



**DEPARTMENT OF VETERANS AFFAIRS**

Regional Office  
Pension Management Center (335/21P)  
Bishop Henry Whipple Fed. Bldg.  
P O Box 11000  
St. Paul MN 55111-0000

**MAY 25 2012**

In Reply Refer To: 335/21P  
C 25 163 990  
OCONNELL, Anthony M

ANTHONY M OCONNELL  
439 S VISTA DEL RIO  
GREEN VALLEY, AZ 85614

The poverty pension for veterans over 65 living under the poverty line is automatic. No adjudication is required.

Dear Mr. O'Connell:

We made a decision on your claim received January 20, 2012.

This letter tells you about your entitlement amount, payment start date, what we decided, and how we calculated your benefits. It also tells you of your responsibilities as a veteran in receipt of disability pension, what to do if you disagree with our decision, and who to contact if you have questions or need assistance.

**Your Award Amount and Payment Start Date**

Your monthly entitlement amount is shown below:

Monthly Entitlement Amount	Payment Start Date	Reason For Change
\$482.00	Feb 1, 2012	Original Award

We are paying you as a single veteran with no dependents.

**You Can Expect Payment**

Your payment begins the first day of the month following your effective date. You will receive a payment covering the initial amount due under this award, minus any withholdings, in approximately 15 days. Payment will then be made at the beginning of each month for the prior month. For example, benefits due for May are paid on or about June 1.

**What We Decided**

We granted disability pension benefits effective January 20, 2012.



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We enclosed a VA Form 21-8768, "Disability Pension Award Attachment" which explains important factors concerning your benefits.

### How Did We Make Our Decision?

We granted pension benefits because you are:

- Age 65 or older, *or*
- A patient in a nursing home, *or*
- In receipt of disability Social Security benefits.

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### Evidence Used to Decide Your Claim

In making our decision, in addition to the evidence in the attached rating, we used the following evidence:

- VA Form 21-526, Application for Compensation and/or Pension received January 20, 2012
- VA Form 21-4138, Statement in Support of claim, received February 7, 2012
- Information data match with Social Security Administration (SSA)

### What Income And Expenses Did We Use?

We used your total family income as shown below to award your pension benefit from February 1, 2012.

Income We Counted

	Annual Earnings	Annual Social Security	Annual Retirement	Annual Other Sources
Yourself	\$0	\$6,468.00	\$0.00	\$0

On your application, you reported you receive \$523.00 per month in Social Security. A data exchange with the Social Security Administration showed that you received a gross monthly amount of \$839.00 effective December 2011. Therefore, we used that amount to calculate your income for VA purposes effective December 1, 2011. If this is incorrect, please send us a copy of your most recent Social Security benefit statement.

This is not true. This makes me appear as if I tried to deceive someone.  
 2011 SS statement \$6,252.00 per year or \$521 per month  
 2012 SS statement \$6,468.00 per year or \$539.00 per month  
 Please see the SS statements following this letter

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## How Can You Claim Family Medical Expenses?

To claim family medical expenses, complete the enclosed VA Form 21-8416, "Medical Expense Report," and return it to this office *no later than* December 31, 2014. We may consider family medical expenses you paid after January 20, 2012. A few examples are listed below. More examples are shown on the enclosed Medical Expense Report form.

- Medicare/Health Insurance Premiums
- Prescriptions
- Medical/Dental expenses

*Don't include unpaid medical bills, any paid bill that will be reimbursed, or bills that aren't for health expenses.*

## What Are Your Responsibilities?

You are responsible to tell us right away if:

- your income or the income of your dependents changes (e.g., earnings, Social Security benefits, lottery and gambling winnings)
- your net worth increases (e.g., bank accounts, investments, real estate)
- your continuing medical expenses are reduced
- you gain or lose a dependent
- your address or phone number changes

## How Do You Start Direct Deposit?

- Your money may be deposited directly into your checking or savings account. This is the safest and most reliable way to get your money. For more information about Direct Deposit, please call us toll free by dialing 1-877-838-2778.
- The Treasury Department has mandated (31 CFR Part 208) that all Federal benefits be released via electronic funds transfer or Direct Express® Debit MasterCard® issued by Comerica Bank.
- You did not provide us with your banking information to allow your federal benefits to be sent directly to your bank. Although you will receive your initial VA benefit in the form of a paper check, this will only occur for an interim period. You need to contact the Treasury

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Department within 3 months from the date of your first check payment to discuss how to receive future payments at 1-800-333-1795.

