



**Hillsborough  
County Florida**

**U.S. Dept. of Veterans Affairs Financial Assistance:  
Aid and Attendance or Housebound Pension  
For Surviving Spouses of Wartime Veterans**

- Ensure criteria on Tab "A" is met before continuing
- Obtain required documents and applicable Information in Tab
- Provide required information on Tab "C" Worksheet
- Provide The VA Form 21-2680, Examination for Housebound Status or Permanent Need for Aid and Attendance. Please make sure every box is complete and signed by a Physician, Physician Assistant (PA), Certified Nurse Practitioner (CNP), or Clinical Nurse Specialist (CNS).
- Complete ONE of the following;
  - Tab D-1 and D-2 for Assisted Living Facility (ALF)
  - Tab E-1 and E-2 for In Home Care Assistance

Deliver the completed documents with supporting documentation to a Veterans Service Officer.  
Please do not fax or mail.

**Consumer and Veterans Services Main office:**

3602 US HWY 301 N.  
Tampa, FL 33619

Phone: (813) 635-8316

Fax: (813) 272-5002

Email: [cvs@hcflgov.net](mailto:cvs@hcflgov.net)

More locations on our website:

<https://www.hillsboroughcounty.org/en/residents/social-services/veterans/find-veterans-services-offices>

**Brandon Regional Service  
Center:**

311 Pauls Dr., Suite 100  
Brandon, FL 33511  
(813) 635-8316

**South Shore Regional**

**Service Center:**  
410 30<sup>th</sup> St. E., Suite 104  
Ruskin, FL 33570  
(813) 641-6996

**James A. Haley VA  
Primary Care Annex:**  
13615 Lake Terrace Lane  
Tampa, FL 33637  
(813) 903-4884

## VA PENSION CRITERIA

Generally, a Veteran must have at least 90 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 **AND**
- Must be receiving care in either an Assisted Living Facility (ALF) or with a In-Home Health Care provider at the time of submission of or prior to submission of the claim.

Your yearly family income must be less than the amount set by Congress to qualify for the Veterans Pension benefit. If eligible, your pension benefit is the difference between your "countable" income and the annual pension limit set by Congress. VA generally pays this difference in 12 equal monthly payments. For additional information, please visit: <http://www.benefits.va.gov/pension/index.asp>

### Eligible Wartime Periods

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

- 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)

### Aid & Attendance (A&A)

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

### Housebound

This increased monthly pension amount may be added to your monthly pension amount when you are substantially confined to your immediate premises because of permanent disability.

## REQUIRED SUPPORTING DOCUMENTATION FOR PENSION

- DISCHARGE / SEPARATION MILITARY PAPERS (DD-214):  
To request Military discharge or records, complete form SF-180 or refer to the following website:  
<https://www.archives.gov/>
- COPY OF MARRIAGE CERTIFICATE:  
If previously married: Please provide information for both the Veteran and spouse. Include the name, date, and place of both the marriage and end of marriage as well as the reason for termination of marriage.
- COPY OF DEATH CERTIFICATE (WIDOW ONLY):  
Must show cause of death (This will be the long form if the death occurred in Florida.)
- COPY OF CURRENT SOCIAL SECURITY AWARD LETTER(s)
- PROOF OF ALL MONTHLY GROSS INCOME:  
Retirement pensions, Income, Interest, Trust, etc. You will need to provide for both the Veteran and spouse. Often listed on monthly bank statements.
- HOUSEHOLD NET WORTH INFORMATION:  
All banking; Stocks, Bonds, IRA's, CD's, Annuities, Properties other than primary residence.
- HOUSEHOLD PRIVATE INSURANCE PREMIUMS: Not reimbursed.
- VOIDED CHECK FOR DIRECT DEPOSIT OF PENSION
- PHYSICIAN'S FORM (VA FORM 21-2680):  
Must show complete diagnosis, inability to live independently and the need of assistance with activities of Daily Living (ADLs). Please make sure every box is complete and signed by a Physician, Physician Assistant (PA), Certified Nurse Practitioner (CNP), or Clinical Nurse Specialist (CNS). Provider's signature, address, and telephone number is required.
- APPLICABLE CARE WORKSHEETS: Assisted Living (Tab D-1 & D-2) / In Home Attendant (Tab E-1 & E-2)
- VA Form 21P-0969, INCOME AND ASSET STATEMENT IN SUPPORT OF CLAIM FOR PENSION OR PARENT'S DIC may need to be completed along with the pension or survivor pension form in many cases due to the net worth transfer reporting requirements.  
The VAF 21P-0969 must be completed if the Veteran or Survivor has income other than Social Security, has land that can be sold without selling their primary residence, and/or has more than \$10,000 in assets or has transferred assets in the previous 3 years.

