

UPTAKE LIST

VETERAN'S PENSION CLAIM

(MUST BE PERMANENTLY & TOTALLY DISABLED TO WORK OR OVER SIXTY-FIVE)

Date _____

Check AS400 to see if any information on file.

If nothing in AS400, add and scan any information that is brought in. If claim to be filed, give number from notebook and add to AS400. If DD214 brought in, scan and add note to first page (Scanned DD214 in file), and file DD214 in Scanned Living file cabinet. If there is no DD214, have to order before claim can be filed. Was veteran's home of record upon discharge Anderson County? If so, check the discharge book since one may be on file.

Eligibility for Veterans Pension:

Veterans with low incomes who are either permanently and totally disabled to work, or age 65 and older, may be eligible for monetary support if they have 90 days or more of active duty military service (not active duty for training); at least one day of which was during a period of war. The 90-day active service requirement does not apply to veterans with a service-connected disability justifying discharge from the military. Veterans who enlisted after September 7, 1980 must have served 24 continuous months or the full period for which they were called to active duty in order to be eligible.

If relative inquiring about benefits, ask if they have POA with them. If not, they will need to bring back.

All forms must be signed by veteran. If the VA determines that the veteran is incompetent, a fiduciary (payee) will be assigned at that time to manage VA funds for the veteran; however, until VA makes a determination of incompetency no one is able to sign for the veteran.

Discuss why it is important that any and all income be reported to the VA, even though they may think that an amount would not count because it is too small. All income is countable for VA purposes and if any unreported income is discovered, it will create an overpayment and the money will have to be repaid to the VA, can even be garnished from Social Security benefits. Get Disclaimer (SCDVA 3) signed.

ASSETS: Veteran and spouse's assets together cannot be over \$80,000.00. The VA does not count the home lived in, a reasonable amount of land, and vehicles.

FORMS:

21-527EZ
21-2680
21-0779(if in a nursing home)
21-4138 (for future use)
21-22

FAX THE FOLLOWING:

21-527EZ
21-2680/21-0779(instructions next page)
Medical Information(if applicable)
21-22
DD214
215-842-4410 (PENSION MANAGEMENT)

*Please note that any income is countable for VA purposes. Any unreported income will result in an overpayment. VA has access to IRS and other sources for verification of income.

Date: _____

Information needed on spouse, if applicable:

Name _____

Social Security # _____

Date of birth _____

Need Items That Are Checked:

- _____ DD214 or Military Separation Papers (honorable wartime service)
- _____ Marriage Certificate
- _____ Prior Marriage Information
- _____ Prior Divorce Decrees
- _____ Prior Death Certificates
- _____ Birth Certificate Dependent Child/Social Security Card
- _____ Assisted Living Letter (statement on letterhead indicating the date admitted, level of care, and amount paid per month by the veteran)
- _____ Nursing Home (give 21-0779 for nursing home to complete)(If spouse is in nursing home, can give this form for her also.)
- _____ Medicaid Approval Letter (DSS)
- _____ Give VA Form 21-2680 if not in nursing home (This form can be completed for spouse also.)
- _____ Give Caregiver Form if applicable (Can be used for veteran and spouse.)
- _____ Statement for facility providing in-home care on their letterhead with hours of service, services Provided, and how much they are charging.
- _____ POA – if family member inquiring about benefits
- _____ Voided Check (for direct deposit)
- _____ Medicare Card (for veteran only)
- _____ Insurance Card (for veteran only)
- _____ Medicaid Card (for veteran only)

Where did veteran work last? _____ When did the veteran last work? _____

Amount of annual earnings? _____

GROSS INCOME VERIFICATION :

- _____ Social Security Verification Letter (This letter will give amount paid for Parts B/C/D)
- _____ Retirement/Annuity Statement
- _____ Interest/Dividends

ASSETS(current statements on all accounts):

- _____ Stock/Bonds
- _____ Checking/Savings
- _____ CD's
- _____ IRA'S
- _____ Money Market
- _____ Other Property (Value of second homes, business, farm (that is rented out), etc.)

VA does not count the home lived in, car, and a reasonable amount of land.

DEDUCTIBLE EXPENSES THAT CAN BE COUNTED:

- _____ Supplemental Insurance (How much and who with?)
- _____ Burial Expenses (current year only)(need paid receipt)
- _____ Lifeline/Cancer Policy (How much and who with?)