- If you choose to continue to receive paper checks you will need to request a waiver from the Treasury Department by calling 1-888-224-2950.
- If you choose to have your federal benefits electronically transferred to your designated financial institution (e.g. bank) please call VA at 1-800-827-1000 with your banking information.
- If you choose to have your federal benefits issued through Direct Express®, which is a MasterCard® issued by Comerica Bank, please call 1-800-333-1795.

### **Are You Entitled to Additional Benefits?**

You should contact your State office of veteran's affairs for information on any tax, license, or fee-related benefits for which you may be eligible as a veteran (or surviving dependent of a veteran). State offices of veteran's affairs are available at <http://www.va.gov/statedva.htm>.

### **What You Should Do If You Disagree With Our Decision**

If you do not agree with our decision, you should write and tell us why. You have *one year from the date of this letter to appeal the decision*. The enclosed *VA Form 4107, "Your Rights to Appeal Our Decision,"* explains your right to appeal.

### **If You Have Questions or Need Assistance**

If you have any questions, you may contact us by telephone, e-mail, or letter.

<b>If you</b>	<b>Here is what to do.</b>
Telephone	Call us at 1-877-294-6380. If you use a Telecommunications Device for the Deaf (TDD), the number is 711.
Use the Internet	Send electronic inquiries through the Internet at <a href="https://iris.va.gov">https://iris.va.gov</a> .
Write	Put your full name and VA file number on the letter. Please send all correspondence to the address at the top of this letter.

In all cases, be sure to refer to your VA file number 25 163 990.

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If you are looking for general information about benefits and eligibility, you should visit our website at <https://www.va.gov>, or search the Frequently Asked Questions (FAQs) at <https://iris.va.gov>.

We sent a copy of this letter to your representative, Arizona Department of Veterans' Services, whom you can also contact if you have questions or need assistance.

Sincerely yours,

T. A. OLSON  
Pension Management Center Manager

Contact us at: <https://iris.va.gov>

Enclosure(s): VA Form 21-8768  
VA Form 21-8416  
VA Form 4107

cc: Arizona Department of Veterans' Services

21P/reg/145

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# FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

# 2011

- PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
- SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name ANTHONY M OCONNELL		Box 2. Beneficiary's Social Security Number
Box 3. Benefits Paid in 2011 \$6,252.00	Box 4. Benefits Repaid to SSA in 2011 NONE	Box 5. Net Benefits for 2011 (Box 3 minus Box 4) \$6,252.00
<b>DESCRIPTION OF AMOUNT IN BOX 3</b> Paid by check or direct deposit \$6,252.00 Benefits for 2011 \$6,252.00		<b>DESCRIPTION OF AMOUNT IN BOX 4</b> NONE
<div style="border: 1px solid red; padding: 5px; color: red;">                     2011 SS statement \$6,252.00 per year or \$521 per month                      2012 SS statement \$6,468.00 per year or \$539.00 per month                 </div>		
Box 6. Voluntary Federal Income Tax Withheld NONE		
Box 7. Address ANTHONY M OCONNELL 439 SOUTH VISTA DEL RIO GREEN VALLEY AZ 85614		
Box 8. Claim Number (Use this number if you need to contact SSA.)		

CU8581731-11A48581983

CU8581731-11A48581983

Form SSA-1099-SM (1-2012)

**DO NOT RETURN THIS FORM TO SSA OR IRS**

SOCIAL SECURITY ADMINISTRATION  
 SOUTHEASTERN PROGRAM SERVICE CENTER  
 1200 REV ABRAHAM WOODS, JR. BLVD  
 BIRMINGHAM AL 35285-0001

OFFICIAL BUSINESS  
 PENALTY FOR PRIVATE USE, \$300

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 M13  
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FIRST-CLASS MAIL  
 PRESORTED  
 POSTAGE AND FEES PAID  
 SOCIAL SECURITY  
 ADMINISTRATION  
 PERMIT NO. G-11

ANTHONY M OCONNELL  
 439 SOUTH VISTA  
 DEL RIO  
 GREEN VALLEY AZ 85614



# FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

# 2012

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 • SEE THE REVERSE FOR MORE INFORMATION.