**WORKSHEET**

POINT OF CONTACT	
ADDRESS	
CITY, STATE, ZIP	
TELEPHONE	
EMAIL	

**VETERAN'S INFORMATION**

NAME		SSN	
DATE OF BIRTH		DATE ENTERED	
PLACE OF BIRTH		MIL/SERVICE NUMBER	
DATE OF DEATH		DATE LEFT MILITARY	
PLACE OF DEATH		BRANCH OF SERVICE	

**SPOUSE'S INFORMATION**

NAME	DATE OF BIRTH	SSN
DATE OF MARRIAGE	PLACE OF MARRIAGE	

**MONTHLY GROSS INCOME**

<b>VETERAN'S INCOME</b>		<b>SPOUSE'S INCOME</b>	
SOCIAL SECURITY		SOCIAL SECURITY	
PENSION		PENSION	
INTEREST		INTEREST	
OTHER SOURCES		OTHER SOURCES	

**TOTAL ASSETS**

*(DO NOT INCLUDE HOME OR AUTOMOBILE)*

	<b>VETERAN</b>	<b>SPOUSE</b>
CHECKING		
SAVINGS		
STOCKS		
BONDS		
CDs		
ETC		

**TOTAL MONTHLY EXPENDITURES**

	<b>VETERAN</b>	<b>SPOUSE</b>
ASSISTED LIVING FACILITY		
IN HOME HEALTH CARE		
MEDICARE PART (B)		
MEDICARE PART (D)		
PRIVATE MEDICAL INS.		
OTHER		



**Department of Veterans Affairs**

VA DATE STAMP  
 DO NOT WRITE IN THIS SPACE

**EXAMINATION FOR HOUSEBOUND STATUS OR PERMANENT  
 NEED FOR REGULAR AID AND ATTENDANCE**

**SECTION I: VETERAN'S IDENTIFICATION INFORMATION**

**NOTE:** You can *either* complete the form online or by hand. Please print the information requested in ink, neatly and legibly to help process the form.

1. VETERAN/BENEFICIARY NAME (First, Middle Initial, Last)		
<input style="width:100%; height: 20px;" type="text"/>		
2. SOCIAL SECURITY NUMBER	3. VA FILE NUMBER (If applicable)	4. DATE OF BIRTH (MM/DD/YYYY)
<input style="width: 20px; height: 20px;" type="text"/> - <input style="width: 20px; height: 20px;" type="text"/> - <input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	Month      Day      Year <input style="width: 20px; height: 20px;" type="text"/> - <input style="width: 20px; height: 20px;" type="text"/> - <input style="width: 40px; height: 20px;" type="text"/>
5. VETERAN'S SERVICE NUMBER (If applicable)	6. GENDER	
<input style="width: 40px; height: 20px;" type="text"/>	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE	
7. TELEPHONE NUMBER (Include Area Code)	8. PREFERRED E-MAIL ADDRESS (Optional)	
<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	
9. PREFERRED MAILING ADDRESS (Number and street or rural route, P. O. Box, City, State, ZIP Code and Country)		
<input style="width: 100%; height: 20px;" type="text"/>		
No. & Street	<input style="width: 100%; height: 20px;" type="text"/>	
Apt./Unit Number	City	<input style="width: 100%; height: 20px;" type="text"/>
State/Province	Country	ZIP Code/Postal Code
<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/> - <input style="width: 40px; height: 20px;" type="text"/>

