



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 5: Award Adjustments

Lesson 4: Determine Dependency Adjustments

Lesson Plan

April 12, 2017

Version 1.0

Lesson 4: Determine Dependency Adjustments
Lesson Plan

Determine Dependency Adjustments

Lesson Overview

Topic	Description
Time Estimate:	1 hour
Purpose of the Lesson:	This lesson is part of the entry-level course for PMC VSRs. The purpose of this lesson is to prepare PMC VSRs for determining changes in dependency and for the impact those changes have on a running award.
Prerequisite Training Requirements:	Prior to taking the Determine Dependency Adjustments lesson, trainees must complete the entry level course Phases 1–4, and Phase 5, Parts 1-4, and Phase 5 part 5 lessons 1-3. (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.ii.2.B.1.b (Requirements for a Complete Claim Received on or After March 24, 2015) • M21-1 III.iii.5 (Relationship and Dependency) <ul style="list-style-type: none"> ○ M21-1 III.iii.5.A.4.a (Forms Claimants Must Use to Initiate the Process of Adding a Dependent to Their Award) ○ M21-1 III.iii.5.C.2.b (How to Develop for Common Law Marriage) ○ M21-1 III.iii.5.C.3.a (Recognition of Common Law Marriages by State) ○ M21-1 III.iii.5.D.1 (Tribal, Proxy, and Transgender Marriages) ○ M21-1 III.iii.5.G (Establishing a Biological Child, Adopted Child, or Stepchild as a Veteran's Child for Department of Veterans Affairs (VA) Purposes) ○ M21-1 III.iii.5.G.6 (Establishing a Stepchild as a Veteran's Child for VA Purposes)

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Topic	Description
	<ul style="list-style-type: none"> • M21-1 III.iii.6 (School Attendance) • M21-1 IV.iii.1.A.2.a (Definition: DIC) • M21-1 V.i.3.A.2.a (Income Development for Original and Reopened Claims) • M21-1 V.iii.1.F (Dependents for Current- Law Pension Purposes) <ul style="list-style-type: none"> ○ M21-1 V.iii.1.F.2.a (General Information on Counting the Income of Dependents) ○ M21-1 V.iii.1.F.2.k (Failure to Resolve the Income of Dependents) • 38 CFR 3.57(a)(1) (Child: General) • 38 CFR 3.204 (Evidence of dependents and age) • 38 CFR 3.205 (Marriage) • 38 CFR 3.206 (Divorce) • 38 CFR 3.207 (Void or annulled marriage) • 38 CFR 3.208 (Claims based on attained age) • 38 CFR 3.209 (Birth) • 38 CFR 3.210 (Child's relationship) • 38 CFR 3.211 (Death) • Annotate the Award Checklist job aid • Dependency Eligibility Requirements job aid • Dependency Eligibility: Spouse job aid • Develop for Missing Information/Evidence job aid • Income and Net Worth Status job aid • Initial Year job aid • Processing an Award Adjustment job aid • Time Limits job aid
Knowledge Check:	Phase 5: Stages of a Claim, Part 5a: Award Adjustments

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Topic	Description
Technical Competencies:	<ul style="list-style-type: none">• Program Benefits and Eligibility (PMC VSR)• Processing Claims (PMC VSR)• Income Counting and Net Worth• VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none">• Determine award adjustment based on change in dependency.<ul style="list-style-type: none">○ Determine changes in dependency.○ Determine actions to take based on dependency changes.○ Determine the award adjustment based on change in dependency.
What You Need:	<ul style="list-style-type: none">• Lesson plan• Master Course Map learning aid• Slides• Projector• Access to VBA intranet• Pen and paper or access to a whiteboard• Additional instructors to achieve a 1:4 instructor/trainee ratio during the Guided Practice portion of the lesson• Access to the following VBA systems in academy mode:<ul style="list-style-type: none">○ VBMS○ SHARE○ PCGL○ VVA• Access to the following job aids from VSR Assistant:<ul style="list-style-type: none">○ Annotate the Award Checklist job aid○ Dependency Eligibility Requirements job aid○ Dependency Eligibility: Spouse job aid○ Develop for Missing Information/Evidence job aid

