

VA



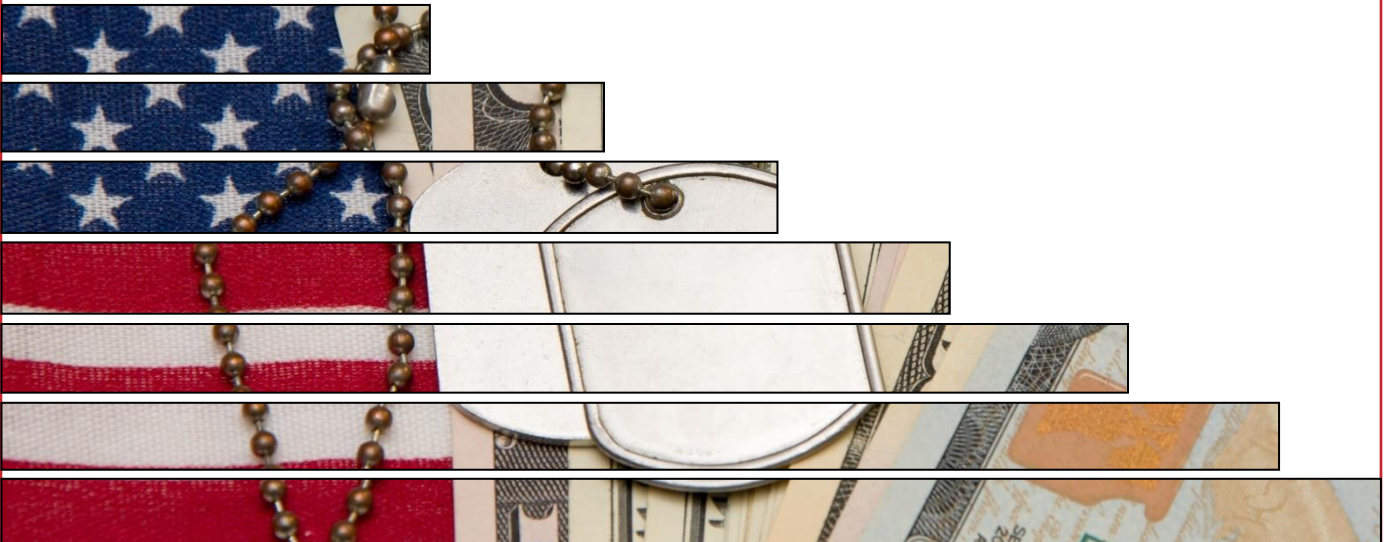
U.S. Department
of Veterans Affairs

FOCUS

SPECIAL MONTHLY PENSION ALLOWANCE RESOURCE GUIDE

to help caregivers and families focus on what matters

- F** Finding Care
- O** Overview of Benefits
- C** Caring Assistance
- U** Useful Resources for Families & Caregivers
- S** Supplemental VA & Community Resources



The Department of Veterans Affairs (VA) offers Veterans Pension with Special Monthly Pension for certain Veterans who need enhanced care. Use this **FOCUS Special Monthly Pension Allowance Resource Guide** to navigate the best care options for your family and determine how those care options impact eligibility to Veterans Pension with Special Monthly Pension.

F Finding Care

Determine which of the available care options and facilities is best for your family's needs.

O Overview of Benefits

Better understand the impact of different care options on Special Monthly Pension eligibility.

C Caring Assistance

Find out how to obtain assistance when you need it, including people to whom you can turn for representation or additional information.

U Useful Resources for Families & Caregivers

Explore additional materials to help you through the application process, such as step-by-step guides specifically for caregivers and worksheets to help calculate income for VA purposes.

S Supplemental VA and Community Resources

Discover a variety of available tools that will help you plan for the finer details as the Veteran transitions into different care environments and applies for VA benefits.

There are many [care choices](#) available depending on the level of assistance required with activities of daily living (ADLs). ADLs are basic self-care activities and consist of bathing or showering, dressing, eating, toileting, transferring, and ambulating within the home or living area. In order to claim medical expenses associated with private caretaker assistance with ADLs, the Veteran must actually be paying the caretaker the claimed amount for the expense to be considered an unreimbursed medical expense.