**SECTION II: CLAIM INFORMATION**

10. CLAIMANT'S NAME (First, Middle Initial, Last)	11. CLAIMANT'S SOCIAL SECURITY NUMBER	12. RELATIONSHIP OF CLAIMANT TO VETERAN
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/> - <input style="width: 20px; height: 20px;" type="text"/> - <input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
13. BENEFIT YOU ARE APPLYING FOR (Choose One)		
<input type="checkbox"/> <b>Special Monthly Compensation (SMC)</b> - Veterans and surviving spouses or parents who are eligible to receive VA compensation due to a service-related disability or death and require aid and attendance of another person to perform personal functions required in everyday living such as bathing, feeding, dressing, attending to the wants of nature, adjusting prosthetic devices, or protecting oneself from the hazards of the daily environment may be eligible for Special Monthly Compensation. A Veteran or a deceased Veteran's surviving spouse may also be eligible for Special Monthly Compensation based on being housebound (substantially confined to the immediate premises because of permanent disability). For a Veteran, the disability causing the need for aid and attendance or housebound status must be related to service. These benefits are paid in addition to monthly compensation. They are not paid <u>without</u> eligibility to compensation.		
<input type="checkbox"/> <b>Special Monthly Pension (SMP)</b> - Veterans and survivors who are eligible for Veteran's Pension and/or Survivors benefits and require the aid and attendance 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 him/her from the hazards of his/her daily environment, or are housebound (substantially confined to his/her immediate premises because of permanent disability), may be eligible for Special Monthly Pension (SMP). This benefit is an increased monthly amount paid to a Veteran or survivor who is eligible for Veterans Pension or Survivors benefits.		

**SECTION III: INFORMATION OF EXAMINATION**

14. DATE OF EXAMINATION	15. HOME ADDRESS	
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	
16A. IS CLAIMANT HOSPITALIZED?	16B. DATE ADMITTED	16C. NAME AND ADDRESS OF HOSPITAL
<input type="checkbox"/> YES <input type="checkbox"/> NO    (If "Yes," complete Items 16B and 16C)	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

**NOTE: EXAMINER PLEASE READ CAREFULLY**

The purpose of this examination is to record manifestations and findings pertinent to the question of whether the claimant is housebound (confined to the home or immediate premises) or in need of the regular aid and attendance of another person. The report should be in sufficient detail for the VA decision makers to determine the extent that disease or injury produces physical or mental impairment, that loss of coordination or enfeeblement affects the ability: to dress and undress; to feed him/herself; to attend to the wants of nature; or keep him/herself ordinarily clean and presentable. Findings should be recorded to show whether the claimant is blind or bedridden. Whether the claimant seeks housebound or aid and attendance benefits, the report should reflect how well he/she ambulates, where he/she goes, and what he/she is able to do during a typical day.

17. COMPLETE DIAGNOSIS (Diagnosis needs to equate to the level of assistance described in questions 25 through 39)

18A. AGE	18B. WEIGHT ACTUAL: LBS.                      ESTIMATED: LBS.	18C. HEIGHT FEET:                      INCHES:
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19. NUTRITION	20. GAIT
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21. BLOOD PRESSURE	22. PULSE RATE	23. RESPIRATORY RATE	24. WHAT DISABILITIES RESTRICT THE LISTED ACTIVITIES/FUNCTIONS?
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25. IF THE CLAIMANT IS CONFINED TO BED, INDICATE THE NUMBER OF HOURS IN BED  
 From 9 PM to 9 AM:                      From 9 AM to 9 PM:

