



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

Lesson Plan

July 11, 2017

Version 1.0

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

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 PMC VSRs 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, trainees 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)

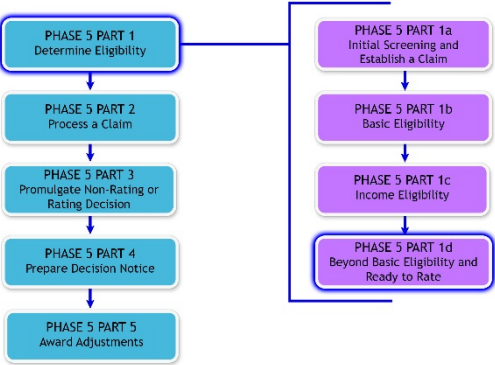


**Lesson 26: Determine Eligibility for Month of Death Benefit
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Topic	Description
Lesson Objectives:	<p>Determine whether the surviving spouse is eligible for MOD benefits.</p> <ul style="list-style-type: none"> • Determine whether Veteran was receiving 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"> • Lesson plan • Master Course Map learning aid • Slides • Projector • Pen and paper or access to a whiteboard • 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 • Claim 1 (pmc_vsr_excerpt_v) used for demonstration showing: <ul style="list-style-type: none"> ○ Veteran was receiving pension at time of death ○ MOD payment has not yet been made to spouse • Claim 2 (pmc_vsr_excerpt_w) an eligible MOD claim application, including evidence, to use for practice in determining eligibility for MOD benefit. • Answers to the questions for the Claim 2. See page 16 of this lesson plan for where to place the answers.

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Instructor Notes

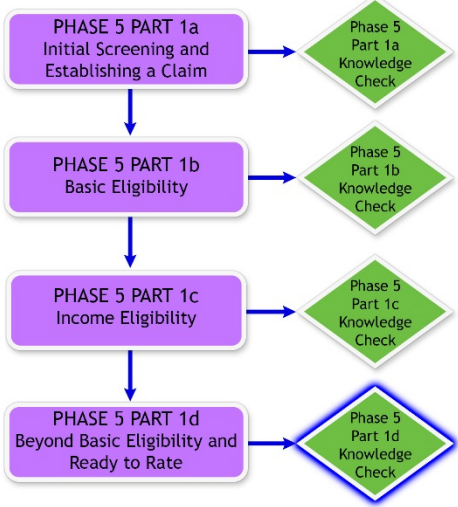

This lesson provides trainees with references, resources, and examples to determine a surviving spouse's eligibility for MOD benefit.

PowerPoint Slides	Instructor Activities
<p>Lesson 26: Determine Eligibility for Month of Death Benefit</p>	<p>DISPLAY slide</p> <p>1. "Lesson 26: Determine Eligibility for Month of Death Benefit"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<p>You Are Here</p> 	<p>DISPLAY slide</p> <p>2. "You Are Here"</p>  <p>REFER trainees to the Master Course Map learning aid in the Trainee Guide.</p> <p>DESCRIBE the diagram.</p> <p>EXPLAIN where the trainees are in the phase, what they have completed, and where they are headed next.</p> <p>INFORM 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 because they occur less frequently and/or are more complex.</p>  <p>EMPHASIZE 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>


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PowerPoint Slides	Instructor Activities
<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>DISPLAY slide</p> <p>3. "Beyond Basic Eligibility and Ready to Rate"</p> <p>REMIND trainees of the basic eligibility process.</p> <p>EXPLAIN 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>INFORM trainees that this lesson will focus on determining a surviving spouse's eligibility for MOD benefit by reviewing the Veteran's pension status at time of death, reviewing SHARE for MOD payment information, and determining whether the Veteran was married to the claimant at time of death.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and eligibility (PMC VSR) • Processing Claims (PMC VSR) 	<p>DISPLAY slide</p> <p>4. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>



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PowerPoint Slides	Instructor Activities
<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>DISPLAY slide</p> <p>5. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>
<p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B{Phase 5 Part 1a Knowledge Check} A --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} C --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} E --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} style H stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide</p> <p>6. "Knowledge Check"</p> <p>EXPLAIN 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>REFER to the Master Course Map 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>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>DISPLAY slide</p> <p>7. "Why Determining Eligibility for MOD Benefit Is Important"</p> <p>EXPLAIN that upon the death of the Veteran, the surviving spouse may be eligible for MOD benefit.</p> <p></p> <p>EMPHASIZE that the Veteran must have been receiving pension or compensation benefits at the time of death for the surviving spouse to receive MOD benefit. Development may be required to gather the evidence needed.</p>

