_2)—See slide 13</li> <li>○ Example Claim 2 (pmc_vsr_case_7)—See slides 16 and 17</li> <li>○ Example Claim 3 (pmc_vsr_excerpt_r)—See slides 16 and 17.</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>

**Instructor Notes**



This lesson is the first in the beyond basic eligibility and ready to rate process. This lesson provides trainees with references, resources, examples, and practice to verify proof of the cause of death of the Veteran for survivors' pension claims.

<b>PowerPoint Slides</b>	<b>Instructor Activities</b>
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PowerPoint Slides	Instructor Activities
<p><b>Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits</b></p>	<p><b>DISPLAY</b> slide</p> <p>1. "Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits"</p> <p><b>INTRODUCE</b> yourself as the instructor.</p> <p><b>INTRODUCE</b> the lesson.</p>
<p><b>You Are Here</b></p> 	<p><b>DISPLAY</b> slide</p> <p>2. "You Are Here"</p>  <p><b>REFER</b> trainees to the <b>Master Course Map</b> learning aid in the Trainee Guide.</p> <p><b>EXPLAIN</b> where the trainees are in the phase, what they have completed, and where they are headed next.</p> <p><b>INFORM</b> trainees that Phase 5, Part 1: Determine Eligibility contains four subparts. The fourth subpart contains several lessons that focus on eligibility issues that are beyond basic.</p>  <p><b>EMPHASIZE</b> to trainees that each of these lessons relates to the others as part of the tasks beyond basic eligibility and determining if a claim is ready to rate.</p>


**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits**  
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PowerPoint Slides	Instructor Activities
<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>DISPLAY</b> slide</p> <p><b>3.</b> "Beyond Basic Eligibility and Ready to Rate"</p> <p><b>REMINDE</b> trainees of the basic eligibility process.</p> <p><b>EXPLAIN</b> that they will be learning about the tasks that go beyond basic eligibility as well as how to determine if a claim is ready to rate.</p> <p><b>INFORM</b> trainees that this lesson will focus on how to verify the proof of death of a Veteran in order for a surviving spouse, child, or parent to receive survivors' benefits or DIC benefits.</p>
<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>	<p><b>DISPLAY</b> slide</p> <p><b>4.</b> "Overview—Proof of Veteran's Death"</p> <p><b>SHOW</b> a completed example of VA Form 21-534EZ (use pmc_vsr_case_2).</p>  <p><b>REMINDE</b> trainees of service requirements for benefits.</p>  <p><b>EMPHASIZE</b> that proof of death must be established using evidence. Types of evidence will be covered later in the lesson.</p>

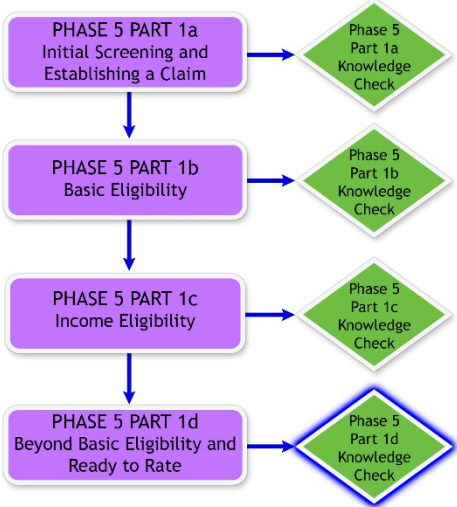

**Lesson 21: Verify Proof of Death of Veteran for Survivors' Benefits**  
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<b>PowerPoint Slides</b>	<b>Instructor Activities</b>
<p><b>Scenario—What Type of Evidence Can be Accepted for Proof of Death?</b></p> <p>You receive an application for survivors' 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>DISPLAY</b> slide</p> <p>5. "Scenario—What Type of Evidence Can be Accepted for Proof of Death?"</p>  <p><b>REFER</b> to the CPKM and have them navigate to the following CFR references:</p> <ul style="list-style-type: none"><li>• 38 CFR 3.211 (Death)</li><li>• 38 CFR 3.202 (Evidence from Foreign Countries)</li></ul> <p><b>READ</b> the scenario with trainees.</p>  <p><b>ASK</b> the trainees to raise their hands when they have the answer. Select the first trainee to raise his or her hand.</p> <p><b>NOTE</b> the answers are on the next slide.</p>