26. IS THE CLAIMANT ABLE TO FEED HIM/HERSELF? (If "No," provide explanation)

YES     NO

27. IS CLAIMANT ABLE TO PREPARE OWN MEALS? (If "No," provide explanation)

YES     NO

28. DOES THE CLAIMANT NEED ASSISTANCE IN BATHING AND TENDING TO OTHER HYGIENE NEEDS? (If "Yes," provide explanation)

YES     NO

29A. IS THE CLAIMANT LEGALLY BLIND? (If "Yes," provide explanation)	29B. CORRECTED VISION	
	LEFT EYE	RIGHT EYE

YES     NO

30. DOES THE CLAIMANT REQUIRE NURSING HOME CARE? (If "Yes," provide explanation)

YES     NO

31. DOES THE CLAIMANT REQUIRE MEDICATION MANAGEMENT? (If "Yes," provide explanation)

YES     NO

32. IN YOUR JUDGMENT, DOES THE VETERAN/CLAIMANT HAVE THE MENTAL CAPACITY TO MANAGE HIS OR HER BENEFIT PAYMENTS, OR IS HE OR SHE ABLE TO DIRECT SOMEONE TO DO SO? (If "No," provide examples and rationale to support your conclusion.)

YES     NO

33. POSTURE AND GENERAL APPEARANCE *(Attach a separate sheet of paper if additional space is needed)*

34. DESCRIBE RESTRICTIONS OF EACH UPPER EXTREMITY WITH PARTICULAR REFERENCE TO GRIP, FINE MOVEMENTS, AND ABILITY TO FEED HIM/HERSELF, TO BUTTON CLOTHING, SHAVE AND ATTEND TO THE NEEDS OF NATURE *(Attach a separate sheet of paper if additional space is needed)*

35. DESCRIBE RESTRICTIONS OF EACH LOWER EXTREMITY WITH PARTICULAR REFERENCE TO THE EXTENT OF LIMITATION OF MOTION, ATROPHY, AND CONTRACTURES OR OTHER INTERFERENCE. IF INDICATED, COMMENT SPECIFICALLY ON WEIGHT BEARING, BALANCE AND PROPULSION OF EACH LOWER EXTREMITY.

36. DESCRIBE RESTRICTION OF THE SPINE, TRUNK AND NECK

37. SET FORTH ALL OTHER PATHOLOGY INCLUDING THE LOSS OF BOWEL OR BLADDER CONTROL OR THE EFFECTS OF ADVANCING AGE, SUCH AS DIZZINESS, LOSS OF MEMORY OR POOR BALANCE, THAT AFFECTS CLAIMANT'S ABILITY TO PERFORM SELF-CARE, AMBULATE OR TRAVEL BEYOND THE PREMISES OF THE HOME, OR, IF HOSPITALIZED, BEYOND THE WARD OR CLINICAL AREA. DESCRIBE WHERE THE CLAIMANT GOES AND WHAT HE OR SHE DOES DURING A TYPICAL DAY.

38. DESCRIBE HOW OFTEN PER DAY OR WEEK AND UNDER WHAT CIRCUMSTANCES THE CLAIMANT IS ABLE TO LEAVE THE HOME OR IMMEDIATE PREMISES

39. ARE AIDS SUCH AS CANES, BRACES, CRUTCHES, OR THE ASSISTANCE OF ANOTHER PERSON REQUIRED FOR LOCOMOTION? *(If so, specify and describe effectiveness in terms of distance that can be traveled, as in Item 32 above)*

YES *(If "YES," give distance) (Check applicable box or specify distance)*
 1 BLOCK
  5 or 6 BLOCKS
  1 MILE
 OTHER *(Specify distance)* \_\_\_\_\_