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PowerPoint Slides	Instructor Activities
<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. 	<p>DISPLAY slide</p> <p>8. "What Is MOD Benefit?"</p>  <p>REFER to the following eCFR reference concerning MOD benefit:</p> <ul style="list-style-type: none"> • 38 CFR 3.20 (Surviving spouse's benefit for month of veteran's death) <p>EXPLAIN that when a Veteran passes away, his or her benefits are terminated the first of the month of death. The payment amount represents the disability (compensation) or pension payment amount that the Veteran was entitled to the month that he or she passed away.</p>  <p>EMPHASIZE that only the surviving spouse can be eligible to receive the MOD benefits and cannot be paid as an accrued benefit. However, MOD may be granted along with an accrued benefit.</p>

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PowerPoint Slides	Instructor Activities
<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>DISPLAY slide 9. "Requirements for MOD Benefit"</p> <p>TRANSITION to requirements for MOD benefit.</p>  <p>REFER to the CPKM and have them navigate to the reference 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(c)</p> <p>ALLOW 3–5 minutes to review the sections.</p> <p>EXPLAIN that if the Veteran receiving compensation or pension died on or after Jan. 1 1997, the MOD payment will be made to the surviving spouse regardless of survivors' pension or DIC rate.</p>  <p>EMPHASIZE that a formal MOD claim is not required but development may be required to establish the claimant's relationship to the deceased Veteran.</p> <p>REMIND them that they learned how to establish a relationship for a spouse in Phase 5, Part 1, Lesson 12: Determine Dependency Eligibility: Spouse.</p>
<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 	<p>DISPLAY slide 10. "Verify Whether Veteran Was Receiving Pension or Compensation at Time of Death"</p> <p>TRANSITION to verifying whether the Veteran was receiving pension at time of death.</p> 


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PowerPoint Slides	Instructor Activities
<p>compensation benefits at time of death</p> <ul style="list-style-type: none"> • Can also be verified through payment history, if needed 	<p>REFER trainees to Claim 1 (pmc_vsr_excerpt_v)</p> <p></p> <p>INSTRUCT trainees to follow along as you demonstrate how to:</p> <ul style="list-style-type: none"> • Navigate to the Awards screen • Select the payee number • Review award information <p>EXPLAIN that selecting the payee number of the deceased will show if the Veteran was entitled to or receiving benefits up until his or her death.</p> <p></p> <p>EMPHASIZE that while this information can also be verified in the payment history, the information may not be as accurate because benefits being paid would not be shown if there was a withholding present.</p> <p>REMIND them that they learned about how to determine if there are withholdings in a previous lesson, Phase 5, Part 1, Lesson 24: Determine Accrued Benefits Eligibility.</p> <p></p> <p>ALLOW for questions throughout the process and provide any tips you may have learned while working an MOD claim.</p>



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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>DISPLAY slide 11. "Determine Whether MOD Payment Has Been Made"</p> <p>TRANSITION to determining whether an MOD payment has been made.</p>  <p>REFER trainees to Claim 1 (pmc_vsr_excerpt_v).</p>  <p>DEMONSTRATE in SHARE using Claim 1 with a spouse payee code that shows the one-month payment equal to the Veteran's rate.</p> <p>EXPLAIN the following EP codes when referring to MOD:</p> <ul style="list-style-type: none"> EP 297: Indicates the surviving spouse applied for MOD as a stand-alone benefit EP 147 or 197: Claim is an original surviving spouse claim. MOD will need to be processed with the original claim. <p>REMIND trainees that they learned about EP codes in Phase 5, Part 1, Lesson 6: End Product (EP) Codes.</p>
<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 	<p>DISPLAY slide 12. "Veteran Married to Claimant at Time of Death"</p> <p>TRANSITION to determining whether the Veteran was married to the claimant at the time of death.</p> 




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	<p>REFER to the CPKM and have them navigate to the M21-1 IV.iii.3.A.5 (Determining the Surviving Spouse's Entitlement to Benefits for the Month of Death) reference for the information needed to establish a relationship to the Veteran for MOD entitlement.</p> <p>EXPLAIN that the surviving spouse must meet eligibility requirements:</p> <ul style="list-style-type: none">• If the spouse is on the Veteran's award, the spouse is eligible to receive MOD benefit.• If the spouse is not on the Veteran's award, develop to establish the relationship. <p>REMINd them that they learned how to establish a relationship for a spouse in Phase 5, Part 1, Lesson 12: Determine Dependency Eligibility: Spouse.</p> <p style="text-align: center;"></p> <p>EMPHASIZE that establishing relationship for MOD is more lenient than for DIC or survivors' pension. All that is needed is the surviving spouse's:</p> <ul style="list-style-type: none">• Name• Date of birth (DOB)• Social security number (SSN)• Address <p>NOTE: The Department of Veterans Affairs (VA) may pay additional disability compensation to a Veteran for his/her dependent(s) if the Veteran has a combined disability rating of at least 30 percent.</p>