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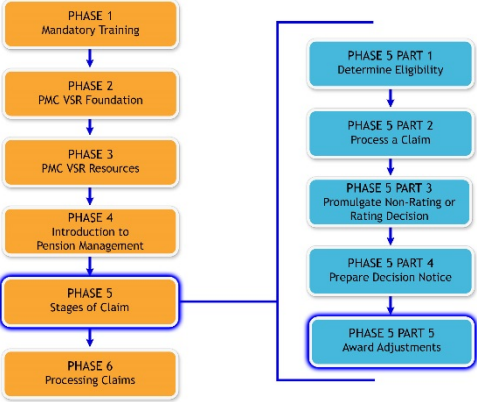

Topic	Description
	<ul style="list-style-type: none">○ Income and Net Worth Status job aid○ Initial Year job aid○ Processing an Award Adjustment job aid○ Time Limits job aid● Claim 1 (pmc_vsr_case_1) in academy mode to demonstrate adding/removing a dependent, adjusting the award, and generating the new award● Claim 2 (pmc_vsr_excerpt_m) in academy mode for trainees to use for determining an award adjustment and generating the new award

Instructor Notes

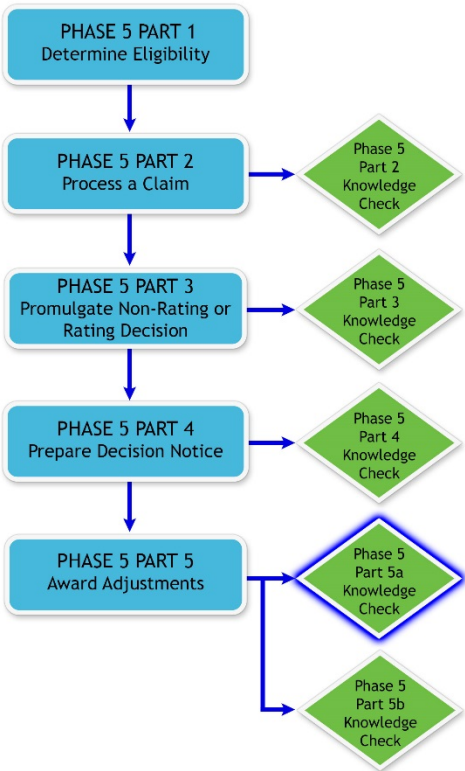

This lesson provides trainees with references, resources, and examples to determine changes in dependency and the impact those changes have on a running award.

PowerPoint Slides	Instructor Activities
Lesson 4: Determine Dependency Adjustments	DISPLAY slide 1. "Lesson 4: Determine Dependency Adjustments" INTRODUCE yourself as the instructor. INTRODUCE the lesson.

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PowerPoint Slides	Instructor Activities
<p>You Are Here</p> 	<p>DISPLAY slide 2. "You Are Here"</p>  <p>REFER trainees to the Master Course Map learning aid in the Trainee Guide.</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 5: Award Adjustments contains seven lessons. The fourth lesson focuses on determining the award adjustment based on a change in dependency.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • Income Counting and Net Worth • VBA Applications (PMC VSR) 	<p>DISPLAY slide 3. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>
<p>Lesson Objectives</p> <p>Determine award adjustment based on change in dependency.</p> <ul style="list-style-type: none"> • Determine changes in dependency. • Determine actions to take based on dependency changes. • Determine the award adjustment based on change in dependency. 	<p>DISPLAY slide 4. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>

