

UPTAKE LIST
UNMARRIED SURVIVING SPOUSE PENSION CLAIM

Date _____

Check AS400 to see what we have on file or deceased card file (some of those files are not in the AS400).

Married to veteran at time of death? ____yes ____no

Spouses must have been married to veteran at the time of death, divorce severs eligibility to benefits; however, if spouse remarried after veteran's death and that marriage was dissolved by divorce or death, spouse may be eligible.

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

ELIGIBILITY FOR DEATH PENSION:

The veteran must have been discharged under conditions other than dishonorable and must have had 90 days or more of active 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 need to bring back.

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

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

FORMS: 21-534EZ, 21-2680 (if applicable), 21-0779(if in a nursing home), 21-4138 (for future use), 21-22, 21P-530 (burial)(if veteran was receiving VA pension or died in VA facility, 40-1330 (marker), 40-0247 (Presidential Memorial Certificate)

FAX THE FOLLOWING: 21-534EZ, 21-2680 OR 21-0779, death certificate, 21-22, Medical Information (if applicable), 21P-530 (if applicable), itemized statement from funeral home, DD214

215-842-4410 (PENSION MANAGEMENT)

If spouse had remarried after veteran passed, would be a good idea to send all marriage licenses, death certificates, and/or divorce decree.

NOTE: If a surviving spouse receives benefits from the VA and passes away, family not entitled to burial allowance ; however, if the VA owed her money, a 21-601 can be completed if the family presents receipts to show they paid any of the last burial and medical expenses after death, not what they paid before death.

Date: _____

*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.

NEED ITEMS THAT ARE CHECKED:

- _____ DD214 or Military Separation Papers (honorable wartime service)
- _____ Marriage Certificate
- _____ Prior Marriage Information (marriage certificate)
- _____ Prior Divorce Decrees
- _____ Death Certificate(s)
- _____ 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 surviving spouse)
- _____ Nursing Home (give 21-0779 for nursing home to complete)
- _____ Medicaid Approval Letter (letter from DSS)
- _____ Give VA Form 21-2680 if not in nursing home
- _____ Give Caregiver Form if someone providing care at home
- _____ Statement from 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
- _____ Insurance Card
- _____ Medicaid Card
- _____ Itemized Paid Statement(from funeral home)(can file for burial if veteran was receiving benefits from VA or died in a VA facility)

GROSS INCOME VERIFICATION:

- _____ Social Security Verification Letter (This letter will give amount paid for Parts B/C/D if it is taken out of Social Security)
- _____ 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)
- _____ Life Line (How much and who with?)
- _____ Cancer Policy (How much and who with?)