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PowerPoint Slides	Instructor Activities
<p><b>Scenario—What Type of Evidence Can be Accepted for Proof of Death? 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> <ul style="list-style-type: none"> <li>• <i>United States consular report of death bearing the signature and seal of the United States consul</i></li> <li>• <i>Authenticated copy of the public record of death</i></li> <li>• <i>Official report of death from the head of the department concerned, where the deceased person was, at the time of death, a civilian employee of such department</i></li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>6.</b> "Scenario—What Type of Evidence Can be Accepted for Proof of Death? Answers"</p> <p><b>REVIEW</b> the question in the scenario with trainees.</p> <p><b>PROVIDE</b> any clarification or explanation needed based on the answer given by the trainee selected.</p> <div style="text-align: center;">  </div> <p><b>ASK</b> the trainees if they have any questions about the scenario and how the conclusion was reached.</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>	<p><b>DISPLAY</b> slide</p> <p><b>7.</b> "Technical Competencies"</p> <p><b>REVIEW</b> technical competencies with trainees.</p>

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PowerPoint Slides	Instructor Activities
<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>DISPLAY</b> slide</p> <p><b>8.</b> "Lesson Objectives"</p> <p><b>PRESENT</b> the objectives for the lesson.</p>
<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:#000,stroke-width:2px     </pre>	<p><b>DISPLAY</b> slide</p> <p><b>9.</b> "Knowledge Check"</p> <p><b>EXPLAIN</b> that a Knowledge Check will be given at the end of Phase 5, Part 1d that covers all material learned in Phase 5, Part 1d.</p>  <p><b>REFER</b> to the <b>Master Course Map</b> learning aid, <i>Lessons by Phase</i> section, to review the lessons included within the Knowledge Check.</p>



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PowerPoint Slides	Instructor Activities
<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>	<p><b>DISPLAY</b> slide  <b>10.</b> "Why Is Verifying Proof of Death Important?"</p>  <p><b>REFER</b> trainees to the CFR regarding evidence needed for proof of death:</p> <ul style="list-style-type: none"> <li>• 38 CFR 3.211 (Death)</li> <li>• 38 CFR 3.202 (Evidence from Foreign Countries)</li> </ul> <p>Give trainees a few minutes to read through the sections, and then choose a trainee to summarize each section.</p> <p><b>REVIEW</b> the points given on the slide and provide any additional knowledge or experiences you may have regarding the evidence needed for proof of death.</p> <p><b>ENSURE</b> understanding of the importance of receiving and verifying proof of death to receive survivors' pension and/or DIC benefits.</p>
<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>DISPLAY</b> slide  <b>11.</b> "Types of Proof"</p>  <p><b>REFER</b> to Appendix A for examples of proof of death.</p> <p><b>REVIEW</b> the types of proof listed on the slide and give a brief description of each type and how it each type acts as proof of death.</p> <p><b>NOTE:</b> Depending on the state, a long-form death certificate may be required.</p>

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<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 1</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>	<p><b>DISPLAY</b> slide  <b>12.</b> "Claim 1—Is The Proof of Death of Record?"</p> <p><b>READ</b> the activity instructions on the slide to the trainees.</p> <p align="center"></p> <p><b>REFER</b> trainees to Claim 1 (pmc_vsr_case_2).</p> <p align="center"></p> <p><b>REFER</b> to the CPKM and have trainees locate and review the following sections:</p> <ul style="list-style-type: none"> <li>• 38 CFR 3.211 (Death)</li> <li>• 38 CFR 3.202 (Evidence from Foreign Countries)</li> </ul> <p><b>INSTRUCT</b> trainees to review the information provided in the eCFR sections and use the information to determine the answers for Claim 1.</p>

**Claim 1 Exercise Worksheet: Is The Proof of Death of Record?**

For Claim 1, answer the questions below. Include references to the eCFR and sections of the claim in your explanations.

1. Does the claim contain proof of death?
  
2. Is the proof of death satisfactory?
  
3. Is further development needed?



PowerPoint Slides	Instructor Activities
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<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?<ul style="list-style-type: none"><li>o <i>Yes, the claim includes a death certificate.</i></li><li>o <i>38 CFR 3.211 (Death)</i></li></ul></li><li>2. Is the proof of death satisfactory?<ul style="list-style-type: none"><li>o <i>Death certificate is satisfactory because the cause of death is from cardiac arrest. The spouse is not responsible for the death.</i></li></ul></li></ol> <ul style="list-style-type: none"><li>• Is further development needed?<ul style="list-style-type: none"><li>o <i>No further development is needed.</i></li></ul></li></ul>	<p><b>DISPLAY</b> slide</p> <p><b>13.</b> "Claim 1—Is The Proof of Death of Record?"</p> <p><b>DISCUSS</b> the answers.</p>