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PowerPoint Slides	Instructor Activities
<p>Knowledge Check</p>  <pre> graph TD 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] P2 --> KC2{Phase 5 Part 2 Knowledge Check} P3 --> KC3{Phase 5 Part 3 Knowledge Check} P4 --> KC4{Phase 5 Part 4 Knowledge Check} P5 --> KC5a{Phase 5 Part 5a Knowledge Check} P5 --> KC5b{Phase 5 Part 5b Knowledge Check} style KC5a stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide 5. "Knowledge Check"</p> <p>EXPLAIN that a knowledge check will be given at the end of Phase 5, Part 5a that covers all material learned in this lesson.</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 It Matters!</p> <ul style="list-style-type: none"> • Used to determine who can be considered a dependent • Used to determine allowance based on dependents <ul style="list-style-type: none"> ○ Can affect Veteran's award and payment amount ○ May require development 	<p>DISPLAY slide 6. "Why It Matters!"</p> <p>REMIND trainees that they learned the definition of dependency in previous lessons.</p>  <p>REFER to M21-1 III.iii.5 (Relationship and Dependency) for a review of relationship and dependency as well as the Dependency Eligibility Requirements job aid.</p> <p>SHARE a story from your own experience of a claim for a change in dependency that required development.</p>  <p>EMPHASIZE that changes in dependency can affect the award amount for the Veteran or surviving spouse and development or due process may be required if the claim does not contain the required information to establish dependency or if clarification is needed to determine income, expenses, or net worth.</p>
<p>Job Aids for Determining Changes in Dependency</p> <ul style="list-style-type: none"> • Processing an Award Adjustment job aid • Annotate the Award Checklist job aid • Initial Year job aid • Income and Net Worth Status job aid • Time Limits job aid 	<p>DISPLAY slide 7. "Job Aids for Determining Changes in Dependency"</p>  <p>REFER to the job aids listed on the slide. Have the trainees access each job aid.</p> <p>REMIND trainees that they have used the job aids in previous lessons and that each job has information regarding processing a claim for a change in dependency.</p>



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<ul style="list-style-type: none"> • Dependency Eligibility Requirements job aid • Dependency Eligibility: Spouse job aid • Develop for Missing Information/Evidence job aid 	<p>PROVIDE a brief review of the information found in each job aid.</p>
<p>Lesson Overview</p> <ul style="list-style-type: none"> • Demonstration—Instructor completes an award adjustment based on dependency changes with opportunities for questions. • Guided Practice—Trainees complete an addition/removal of a dependent and award adjustment with questions and feedback/remediation. 	<p>DISPLAY slide 8. "Lesson Overview"</p> <p>EXPLAIN that the purpose of Demonstration strategy is to provide trainees with the opportunity to see the flow of the process, as they would do it in the field. Trainees will have opportunities to ask questions for clarification.</p> <p>EXPLAIN that the purpose of the Guided Practice strategy is to allow trainees to perform the steps using a job aid. They may ask questions about the process to increase their understanding. Feedback and remediation is provided as they proceed through the process.</p>
<p>Changes in Dependency</p> <ul style="list-style-type: none"> • Review dependency documents in VBMS when claim is received • May be submitted by claimant, fiduciary, or third party <ul style="list-style-type: none"> ○ If submitted by a third party, you will need to complete due process before taking any action on the claim. 	<p>DISPLAY slide 9. "Changes in Dependency"</p> <p>EXPLAIN that all information pertaining to the claim can be found in VBMS.</p> <p>REMIND trainees that due process is required when information pertaining to a claim is submitted by a third party.</p> <div style="text-align: center;">  </div> <p>EMPHASIZE that if information for a claim was received by a third party, no action can be taken on the claim until due process is completed.</p>


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PowerPoint Slides	Instructor Activities
<p>Verify Addition/Removal of Dependent</p> <ul style="list-style-type: none">• Verify if dependent being added/removed is:<ul style="list-style-type: none">○ Spouse○ Child• Verify the reason for addition/removal• Develop or conduct due process for more information if needed• If claim contains all information needed, continue with addition/removal of dependent	<p>DISPLAY slide 10. "Verify Addition/Removal of Dependent"</p>  <p>REFER to the following job aids and references:</p> <ul style="list-style-type: none">• Dependency Eligibility Requirements• Dependency Eligibility: Spouse• M21-1 V.iii.1.F (Dependents for Current- Law Pension Purposes)• M21-1 III.iii.5.C.3.a (Recognition of Common Law Marriages by State)• M21-1 III.iii.5.D.1 (Tribal, Proxy, and Transgender Marriages)• M21-1 III.iii.5.C.2.b (How to Develop for Common Law Marriage)• M21-1 III.iii.5.G.6 (Establishing a Stepchild as a Veteran's Child for VA Purposes) <p>NOTE: References can also be found in the job aids listed.</p> <p>EXPLAIN that the information in the claim must provide the reason, as well as evidence, for addition/removal of the dependent.</p> <p>REMINDE trainees that when adding a dependent, the dependent must be added in SHARE prior to adding the dependent in VBMS-A.</p>  <p>EMPHASIZE that if the claim is missing identifying information such as SSN, address, etc., develop for the information. If the claim is missing financial information such as net worth,</p>