NO

40A. PRINTED NAME OF EXAMINING PHYSICIAN	40B. SIGNATURE AND TITLE OF EXAMINING PHYSICIAN	40C. DATE SIGNED
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41A. NAME AND ADDRESS OF MEDICAL FACILITY	41B. TELEPHONE NUMBER OF MEDICAL FACILITY <i>(Include Area Code)</i>
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**PRIVACY ACT NOTICE:** The VA will not disclose information collected on this form to any source other than what has been authorized under the Privacy Act of 1974 or Title 38, code of Federal Regulations 1.576 for routine uses (i.e., civil or criminal law enforcement, congressional communications, epidemiological or research studies, the collection of money owed to the United States, litigation in which the United States is a party or has an interest, the administration of VA programs and delivery of VA benefits, verification of identity and status, and personnel administration) as identified in the VA system of records. 58VA21/22/28, Compensation, Pension, Education and Vocational Rehabilitation and Employment Records - VA, published in the Federal Register. Your obligation to respond is required to obtain or retain benefits. Giving us your Social Security Number (SSN) account information is mandatory. Applicants are required to provide their SSN under Title 38, U.S.C. 5701(c)(1). The VA will not deny an individual benefits for refusing to provide his or her SSN unless the disclosure is required by a Federal Statute of law in effect prior to January 1, 1975, and still in effect. The requested information is considered relevant and necessary to determine maximum benefits provided under the law. The responses you submit are considered confidential (38 U.S.C. 5701). Information that you furnish may be utilized in computer matching programs with other Federal or state agencies for the purpose of determining your eligibility to receive VA benefits, as well as to collect any amount owed to the United States by virtue of your participation in any benefit program administered by the Department of Veterans Affairs.

**RESPONDENT BURDEN:** We need this information to determine your eligibility for aid and attendance or housebound benefits. Title 38, United States Code 1521 (d) and (e), 1115(1)(e), 1311(c) and (d), 1315(h), 1122, 1541(d)(e), and 1502 (b) and (c) allows us to ask for this information. We estimate that you will need an average of 30 minutes to review the instructions, find the information, and complete this form. VA cannot conduct or sponsor a collection of information unless a valid OMB control number is displayed. You are not required to respond to a collection of information if this number is not displayed. Valid OMB control numbers can be located on the OMB Internet page at <http://www.reginfo.gov/public/do/PRAMain>. If desired, you can call 1-800-827-1000 to get information on where to send comments or suggestions about this form.

**WORKSHEET FOR AN ASSISTED LIVING, ADULT DAY CARE, OR A SIMILAR FACILITY**

**NOTE:** Only complete this worksheet if you are claiming expenses for an assisted living facility, adult day care or similar facility.

**IMPORTANT:** VA recognizes the following five activities as Activities of Daily Living (ADLs) for medical expense purposes:

- (1) Eating
- (2) Bathing/Showering
- (3) Dressing
- (4) Transferring (for example, from bed to chair)
- (5) Using the toilet

Custodial Care is regular -  
 • assistance with two or more ADLs, or  
 • supervision because a person with a mental disorder is unsafe if left alone due to the mental disorder.

**INSTRUCTIONS:** Use this worksheet if you are claiming a disabled person's care in an assisted living facility, adult day care, or similar facility as unreimbursed medical expenses. Follow the steps below to determine whether VA may deduct all or some of your out-of-pocket payments to the facility.

**STEP 1.** Are the expenses you wish to claim due to the disabled person's treatment in a hospital, inpatient treatment center, nursing home, or VA approved medical foster home?  
 (If "NO," continue to Step 2)

YES  NO (If "YES," all payments to the facility qualify as medical expenses in Items 45A thru 45F. You are finished completing this worksheet)

**STEP 2.** Do all of the following apply to the facility?

- The facility is licensed (if the State or Country requires it)
- The facility's staff (or the facility's contracted staff) provides the disabled person with health care or custodial care or both.
- If the facility is residential, it is staffed 24 hours per day with caregivers.