In-Home Care

The individual needing care can live independently at home and receives assistance with their daily activities from a certified or uncertified attendant. Generally, fees are paid directly to the attendant.



Independent Living

The individual needing care can live independently but needs a protected environment. Minimal to no assistance with daily activities is provided by the facility. Generally, only rent is paid to the facility.



Assisted Living

The individual cannot live independently and requires a protected environment. Some assistance with daily activities is provided by the facility. Generally, fees paid to the facility include room, board and care.



Nursing Home Care

The individual cannot live independently, requires a protected environment and needs skilled nursing care. Fees paid directly to the facility include room, board and care.



Veterans Homes

State-run Veterans Homes may offer independent or assisted living, or nursing home care. Contact the closest [Veterans Home](#) for more information about residence, care and payment options.

Overview of Benefits

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[Veterans Pension](#) is an income-based program that can assist with a Veteran's financial need.

[Special Monthly Pension](#) (SMP) can help offset the cost of a Veteran's care. To receive SMP, Veterans must demonstrate they meet specific level of care and provider requirements.



What is the Impact of Different Care Options on Veterans Pension with SMP?

Medical need and medical expenses both play a role in eligibility for SMP:

Medical Need

Can be demonstrated by

- A [VA Form 21-2680](#), *Examination for Housebound Status or Permanent Need for Regular Aid and Attendance*, and/or
- Equivalent documentation from a medical professional such as a private physician, certified nurse practitioner, clinical nurse specialist or physician assistant documenting diagnosis and any limitations on ADLs.

Medical Expenses

Used to reduce [countable income](#) for Veterans Pension

- Care expenses can be deducted if a Veteran is approved for the SMP allowance and receiving care from a certified or uncertified provider. If the Veteran is **not** approved for SMP, he or she must submit evidence of the ADLs with which the provider assists.



When and How Should Veterans Apply?

Not Ready to Apply

If the Veteran **is not** already in receipt of Veterans Pension, consider submitting a [VA Form 21-0966](#), *Intent to File*, with "Pension" checked. This will hold the effective date for one year, allowing you time to help the Veteran find the care they need, gather the appropriate evidence, and submit a formal application.

Ready to Apply

If the Veteran **is not** already in receipt of Veterans Pension, submit a [VA Form 21P-527EZ](#), *Application for Veterans Pension*, with the VA Form 21-2680 noted above.

If the Veteran **is** in receipt of Pension but needs additional care, submit a [VA Form 20-0995](#), *Decision Review Request: Supplemental Claim*, a [VA Form 21-2680](#), and also include the following:

- [VA Form 21P-8416](#), *Medical Expense Report*, if claiming care expenses.
- [VA Form 21-0779](#), *Request for Nursing Home Information in Connection with Claim for Aid and Attendance*, if reporting a nursing facility/home.

Caring Assistance

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There are numerous organizations and individuals who can help guide you and your family through the application process.



Reach out to an accredited [Veterans Service Organization](#) (VSO). This [Directory](#) will help you locate one near you. To appoint a VSO, complete a [VA Form 21-22, Appointment of Veterans Service Organization as Claimant's Representative](#).



Become a Veteran's Authorized Third Party by completing a [VA Form 21-0845, Authorization to Disclose Personal Information to a Third Party](#).



Appoint an [accredited](#) or other Private Attorney by using a [VA Form 21-22a, Appointment of Individual as Claimant's Representative](#).



Contact your local County Veterans Service Officer using this [Directory](#).

Contact VA

Get answers directly from the Department of Veterans Affairs by

- Exploring online [resources](#);
- Submitting your question through the [Ask VA \(AVA\) platform](#);
- Calling the VA benefits hotline at [\(800\) 827-1000](#); or
- Contacting your local VA facility according to this [Directory](#).

Useful Resources for Families and Care Providers

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The following tools supplement this ICARE Special Monthly Pension Resource Guide:



[Income for VA Purposes Calculation Worksheet](#)



[Step-by-Step Checklist for Caregivers](#)

Supplemental VA and Community Resources

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[VA Money Management Tools](#)



[End of Life Planning](#)



[VA Financial Literacy Website](#)



[Medicaid Resources](#)



[Care Provider Support](#)



[VA Medical Foster Home Program](#)