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PowerPoint Slides	Instructor Activities
	<p>conduct due process.</p> <p>NOTE: Acceptable reasons for removal of a dependent can be found on the next slide.</p>
<p>Acceptable Reasons for Removing a Dependent</p> <ul style="list-style-type: none"> • Death of spouse, child, or dependent parent • Marriage of child • Child adopted out of the family • Divorce or annulment from spouse • Separation (estrangement) from spouse with no financial contributions • Child turns 18 and is not in school • Child ages 18-23 terminates school attendance • Child over 18 and in school turns 23 years old prior to school attendance termination • Child born 	<p>DISPLAY slide</p> <p>11. "Acceptable Reasons for Removing a Dependent"</p> <p>EXPLAIN that the following are the acceptable reasons for removing a dependent:</p> <ul style="list-style-type: none"> • Death of spouse, child, or dependent parent • Marriage of child • Child adopted out of the family • Divorce or annulment from spouse • Separation (estrangement) from spouse with no financial contributions • Child turns 18 and is not in school • Child ages 18-23 terminates school attendance • Child over 18 and in school turns 23 years old prior to school attendance termination • Child born <div style="text-align: center;">  </div> <p>EMPHASIZE that a dependent spouse cannot be removed simply because they do not live with the Veteran. Financial contributions must cease and a valid reason for the separation must be present (such as irreconcilable differences, abuse, etc.) If the separation from the spouse is solely due to medical reasons, the adjustment cannot be made.</p>


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<p>Will Addition/Removal of Dependent Result in Increase of Benefits?</p> <ul style="list-style-type: none">• If addition or removal of dependent results in an increase of benefits, the claim must be submitted on the prescribed form.<ul style="list-style-type: none">◦ M21-1 III.iii.5.A.4.a (Forms Claimants Must Use to Initiate the Process of Adding a Dependent to Their Award)• If not submitted on prescribed form, develop for income/net worth as income could result in award reduction.	<p>DISPLAY slide</p> <p>12. "Will Addition/Removal of Dependent Result in Increase of Benefits?"</p>  <p>REFER to the following references:</p> <ul style="list-style-type: none">• M21-1 III.iii.5.A.4.a (Forms Claimants Must Use to Initiate the Process of Adding a Dependent to Their Award)• M21-1 III.ii.2.B.1.b (Requirements for a Complete Claim Received on or After March 24, 2015)• M21-1 V.iii.1.F.2.k (Failure to Resolve the Income of Dependents) <p>Have trainees navigate to the reference and give a couple minutes to review.</p> <p>EXPLAIN that if the request contains all information needed to add/remove a dependent and may result in an increase in benefits, the claim must be submitted using VA Form VA Form 21-686c, Declaration of Status of Dependents, or any of the forms listed in the last row of the table show in M21-1 III.ii.2.B.1.b (Requirements for a Complete Claim Received on or after March 24, 2015). DIC claims are the exception.</p>  <p>EMPHASIZE that if the request to add a dependent is not submitted on prescribed form, you will still need to conduct due process for income and net worth, notably information for the dependents.</p>



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<p>Scenario—Can You Add the Dependent?</p> <p>Veteran James Van Winkle has a running pension award since August 1, 2011. He submitted VA Form 21-686c, Declaration of Status of Dependents, on June 13, 2016. On the form, he reports that he got married on March 15, 2016, to Sandra Johnson. He filled out the form with his complete marital history and Sandra's complete marital history, indicated that Sandra is not a Veteran, and provided her SSN and date of birth. Along with this form, he submitted VA Form 21-4138, Statement in Support of Claim, stating "My new wife has no income or net worth to report."</p> <p>Based on the information provided, are you able to add the dependent?</p>	<p>DISPLAY slide 13. "Scenario—Can You Add the Dependent?"</p> <p>PRESENT the scenario.</p>  <p>REFER to the Dependency Eligibility: Spouse job aid to use as a reference while reviewing the scenario.</p>




