



Veteran's Aid & Attendance

GUIDE BOOKLET

LETTER TO VETERANS

It is with my deepest gratitude that I thank you for the service you made preserving our freedoms and fighting for democracy around the world. You, and other Veterans like you, are the reason we can call the United States of America the greatest country in the world.

I see the struggle Veterans like you face every day navigating the VA to receive the benefits you earned in service to our country. My goal is to make that process easier for you. Veterans and their spouses can be eligible for Aid and Attendance benefits to help with the high cost of assisted living. At Harmony Senior Living, we can help you make this process go a little faster.

I am here to advocate on your behalf!

Thank you,



Jenna Williams
Harmony Senior Living Advisors
Founder



GUIDE TO AID AND ATTENDANCE

Veterans who have honorably served our great country could possibly be eligible for the Veteran's Aid and Attendance Pension. This is available to both Veterans and their spouses to help pay for the cost of care for home health care, assisted living, or nursing home care. Because of this benefit, we're often able to help increase the monthly budget available to help Veterans and their families find more suitable long-term living options.

BENEFIT OVERVIEW

\$2,050 per month for a Veteran

\$1,318 per month for a surviving spouse

\$2,431 per month for a married veteran

\$1,610 per month for a Veteran with a spouse that needs care

ELIGIBILITY

GENERAL VA BENEFIT REQUIREMENTS:

Generally, a Veteran must have at least 90 consecutive days of active duty service, with at least one day during a wartime period to qualify for a VA Pension. If you entered active duty after September 7, 1980, generally you must have served at least 24 months or the full period for which you were called or ordered to active duty (with some exceptions), with at least one day during a wartime period.

In addition to meeting minimum service requirements, the Veteran must be:

- ★ Age 65 or older, OR
- ★ Totally and permanently disabled, OR
- ★ A patient in a nursing home receiving skilled nursing care, OR
- ★ Receiving Social Security Disability Insurance, OR
- ★ Receiving Supplemental Security Income

Your yearly family income must be less than the amount set by Congress to qualify for the Veterans Pension benefit. Learn more about income and net worth limitation, and see an example of how VA calculates the VA Pension benefit.

See current income requirements here: www.benefits.va.gov/PENSION/pencalc.asp

The net worth limit to qualify for a Veterans Pension as of November 30, 2022, is \$138,489.

AID & ATTENDANCE

The Aid & Attendance (A&A) increased monthly pension amount may be added to your monthly pension amount if you meet one of the following conditions:

- ★ You require the aid of another person in order to perform personal functions required in everyday living, such as bathing, feeding, dressing, attending to the wants of nature, adjusting prosthetic devices, or protecting yourself from the hazards of your daily environment
- ★ You are bedridden, in that your disability or disabilities requires that you remain in bed apart from any prescribed course of convalescence or treatment
- ★ You are a patient in a nursing home due to mental or physical incapacity
- ★ Your eyesight is limited to a corrected 5/200 visual acuity or less in both eyes; or concentric contraction of the visual field to 5 degrees or less

WARTIME PERIODS

Under current law, VA recognizes the following wartime periods to determine eligibility for VA Pension benefits:

- ★ Mexican Border Period (May 9, 1916 – April 5, 1917 for Veterans who served in Mexico, on its borders, or adjacent waters)
- ★ World War I (April 6, 1917 – November 11, 1918)
- ★ World War II (December 7, 1941 – December 31, 1946)
- ★ Korean conflict (June 27, 1950 – January 31, 1955)
- ★ Vietnam era (February 28, 1961 – May 7, 1975 for Veterans who served in the Republic of Vietnam during that period; otherwise August 5, 1964 – May 7, 1975)
- ★ Gulf War (August 2, 1990 – through a future date to be set by law or Presidential Proclamation)

What to Expect

The Harmony Aid and Attendance worksheet will help you navigate the VA Claims process for the Aid and Attendance benefit. We will advise you about possible qualification based on the information you give us regarding the information below, but only the VA can make the final decision on the approval or denial of your claim. Harmony will provide you with a detailed worksheet to work through with the VA servicemen.

YOUR STEP-BY-STEP GUIDE

STEP 1: Gather the necessary documents and claimant signatures

The most difficult step in the claims process is gathering the necessary documentation and information. We have compiled a list of the documentation you will need to help you through this process. The VA servicemen will also provide you with a set of VA forms to have signed by the Veteran or claimant that they will use to submit the Intent to File and the Formal Claim. We have also listed the link to find these VA forms on the following page.

