

**AMENDMENT TO RULES COMM. PRINT 119-33**

**OFFERED BY MR. ROSE OF TENNESSEE**

In title XVII, add at the end the following new sub-  
title:

1 **Subtitle C—Claims Development**  
2 **Support for Veterans With Pen-**  
3 **sion Claims**

4 **SEC. 1731. FINDINGS.**

5 Congress finds the following:

6 (1) Many veterans and surviving spouses who  
7 may be eligible for pension benefits and allowances  
8 for aid and attendance under chapter 15 of title 38,  
9 United States Code, are unaware of such benefits or  
10 encounter significant barriers in determining eligi-  
11 bility.

12 (2) Claims for pension benefits and allowances  
13 for aid and attendance frequently require extensive  
14 medical, financial, caregiving, and long-term care  
15 documentation.

16 (3) Incomplete or insufficiently developed  
17 claims may contribute to delays in adjudication and  
18 may limit timely access to benefits and long-term

1 care services for eligible veterans and surviving  
2 spouses.

3 (4) Organizations with demonstrated expertise  
4 in pension and aid and attendance benefits may as-  
5 sist claimants in developing complete applications  
6 and supporting documentation prior to submission  
7 to the Department of Veterans Affairs.

8 (5) Organizations with extensive demonstrated  
9 experience assisting veterans and surviving spouses  
10 with non-service-connected pension benefits and aid  
11 and attendance claims may possess specialized oper-  
12 ational expertise that can improve claimant con-  
13 tinuity, evidentiary completeness, and access to  
14 earned benefits.

15 (6) Partnerships between the Department of  
16 Veterans Affairs and qualified pension assistance or-  
17 ganizations may improve claimant access to benefits,  
18 enhance claim development, reduce administrative  
19 burdens, and improve program outcomes.

20 (7) Timely access to pension benefits and aid  
21 and attendance allowances may assist eligible vet-  
22 erans and surviving spouses in obtaining necessary  
23 long-term care services and may reduce reliance  
24 upon Medicaid-funded long-term care services and  
25 other public assistance programs.

1           (8) It is in the interest of Congress to evaluate  
2           whether partnerships with qualified pension assist-  
3           ance organizations improve claimant outcomes, in-  
4           crease access to earned benefits, improve administra-  
5           tive efficiency, and reduce reliance on Medicaid-  
6           funded long-term care services.

7   **SEC. 1732. PILOT PROGRAM OF THE SECRETARY OF VET-**  
8                   **ERANS AFFAIRS TO ARRANGE FOR QUALI-**  
9                   **FIED PENSION ASSISTANCE ORGANIZATIONS**  
10                  **TO PROVIDE CLAIMS DEVELOPMENT SUP-**  
11                  **PORT.**

12           (a) **PILOT PROGRAM.**—The Secretary of Veterans Af-  
13           fairs shall carry out a pilot program under which the Sec-  
14           retary enters into contracts or other agreements with one  
15           or more qualified pension assistance organizations to pro-  
16           vide claimant-support services related to—

17           (1) non-service-connected pension benefits  
18           under chapter 15 of title 38, United States Code, in-  
19           cluding increased pension payable by reason of the  
20           need for regular aid and attendance under section  
21           1521(d) of such title; and

22           (2) survivor pension benefits payable by reason  
23           of the need for regular aid and attendance under  
24           section 1541(d) of such title.

1 (b) SUPPORT PROVIDED.—Support provided under  
2 the pilot program shall include—

3 (1) claimant intake and eligibility screening;

4 (2) collection and organization of medical, fi-  
5 nancial, dependency, and long-term care documenta-  
6 tion;

7 (3) evidentiary development and application  
8 preparation;

9 (4) coordination of healthcare, caregiving, and  
10 financial information relevant to claim adjudication;

11 (5) preparation and packaging of application  
12 materials;

13 (6) claimant continuity services during the  
14 claims-development process;

15 (7) claimant follow-up services throughout the  
16 adjudication process;

17 (8) assistance with maintaining Fully Devel-  
18 oped Claim status when applicable; and

19 (9) post-submission claimant support and com-  
20 munication assistance.