YES  NO (If "NO," payments to the facility do not qualify as medical expenses. You are finished completing this worksheet)

**STEP 3.** Are you (the claimant) the disabled person, a surviving spouse, or a Parents' DIC claimant?

YES  NO (If "NO," skip to Step 6)

**STEP 4.** Did you claim special monthly pension or special monthly DIC in Item 37?

YES  NO (If "NO," payments to this facility for meals and lodging do not qualify as medical expenses. Only claim amount you pay the facility for health care services or assistance with ADLs provided by a health care provider in Items 45A thru 45F. Skip to Step 8)

**STEP 5.** If you answered "YES" in Step 2, you stated that the facility provides you with health care and/or custodial care. Is this the primary reason you live in the facility (or attend day care in the facility)?

YES  NO (If "YES," all payments to this facility may qualify as medical expenses in Items 45A thru 45F if VA rates you as eligible for special monthly pension or special monthly DIC. Please report the amount you pay the facility for lodging and meals separate from the amount you pay the facility for health care services or assistance with ADLs provided by a health care provider as medical expenses in Items 45A thru 45F. Skip to Step 8)  
 (If "NO," payments to this facility for meals and lodging do not qualify as medical expenses. Please report separately in Items 45A thru 45F applicable amounts you pay the facility for: (1) health care services or assistance with ADLs provided by a health care provider; and (2) custodial care. Skip to Step 8)

**STEP 6.** Does the disabled person require the health care services or custodial care that the facility provides to him or her because of the disabled person's mental or physical disability?

YES  NO (If "YES," you must submit a statement from a physician or physician assistant that (1) the disabled person requires the health care services or custodial care that the facility provides to him or her because of mental or physical disability, and (2) describes the mental or physical disability)  
 (If "NO," claim payments you pay this facility for health care services or assistance with ADLs provided by a health care provider in Items 45A thru 45F. Skip to Step 8)

**STEP 7.** If you answered "YES" in Step 2, you stated that the facility provides the disabled person with health care and/or custodial care. Is this the primary reason the disabled person lives in the facility (or attends day care in the facility)?

YES  NO (If "YES," claim all payments to this facility (to include meals and lodging) as medical expenses in Items 45A thru 45F)  
 (If "NO," only claim payments you pay the facility for assistance with health care and/or assistance with custodial care as medical expenses in Items 45A thru 45F. Payment to this facility for meals and lodging do not qualify)

**STEP 8. Facility Certification:** Please submit a current statement showing the fees the claimant pays to your facility and a breakdown of the care received.

I CERTIFY that the information stated within this WORKSHEET FOR AN ASSISTED LIVING, ADULT DAY CARE, OR SIMILAR FACILITY is accurate and reflects the current environment pertaining to \_\_\_\_\_ (Name of person staying at your facility) and his or her care at this facility \_\_\_\_\_ (Name and address of facility)

\_\_\_\_\_  
 (Name, Signature and Title of Person Certifying for the Facility) (Date Certified)



**ASSISTED LIVING MONTHLY EXPENSE INFORMATION**

DATE: \_\_\_/\_\_\_/\_\_\_

\_\_\_\_\_ (client) was admitted on \_\_\_/\_\_\_/\_\_\_ (date) to the  
 Personal care Unit of \_\_\_\_\_ (facility name).

Total monthly expenses for services provided \$ \_\_\_\_\_ (all inclusive).

- Meals – needs help or nutritional assistance.
- Hands on assist with shower/bathing, personal hygiene and dressing.
- Incontinence of urine and needs assistance for hygiene and assessment of skin.
- Supervision of ambulation for safety, as well as other interventions as needed.
- Supervision of medication which includes ordering, controlling and assistance with self-administration.
- Diminished dexterity needing additional help for daily activities of living (ADLs).
- Frequent verbal direction and mental stimulation due to diminished mental status.
- Speech/communication of deficiency which inhibits resident's ability to convey needs.
- Within a 24 hour period, Requires on an average of 2 hours of Certified Nursing Aid (CNA) and 30 minutes of Licensed Practical Nurse (LPN) monthly to manage daily activities of living (ADLs).