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<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>DISPLAY</b> slide  <b>14. "Verifying Proof of Death"</b></p> <p><b>NAVIGATE</b> to the BIRLS VID screen via SHARE</p> <p></p> <p><b>DEMONSTRATE</b> in SHARE comparing the date of death and the SHARE print screen.</p> <p><b>EXPLAIN</b> that if the Veteran's death was a homicide, then there is a need to develop for a police report to ensure that spouse did not commit the murder. If the spouse committed the murder, benefits would be denied unless it was self-defense.</p> <p></p> <p><b>ASK</b> the trainees if they have any questions about verifying proof of death in SHARE or on the BIRLS VID screen.</p>




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<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>	<p><b>DISPLAY</b> slide  <b>15.</b> "Group Activity—Verify Proof of Death"</p> <p><b>READ</b> the activity instructions on the slide to the trainees.</p>  <p><b>REFER</b> trainees to the following example claims:</p> <ul style="list-style-type: none"> <li>• Claim 2 (pmc_vsr_case_7)</li> <li>• Claim 3 (pmc_vsr_excerpt_r)</li> </ul>  <p><b>REFER</b> to the CPKM and have trainees locate and review the following sections:</p> <ul style="list-style-type: none"> <li>• 38 CFR 3.211 (Death)</li> <li>• 38 CFR 3.202 (Evidence from Foreign Countries)</li> </ul> <p><b>INSTRUCT</b> trainees to review the information provided in the eCFR sections and use the information to determine to verify proof of death and if development is needed.</p>


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PowerPoint Slides	Instructor Activities
<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? <ul style="list-style-type: none"> <li>○ <i>No, the proof of death could not be verified because the death certificate was from a foreign country</i></li> <li>○ <i>38 CFR 3.211 (Death)</i></li> <li>○ <i>38 CFR 3.202 (Evidence from Foreign Countries)</i></li> </ul> </li> <li>• Is further development needed to verify the proof of death? <ul style="list-style-type: none"> <li>○ <i>Yes, develop for proof of death because death certificates from foreign countries require specific requirements.</i></li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>16.</b> "Claim 2—Verify Proof of Death"</p> <p><b>DIRECT</b> trainees to the Claim 2 you prepared for this exercise.</p> <p><b>INSTRUCT</b> trainees to review the eCFR sections for proof of death. Based on the information given in the eCFR, request that each group review the claim and answer the questions on the slide.</p> <p><b>DEBRIEF</b> the exercise by discussing the answers to each question for the claim.</p>

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<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? <ul style="list-style-type: none"> <li>○ <i>Yes, the proof of death can be verified by the death certificate</i></li> <li>○ <i>38 CFR 3.211 (Death)</i></li> </ul> </li> <li>• Is further development needed to verify the proof of death? <ul style="list-style-type: none"> <li>○ <i>38 CFR 3.211 (Death)</i></li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>17.</b> "Claim 3—Verify Proof of Death"</p> <p><b>DIRECT</b> trainees to the Claim 3 you prepared for this exercise.</p> <p><b>INSTRUCT</b> trainees to review the eCFR sections for proof of death. Based on the information given in the eCFR, request that each group review the claim and answer the questions on the slide.</p> <p><b>DEBRIEF</b> the exercise by discussing the answers to each question for the claim.</p>
<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>DISPLAY</b> slide  <b>18.</b> "Proof of Death Review"</p>  <p><b>REFER</b> to the CPKM eCFR references on:</p> <ul style="list-style-type: none"> <li>• Death</li> <li>• Evidence from Foreign Countries</li> </ul> <p><b>REVIEW</b> each point on the slide and remind the trainees where the information can be found using the eCFR references. If needed, demonstrate the process for verifying proof of death in SHARE.</p>
<p><b>Questions?</b></p> 	<p><b>DISPLAY</b> slide  <b>19.</b> "Questions?"</p>  <p><b>ASK</b> trainees if there are any concepts that are unclear or may need further review.</p>

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<b>PowerPoint Slides</b>	<b>Instructor Activities</b>
<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>	<p><b>DISPLAY</b> slide 20. "What's Next"</p> <p><b>DISCUSS</b> the upcoming lesson with trainees.</p> <p></p> <p><b>EMPHASIZE</b> that they review all previous lessons, handouts, and references if needed.</p>