21 (c) LOCATIONS.—The Secretary shall select one or  
22 more Veterans Integrated Services Networks in which to  
23 conduct the pilot program.

1 (d) LIMITATION.—The Secretary may limit participa-  
2 tion based on numerical, geographic, categorical, or other  
3 criteria determined appropriate by the Secretary.

4 (e) CONTRACTS OR OTHER AGREEMENTS.—The Sec-  
5 retary shall seek to enter into one or more contracts or  
6 other agreements with qualified pension assistance organi-  
7 zations for purposes of carrying out this section.

8 (f) QUALIFICATION REQUIREMENTS.—To participate  
9 in the pilot program, an organization shall meet the re-  
10 quirements specified in subsection (j).

11 (g) PROTECTIONS.—The Secretary shall ensure that  
12 participating organizations maintain safeguards necessary  
13 to—

14 (1) protect claimant information;

15 (2) prevent fraud, waste, and abuse;

16 (3) ensure compliance with Federal privacy laws  
17 and regulations;

18 (4) ensure compliance with section 5904 of title  
19 38, United States Code; and

20 (5) protect veterans and surviving spouses from  
21 inappropriate financial arrangements or conflicts of  
22 interest.

23 (h) SUNSET.—The authority under this section shall  
24 terminate on December 31, 2031.

1 (i) PREFERENCE.—In selecting participating organi-  
2 zations, the Secretary shall give preference to organiza-  
3 tions with substantial demonstrated experience assisting  
4 veterans and surviving spouses in obtaining non-service-  
5 connected pension benefits and aid and attendance bene-  
6 fits on a nationwide basis.

7 (j) QUALIFIED PENSION ASSISTANCE ORGANIZATION  
8 DEFINED.—In this section, the term “qualified pension  
9 assistance organization” means an organization that pro-  
10 vides nationwide administrative and claimant-support  
11 services exclusively related to Department of Veterans Af-  
12 fairs non-service-connected pension benefits, including  
13 pension with aid and attendance, and that—

14 (1) has maintained continuous operations for  
15 not fewer than five years primarily dedicated to as-  
16 sisting veterans and surviving spouses with pension  
17 benefit eligibility determinations and claim develop-  
18 ment;

19 (2) has documented not fewer than 10,000  
20 verifiable approvals of Department of Veterans Af-  
21 fairs non-service-connected pension claims, including  
22 pension with aid and attendance and survivor pen-  
23 sion claims;

1           (3) demonstrates the operational capacity to  
2           serve not fewer than 300 claimants per month on a  
3           nationwide basis;

4           (4) maintains a dedicated national infrastruc-  
5           ture for claimant intake, case management, evi-  
6           dentiary development, application support, and  
7           claimant continuity services;

8           (5) does not engage in the sale, marketing, re-  
9           ferral, or receipt of compensation related to financial  
10          products, annuities, insurance products, investment  
11          products, trusts, asset-transfer strategies, or Med-  
12          icaid planning products;

13          (6) does not charge any fee to a claimant for  
14          preparing, presenting, or prosecuting a claim for  
15          benefits under laws administered by the Secretary;

16          (7) is accredited by the Department of Veterans  
17          Affairs, or operates under the direct supervision of  
18          a Department-accredited attorney or claims agent;

19          (8) has demonstrated specialized experience as-  
20          sisting veterans and surviving spouses with non-serv-  
21          ice-connected pension claims on a nationwide basis  
22          and has maintained a documented approval history  
23          and claimant-support infrastructure sufficient to  
24          support large-scale pension claims development oper-  
25          ations;

1           (9) has never, and no affiliated organization, of-  
2           ficer, employee, contractor, or agent has ever, di-  
3           rectly or indirectly—

4                   (A) been granted signatory authority over,  
5           joint ownership of, or access to a claimant's  
6           bank account, financial account, or other finan-  
7           cial assets; or

8                   (B) acquired, accepted, held, or been  
9           granted any ownership interest, lien, mortgage,  
10          deed, title interest, power of attorney, or other  
11          legal or equitable interest in a claimant's pri-  
12          mary residence or real property; and

13          (10) maintains auditable records sufficient to  
14          verify compliance with the requirements of this sub-  
15          section.