Assisted Living Administrator/ Representative

\_\_\_\_\_/\_\_\_\_\_  
 (Printed Name) (Signature)

\_\_\_\_\_/\_\_\_\_\_  
 (Title) (License #)

Address of Facility:

\_\_\_\_\_  
 (Street) Telephone: (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_  
 (City, State, Zip) Fax: (\_\_\_\_) \_\_\_\_\_

Email (Optional): \_\_\_\_\_

Claimant's VA File Number: \_\_\_\_\_ (For Official Use Only)

**WORKSHEET FOR IN-HOME ATTENDANT EXPENSES**

**NOTE:** Only complete this worksheet if you are claiming expenses for in-home care.

**IMPORTANT:** VA recognizes the following five activities as Activities of Daily Living (ADLs) for medical expense purposes:

- (1) Eating
- (2) Bathing/Showering
- (3) Dressing
- (4) Transferring (for example, from bed to chair)
- (5) Using the toilet

Custodial Care is regular -

- assistance with two or more ADLs, or
- supervision because a person with a mental disorder is unsafe if left alone due to the mental disorder

**IMPORTANT:** The following activities are examples of Instrumental Activities of Daily Living (IADLs) for VA purposes. VA generally *does not* recognize assistance with these activities as medical expenses: (1) Shopping; (2) Food Preparation; (3) Housekeeping; (4) Laundering; (5) Handling medications; (6) Using the telephone; (7) Transportation (except for medical purposes such as transportation to a doctor's appointment).

**INSTRUCTIONS:** Use this worksheet if you are claiming payments to a disabled person's in-home attendant as an unreimbursed medical expense.

Follow the steps below to determine whether or not:

- the attendant must be a health care provider for VA purposes *and*
- VA may deduct payment for assistance with IADLs as well as assistance with ADLs and custodial care

**STEP 1.** Are you (the claimant) the disabled person, a surviving spouse, or a Parents' DIC claimant?

YES  NO (If "NO," skip to Step 4)

**STEP 2.** Did you claim special monthly pension on Item 37?

YES  NO (If "NO," payments to this in-home attendant for assistance with IADLs *do not* qualify as medical expenses. Please report separately in Items 45A thru 45F applicable amounts you pay an in-home attendant for: (1) health care services or assistance with ADLs provided by a health care provider and (2) custodial care. Skip to Step 6)

**STEP 3.** Is the *primary responsibility* of the in-home attendant to provide you with health care or custodial care?

YES  NO (If "YES," payments to this in-home attendant *may* qualify as medical expenses in Items 45A thru 45F if VA rates you as eligible for special monthly pension. Please report separately in Items 45A thru 45F amounts you pay an in-home attendant for: (1) health-care services or assistance with ADLs provided by a health care provider, (2) assistance with IADLs, and (3) custodial care. Skip to Step 6)  
(If "NO," payments to this in-home attendant for assistance with IADLs *do not* qualify as medical expenses. Please report separately in Items 45A thru 45F applicable amounts you pay an in-home attendant for: (1) health care services or assistance with ADLs provided by a health care provider and (2) custodial care. Skip to Step 6)

**STEP 4.** Does the disabled person require the health care services or custodial care that the in-home attendant provides to him or her because of the disabled person's mental or physical disability?

YES  NO (If "YES," you must submit a statement from a physician or physician assistant that (1) the disabled person requires the health care services or custodial care that the in-home attendant provides to him or her because of mental or physical disability, and (2) describes the mental or physical disability)  
(If "NO," the attendant *must be a health care provider*. Only report payments to the in-home attendant for *health care services or assistance with ADLs* provided by the health care provider as medical expenses in Items 45A thru 45F. Payments for assistance with IADLs *do not* qualify as medical expenses. Skip to Step 6)

**STEP 5.** Is the *primary responsibility* of the in-home attendant to provide the disabled person with health care or custodial care?