STEP 2: Make an appointment with the local VA servicemen

All VA forms and claims must be filed through the VA servicemen. We recommend going to your first meeting with AS MUCH documentation from the following page as possible. This will rapidly increase the time you take to file your claim.

phone: (321) 633-2012 • fax: (321) 637-5432
2725 Judge Fran Jamieson Way, Bldg B, Suite 102, Viera, FL 32940

STEP 3: Submit the Intent to File to the VA

This starts the claims process with the VA and locks in the date that the claimant will receive retroactive funds if the claim is accepted through the Veteran's Administration.

STEP 4: Complete the VA Forms for filing

You and the VA servicemen will take the information you provide from Step 1, along with other facility and medical information you gather, and prepare the appropriate VA forms to file the Aid and Attendance claim with the VA.

STEP 5: Submit Formal Claim for VA Aid and Attendance pension

The local VA servicemen will file your formal claim with the VA. The local office we recommend is a branch of the American Legion. They are located in the Viera Brevard County building. The local VA serviceman will review the claim and then file with the Veteran's Administration for final approval or denial.

STEP 6: Receive Status of Claim

Ideally, you learn of approval by pension funds being deposited in the specified bank account. But, in many cases you will receive an approval letter in the mail. If your claim is denied, you will receive a letter of denial, with reason, from the VA. At this point you can usually file an appeal if you feel the claim was wrongfully denied.

IF YOU RECEIVE A LETTER REQUESTING MORE INFORMATION FOR YOUR CLAIM YOU MUST IMMEDIATELY NOTIFY THE VA SERVICEMEN, WITH THE REQUESTED INFORMATION, AND SEND TO THE VA AS QUICKLY AS POSSIBLE. YOUR CLAIM MAY BE DENIED IF YOU FAIL TO RESPOND BY THE DATE THEY LIST ON THE REQUEST.

VA CONTACT INFO: APPT REQUIRED

phone: (321) 633-2012 • fax: (321) 637-5432

2725 Judge Fran Jamieson Way, Bldg B, Suite 102, Viera, FL 32940

All VA forms listed below will be required for your claim for Aid and Attendance. In order to expedite your claim, we are giving you a headstart before you make your appointment with the VA serviceman. Harmony recommends you complete your Intent to File paperwork BEFORE your first meeting with the serviceman, and compile as much documentation as you can from the list of supporting documents. This will make the process much easier for everyone involved.

Intent to File (All documents below will be completed by you and require the signature of the claimant.)

S : C

- VA Form 21-0845 Authorization to Disclose Personal Information to a Third Party
- VA Form 21-22 Appointment of Veteran's Service Organization as Claimant's Representative
- VA Form 21-0966 Intent to File a Claim for Compensation and/or Pension, or Survivors Pension and/or DIC
- Information Sheet

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Supporting Documents (The following documents will be provided by the family or claimant to the VA serviceman.)

- SSN CARD FOR SURVIVING SPOUSE
- DD FORM 214 OR VETERAN'S DISCHARGE PAPER
 - i. If this can't be located, request one at <https://vetrecs.archives.gov/VeteranRequest/home.html>
- MARRIAGE, DIVORCE, AND DEATH CERTIFICATES (IF APPLICABLE)
 - i. The VA requires a date, location, and spouse name for **ALL** marriages and divorces. (claimant and/or Veteran)
 - ii. The VA requires a death date and location if the Veteran has passed away.
 - iii. If you're having trouble locating certain documents some helpful resources can be found below:
 - iii.i. Ancestry, Beenverified.com, Clerk of Courts and Vital Statistics in the county or state of the event
 - iv. **DEATH CERTIFICATES FOR VETERANS MUST INCLUDE CAUSE OF DEATH**
- Net worth information (excluding home, car, clothing, furniture, and jewelry)
 - i. Info/statement for EACH asset in the claimant's name (bank statements, IRA, liquid assets, money markets, etc.)
- Income Statement/Verification from each source (SSAN, pension, income, & etc.)
 - i. We will need one month of bank statements, SS statement, pension statement, etc., to show income verification.
- Medical Insurance payment verification (Medicare, Medicaid, Blue Cross/Blue Shield, etc.)
- Direct Deposit Information (voided check) - where would you like funds deposited each month?

VA Forms (All VA FORMS can be found at www.va.gov/find-forms/ and other forms listed will be provided from servicemen.)

S : C

- VA FORM 21-526EZ (disability) / 21-527EZ (veteran) / 21-534EZ (spouse) - (**application for pension**)
- VA FORM 21-2680 (**signed by a pcp or physician at current facility**) (Exam for Housebound and A&A Benefits)
- VA FORM 21-0969 (Income and Asset Statement)
- ALF/NURSING HOME FORM LETTER OR IN-HOME HEALTH CARE LETTER (**filled out and signed by ALF**)
 - i. This form is what will prove that the claimant has a need for the Aid and Attendance benefit.
- ALF CARE PLAN (**detail of care filled out and signed by ALF**)

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** S = Signed | C = Completed