16 **SEC. 1733. PERFORMANCE MEASUREMENT AND PROGRAM**  
17 **EVALUATION.**

18          (a) DATA COLLECTION.—The Secretary shall estab-  
19          lish a performance measurement framework to evaluate  
20          whether the pilot program improves claimant outcomes,  
21          administrative efficiency, and access to long-term care  
22          services for veterans and surviving spouses applying for  
23          non-service-connected pension benefits, including aid and  
24          attendance.

1 (b) REQUIRED PERFORMANCE MEASURES.—The  
2 Secretary shall collect and evaluate, at a minimum—

3 (1) the number of claimants participating in the  
4 pilot program;

5 (2) the percentage of claims initially submitted  
6 as Fully Developed Claims;

7 (3) the percentage of claims that remain in  
8 Fully Developed Claim status through final adju-  
9 dication;

10 (4) the rate of incomplete, deficient, or adminis-  
11 tratively rejected submissions compared to similar  
12 claims processed outside the pilot program;

13 (5) the number and frequency of requests for  
14 additional evidence or development actions following  
15 submission;

16 (6) measures of evidentiary completeness, in-  
17 cluding the presence of required financial, medical,  
18 dependency, and long-term care documentation at  
19 initial submission;

20 (7) average claim processing times from sub-  
21 mission to final decision compared to non-pilot  
22 claims;

23 (8) claimant continuity measures, including  
24 claimant retention and successful completion of the  
25 claims-development process;

1           (9) approval rates for claims processed through  
2           the pilot compared to similarly situated claims pro-  
3           cessed outside the pilot;

4           (10) claimant access to home care, assisted liv-  
5           ing, nursing facility care, or other long-term care  
6           services following receipt of benefits;

7           (11) the extent to which receipt of pension ben-  
8           efits through the pilot reduced, delayed, or avoided  
9           reliance on Medicaid-funded long-term care services;

10          (12) claimant satisfaction and program accessi-  
11          bility measures; and

12          (13) any additional measures the Secretary de-  
13          termines necessary to evaluate operational effective-  
14          ness and scalability.

15          (c) COMPARATIVE ANALYSIS.—The Secretary shall  
16          compare pilot-program performance against substantially  
17          similar non-pilot pension claims to determine whether the  
18          pilot improves—

19                 (1) claim quality;

20                 (2) evidentiary completeness;

21                 (3) claimant outcomes;

22                 (4) administrative efficiency;

23                 (5) Fully Developed Claim retention rates;

24                 (6) access to long-term care services; and

1           (7) reductions in Medicaid-funded long-term  
2           care utilization.

3           (d) REPORT TO CONGRESS.—Not later than 180 days  
4 after completion of the pilot program, the Secretary shall  
5 submit a report to the Committees on Veterans' Affairs  
6 of the House of Representatives and the Senate con-  
7 taining—

8           (1) all performance data collected under this  
9           section;

10           (2) an assessment of whether the pilot improved  
11 Fully Developed Claim retention, evidentiary com-  
12 pleteness, claimant continuity, approval outcomes,  
13 and adjudication timelines;

14           (3) an assessment of reductions in Medicaid-  
15 funded long-term care expenditures attributable to  
16 benefits obtained through the pilot;

17           (4) recommendations regarding expansion, con-  
18 tinuation, modification, or termination of the pilot;  
19 and

20           (5) an assessment of the feasibility of expand-  
21 ing the pilot to additional jurisdictions or imple-  
22 menting the model on a nationwide basis.