YES  NO (If "YES," payments to the in-home attendant qualify as medical expenses (even assistance with IADLs) and can be reported in Items 45A thru 45F)  
(If "NO," report payments to this in-home attendant for *health care and/or custodial care* as medical expenses in Items 45A thru 45F. Payments for assistance with IADLs *do not* qualify as medical expenses)

**STEP 6.** Check all activities below that the attendant assists the veteran or disabled person with:

- ADLs:  EATING  BATHING/SHOWERING  DRESSING  TRANSFERRING  USING THE TOILET
- IADLs:  SHOPPING  FOOD PREPARATION  HOUSEKEEPING  LAUNDERING  MANAGING FINANCES  HANDLING MEDICATIONS
- USING THE TELEPHONE  TRANSPORTATION FOR NON-MEDICAL PURPOSES

**STEP 7. In-Home Attendant Certification:** Please submit a current breakdown of the time the attendant spends assisting the veteran or disabled person with health care services, ADLs and IADLs.

I CERTIFY that the information stated within this WORKSHEET FOR IN-HOME ATTENDANT EXPENSES is accurate and

reflects the current environment pertaining to \_\_\_\_\_ (Name of Person Requiring Care)

and his or her care from \_\_\_\_\_ (Name of Attendant)

\_\_\_\_\_  
(Name, Signature and Title of Certifying Official)

\_\_\_\_\_  
(Date Certified)

**IN HOME HEALTH CARE MEMORANDUM**

DATE: \_\_\_ / \_\_\_ / \_\_\_

This is a statement of home care services that I \_\_\_\_\_ (caregiver) provide to \_\_\_\_\_ (Veteran / Surviving Spouse) on a monthly basis.

I charge \$ \_\_\_\_\_ per month and began providing these services on \_\_\_ / \_\_\_ / \_\_\_ (date).

- Prepare meals and plan nutritional needs.
- Hands on assist with shower/bathing, personal hygiene and dressing.
- Incontinence of urine and needs assistance for hygiene and assessment of skin.
- Supervision of ambulation for safety, as well as other interventions as needed.
- Basic home up keep to include: making bed, laundry, dishes, etc.
- Transportation to and from: Medical facilities, Dentist's, Grocery store, etc.
- Supervision of medication which includes ordering, controlling and assistance with self-administration.
- Frequent verbal direction and mental stimulation due to diminished mental status.
- Speech/communication of deficiency which inhibits resident's ability to convey needs.
- Within a 24 hour period, Requires on an average of 2 hours of Certified Nursing Aid (CNA) and 30 minutes of Licensed Practical Nurse (LPN) monthly to manage daily activities of living (ADLs).

In Home Health Care Provider

\_\_\_\_\_/\_\_\_\_\_  
 (Printed Name) (Signature)

\_\_\_\_\_/\_\_\_\_\_  
 (Title) (License # if applicable)

Address of provider:

\_\_\_\_\_  
 (Street) Telephone: (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_  
 (City, State, Zip) Fax: (\_\_\_\_) \_\_\_\_\_

Email (Optional): \_\_\_\_\_

Claimant's VA File Number: \_\_\_\_\_ (For Official Use Only)

## 2019 MONTHLY VA PENSION and DIC BENEFIT RATES

### BASIC PENSION (Amounts set by Congress):

SINGLE VETERAN - \$ 1,127.00  
MARRIED VETERAN: - \$ 1,477.00  
SURVIVING SPOUSE: - \$ 756.00

### AID and ATTENDANCE PENSION (Amounts set by Congress):

SINGLE VETERAN - \$1,881.00  
MARRIED VETERAN: - \$2,230.00  
SURVIVING SPOUSE: - \$1,209.00

Net worth limit for Pension benefits is \$127,061

### DEPENDENCY & INDEMNITY COMPENSATION (DIC):

THE BASIC MONTHLY RATE IS: \$1,319.04

Please contact Hillsborough County Veteran Services for  
details: (813) 635-8316