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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>	<p>DISPLAY slide 13. "Scenario—Is the Surviving Spouse Eligible for MOD Benefit?"</p>  <p>REFER to the Accrued Benefits job aid and CPKM and have them navigate to the following M21-1 and eCFR references:</p> <ul style="list-style-type: none"> • 38 CFR 3.20 (Surviving spouse's benefit for month of veteran's death) • M21-1 IV.iii.3.A.5 (Determining the Surviving Spouse's Entitlement to Benefits for the Month Of Death [MOD]) <p>READ the scenario with trainees.</p>  <p>ASK the trainees to raise their hands when they have the answer. Select the first trainee to raise his or her hand.</p> <p>NOTE the answers are on the next slide.</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> <ul style="list-style-type: none"> • <i>Yes. You would grant Mrs. Tanglewood one month of \$917.13 effective July 1, 2015, under an EP 297 (PMC—MOD Check Request).</i> 	<p>DISPLAY slide</p> <p>14. "Scenario—Is the Surviving Spouse Eligible for MOD Benefit? Answer"</p> <p>REVIEW the question in the scenario with trainees.</p> <p>PROVIDE any clarification or explanation needed based on the answer given by the trainee selected.</p> <p style="text-align: center;"></p> <p>ASK the trainees if they have any questions about the scenario and why you may grant the surviving spouse the 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. 	<p>DISPLAY slide</p> <p>15. "Claim 2 Activity—Determine If Spouse Is Eligible for MOD Benefit"</p> <p>READ the activity instructions on the slide to the trainees.</p> <p style="text-align: center;"></p> <p>REFER trainees to Claim 2 (pmc_vsr_excerpt_w).</p> <p style="text-align: center;"></p> <p>REFER to the CPKM and have trainees locate and review the following CFR and manual sections:</p> <ul style="list-style-type: none"> • 38 CFR 3.20 (Surviving spouse's benefit for month of veteran's death) • M21-1 IV.iii.3.A.5 (Determining the Surviving Spouse's Entitlement to Benefits for the Month Of Death [MOD])

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PowerPoint Slides	Instructor Activities
	INSTRUCT trainees to review the information provided in the eCFR and manual sections and use the information to determine if the claimant is eligible to receive MOD benefit.

Claim 2 Activity Worksheet: Determine If Spouse Is Eligible for MOD Benefit

For the Claim 2, 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?

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<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? <ul style="list-style-type: none"> ○ <i>Yes, the Veteran was receiving a monthly benefit of \$2,120.</i> • Had an MOD payment been made? <ul style="list-style-type: none"> ○ <i>No, the payment has not been made. You can verify payment by reviewing the Corporate Record under the effective date column.</i> • Is the claimant an eligible surviving spouse? <ul style="list-style-type: none"> ○ <i>Yes, the claimant is an eligible surviving spouse.</i> • Is development necessary? <ul style="list-style-type: none"> ○ <i>No, development is not needed.</i> 	<p>DISPLAY slides</p> <p>16. "Claim 2 Activity—Determine If Spouse Is Eligible for MOD Benefit Debrief"</p> <p>DEBRIEF the exercise by discussing the answers to each question for Claim 2 using the answers you prepared ahead of time.</p>

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PowerPoint Slides	Instructor Activities
<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>DISPLAY slide 17. "Determine Eligibility for MOD Benefit Review"</p>  <p>REFER to the CPKM eCFR and manual references on MOD claims.</p> <p>REVIEW each point on the slide and remind the trainees where the information can be found using the eCFR and manual references. If needed, review the systems and applications used to determine eligibility for the MOD benefit.</p>
<p>Questions?</p> 	<p>DISPLAY slide 18. "Questions?"</p>  <p>ASK if there are any concepts that are unclear or may need further review.</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 	<p>DISPLAY slide 19. "What's Next"</p> <p>DISCUSS the upcoming lesson with trainees.</p>  <p>EMPHASIZE that they should review all previous lessons, handouts, and references if needed.</p>