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<p>Scenario—Can You Add the Dependent? Answer</p> <p>Veteran James Van Winkle has a running pension award since August 1, 2011. He submitted VA Form 21-686c, Declaration of Status of Dependents, on June 13, 2016. On the form, he reports that he got married on March 15, 2016, to Sandra Johnson. He filled out the form with his complete marital history and Sandra's complete marital history, indicated that Sandra is not a Veteran, and provided her SSN and date of birth. Along with this form, he submitted VA Form 21-4138, Statement in Support of Claim, stating "My new wife has no income or net worth to report."</p> <p>Based on the information provided, are you able to add the dependent?</p> <p><i>Yes, the claim confirms that all information is present. Process the award adjustment to add the dependent spouse beginning April 1, 2016.</i></p>	<p>DISPLAY slide</p> <p>14. "Scenario—Can You Add the Dependent? Answer"</p> <p>DISCUSS the answer to the scenario:</p> <ul style="list-style-type: none">• <i>Yes, the claim confirms that all information is present. Process the award adjustment to add the dependent spouse beginning April 1, 2016.</i> <p></p> <p>ASK if any clarification is needed regarding whether the dependent can be added.</p>
<p>Guided Practice—Add/Remove Dependent Based on Information Provided</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Access the Claim 1	<p>DISPLAY slide</p> <p>15. "Guided Practice—Add/Remove Dependent Based on Information Provided"</p> <p></p>




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<p>provided in VBMS</p> <ul style="list-style-type: none"> ○ Access the following job aids: <ul style="list-style-type: none"> ▪ Processing an Award Adjustment ▪ Dependency Eligibility: Spouse ▪ Dependency Eligibility Requirements ○ Along with the instructor: <ul style="list-style-type: none"> ▪ Determine if all the information to add/remove the dependent is present ▪ Add/Remove the dependent <ul style="list-style-type: none"> • Time allowed: 10 min. 	<p>REFER to the following job aids:</p> <ul style="list-style-type: none"> • Processing an Award Adjustment • Dependency Eligibility Requirements • Dependency Eligibility: Spouse  <p>SHOW the sample claim requesting a dependency change.</p> <p>INSTRUCT the trainees to open Claim 1 and the job aids listed on the slide. Have them complete the actions for determining to add/remove a dependent and adding/removing a dependent as you complete them, using the job aids listed.</p> <p>EXPLAIN your actions as you complete them in the sample claim.</p> <p>NOTE: Stop after you have added/removed the dependent. You will demonstrate the steps for the award adjustment in the next section.</p>  <p>ASK if any clarification is needed regarding adding/removing a dependent.</p>
<p>Demonstration—Determine Award Adjustment Based on Change in Dependency</p> <ul style="list-style-type: none"> • Ensure: <ul style="list-style-type: none"> ○ All evidence has been received ○ Income and net worth has been received • Enter information into VBMS-A 	<p>DISPLAY slides</p> <p>16. “Demonstration—Determine Award Adjustment Based on Change in Dependency”</p>  <p>REFER to the following job aids:</p> <ul style="list-style-type: none"> • Processing an Award Adjustment • Annotate the Award Checklist • Initial Year

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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> • Generate the award 	<ul style="list-style-type: none"> • Income and Net Worth Status • Time Limits <p>EXPLAIN that if all information has been received within the given time limit, the claim can be processed.</p> <div style="text-align: center;"></div> <p>DEMONSTRATE, using the job aids and Claim from previous slide, what information must be entered in VBMS-A and generate the award.</p> <div style="text-align: center;"></div> <p>EMPHASIZE that a new award will need to be generated once all the information has been entered.</p>
<p>Guided Practice—Determine Award Adjustment and Generate Award</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Access the following job aids: <ul style="list-style-type: none"> ▪ Processing an Award Adjustment ▪ Dependency Eligibility Requirements ▪ Dependency Eligibility: Spouse ▪ Annotate the Award 	<p>DISPLAY slides</p> <p>17. “Guided Practice—Determine Award Adjustment and Generate Award”</p> <p>PROVIDE Claim 2 to trainees via VBMS.</p> <p>READ the activity instructions on the slide to the trainees.</p> <div style="text-align: center;"></div> <p>REFER to the job aids listed on the slide.</p> <p>INSTRUCT trainees to use the job aids as needed when reviewing the Claim 2 information and making determinations regarding dependency.</p>