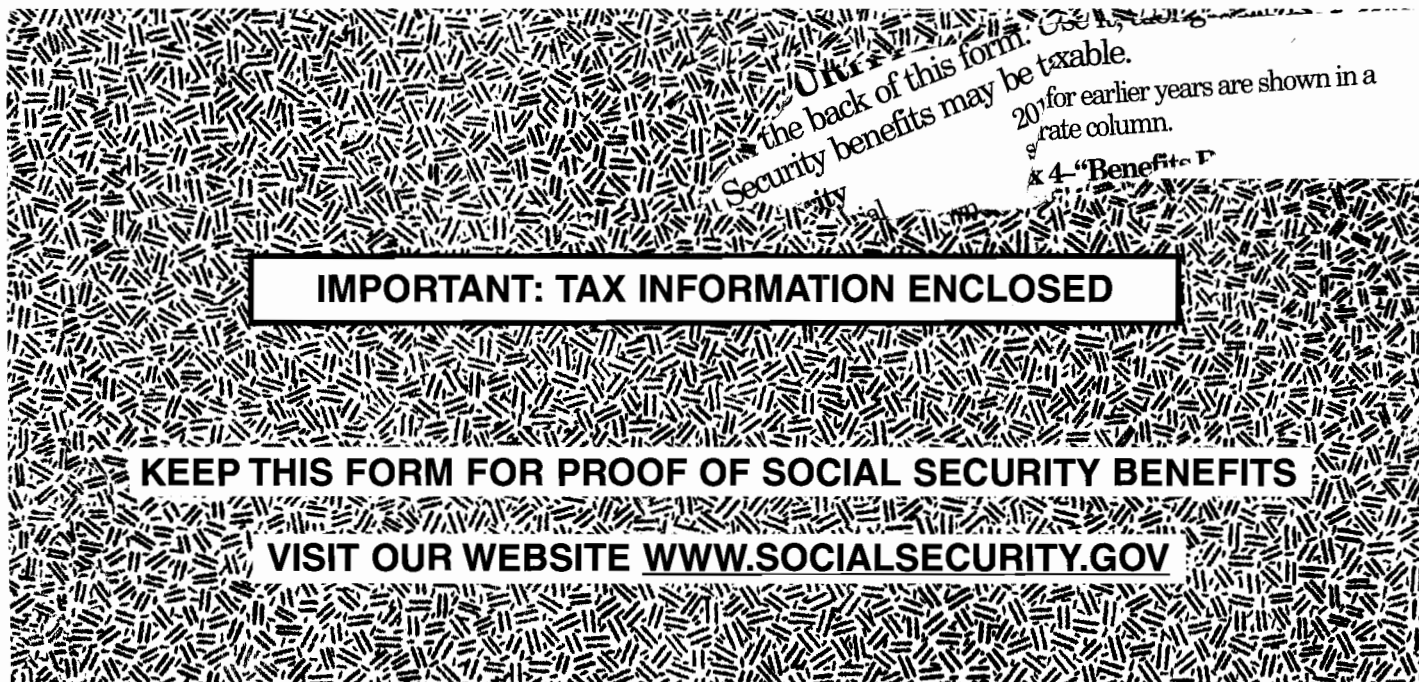
Box 1. Name ANTHONY M OCONNELL		Box 2. Beneficiary's Social Security Number
Box 3. Benefits Paid in 2012 \$6,468.00	Box 4. Benefits Repaid to SSA in 2012 NONE	Box 5. Net Benefits for 2012 (Box 3 minus Box 4) \$6,468.00
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		Box 6. Voluntary Federal Income Tax Withheld  NONE
		Box 7. Address  ANTHONY M OCONNELL 439 SOUTH VISTA DEL RIO GREEN VALLEY AZ 85614
		Box 8. Claim Number (Use this number if you need to contact SSA.)

CU9596247-11A48596419

CU9596247-11A48596419

Form SSA-1099-SM (1-2013)

**DO NOT RETURN THIS FORM TO SSA OR IRS**



On the back of this form, use the "Benefit" box to indicate if your Social Security benefits may be taxable. For earlier years are shown in a separate column.

**IMPORTANT: TAX INFORMATION ENCLOSED**

**KEEP THIS FORM FOR PROOF OF SOCIAL SECURITY BENEFITS**

**VISIT OUR WEBSITE [WWW.SOCIALSECURITY.GOV](http://WWW.SOCIALSECURITY.GOV)**