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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none">▪ Checklist<ul style="list-style-type: none">▪ Initial Year▪ Income and Net Worth Status▪ Time Limits▪ Develop for Missing Information/Evidence○ Review Claim 2 in VBMS.○ Determine the award adjustment in VBMS-A.○ Generate the award.○ Be prepared to answer questions about whether to add/remove a dependent and how you determined the award adjustment. <p>• Time allowed: 10 min</p>	


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PowerPoint Slides	Instructor Activities
<p>Guided Practice—Determine Award Adjustment and Generate Award Debrief</p> <ul style="list-style-type: none"> • Follow along as the instructor confirms: <ul style="list-style-type: none"> ○ The type of dependent ○ If the correct information was provided ○ Whether to add or remove the dependent ○ The correct way to add or remove the dependent ○ The information used to complete the SHARE and VBMS-A screens ○ The correct award adjustment ○ The new updated award • Ask for clarification on how the award adjustment was determined, if needed. 	<p>DISPLAY slides</p> <p>18. “Guided Practice—Determine Award Adjustment and Generate Award Debrief”</p> <p>DEBRIEF the exercise by going through the sample claim and providing:</p> <ul style="list-style-type: none"> • The type of dependent • If the correct information was provided • Whether to add or remove the dependent • The correct way to add or remove the dependent • The information used to complete the SHARE and VBMS-A screens • The correct award adjustment • The new updated award
<p>Determine Dependency Adjustments Review</p> <ul style="list-style-type: none"> • Determine award adjustment based on change in dependency. <ul style="list-style-type: none"> ○ Determine changes in dependency. <ul style="list-style-type: none"> ▪ May be submitted by claimant, 	<p>DISPLAY slide</p> <p>19. “Determine Dependency Adjustments Review”</p> <div style="text-align: center;">  </div> <p>REVIEW the job aids used in this lesson (listed on slide 7):</p> <ul style="list-style-type: none"> • Processing an Award Adjustment job aid • Annotate the Award Checklist job aid

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<p>fiduciary, or third party</p> <ul style="list-style-type: none"> ▪ Verify if dependent is child or spouse ▪ Verify reason for addition/removal ▪ May need to develop <ul style="list-style-type: none"> ○ Determine actions to take based on dependency changes. <ul style="list-style-type: none"> ▪ Add/remove dependent ▪ May result in increase in benefits ○ Determine the award adjustment based on change in dependency. <ul style="list-style-type: none"> ▪ Enter information in SHARE and VBMS-A ▪ Generate new award 	<ul style="list-style-type: none"> • Initial Year job aid • Income and Net Worth Status job aid • Time Limits job aid • Dependency Eligibility Requirements job aid • Dependency Eligibility: Spouse job aid • Develop for Missing Information/Evidence job aid <p>REVIEW the acceptable reasons for removal of a dependent (listed on slide 11).</p> <ul style="list-style-type: none"> • Death of spouse, child, or dependent parent • Marriage of child • Child adopted out of the family • Divorce or annulment from spouse • Separation (estrangement) from spouse with no financial contributions • Child turns 18 and is not in school • Child ages 18-23 terminates school attendance • Child over 18 and in school turns 23 years old prior to school attendance termination • Child born <div style="text-align: center;">  </div> <p>EMPHASIZE that development and/or due process may be necessary, (e.g., income and net worth, marital information).</p> <p>REMIND trainees that the job aids contain the information needed to add/remove a dependent and process an award adjustment.</p>

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PowerPoint Slides	Instructor Activities
<p>Questions?</p> 	<p>DISPLAY slide 20. "Questions?"</p>  <p>ASK if there are any concepts that are unclear or that may need further review.</p>
<p>What's Next?</p> <ul style="list-style-type: none"> • Phase 5: Stages of a Claim, Part 5a: Award Adjustments Knowledge Check Preparation • Review all references and job aids provided in this lesson 	<p>DISPLAY slide 21. "What's Next?"</p> <p>INTRODUCE the upcoming knowledge check preparation lesson with trainees.</p>  <p>EMPHASIZE that they should review all job aids and references associated with this lesson.</p>