SHARE (SSA/FOLQ)

Instructor Lesson Plan

Time Required: 1.75 Hours

**Table of Contents**

[Lesson Description 2](#_Toc442874365)

[Introduction to SHARE (SSA/FOLQ) 4](#_Toc442874366)

[Topic 1: Federal On-Line Query (FOLQ) 6](#_Toc442874367)

[Topic 2: SSA Inquiry 7](#_Toc442874368)

[Topic 3: SHARE SSA Inquiry Screens 8](#_Toc442874369)

[Practical Exercise 10](#_Toc442874370)

[Lesson Review, Assessment, and Wrap-up 11](#_Toc442874371)

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 1197930 |
| Prerequisites | None |
| target audience | The target audience for SHARE (SSA/FOLQ) is Entry Level VSRs/Insurance Specialists and Tecnicians.  Although this lesson is targeted to teach Entry Level VSRs/Insurance Specialists and Tecnicians, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.75 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * SHARE (SSA/FOLQ) PowerPoint Presentation * SHARE (SSA/FOLQ) Trainee Handouts * FOLQ User Guide * SHARE User Guide * SHARE User Authorization |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| Introduction to SHARE (SSA/FOLQ) | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| Purpose of Lesson  Explain the following: | | This lesson is intended to inform Veterans Services Representatives (VSRs) and Insurance Specialists and Technicians how to obtain necessary Social Security Administration (SSA) information in order to process a claim. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * The Federal On-Line Query (FOLQ) * SSA Inquiry Command * SHARE SSA Inquiry Screens |
| Lesson Objectives  Discuss the following:  Slide 2  Handout p2 | To accomplish the purpose of this lesson, the VSR or Insurance Specialists and Technicians will be required to accomplish the following lesson objectives.  TheVSR or Insurance Specialists and Technicians will be able to:   * recognize what the SHARE-SSA/Federal On-Line Query (FOLQ) program is and who has access to it, * perform the inquiry function of the SHARE-SSA/FOLQ program, * apply the information from each SHARE-SSA/FOLQ response screen in order to perform job-related tasks, and * interpret SHARE-SSA/FOLQ messages. | |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed. | |
| Motivation | To process certain claims more quickly, it is important to be able to use and understand the real-time interface with SSA for the most current information available. | |
| STAR Error code(s) | TBD | |

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| References  Slide 3  Handout p3 | Explain these references (all M21-1 references are found in the [Live Manual Website](https://vaww.compensation.pension.km.va.gov/)).   * M21-1 Part III, Subpart iii, 3.A.3 – Obtaining Information Through Federal On-Line Query (FOLQ) * M21-1 Part III, Subpart iii, 3.A.4 – VA Requests for Verification of SSA Monthly Payments * SHARE User Guide * SSA Federal On-Line Query (FOLQ) System User Guide |

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| Topic 1: Federal On-Line Query (FOLQ) | |
| Introduction | This topic will assist the trainee in understanding what FOLQ is, how to access it, and who is authorized to acces it. |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Recognize what the SHARE-SSA/Federal On-Line Query (FOLQ) program is and who has access to it   The following topic teaching points support the topic objectives:   * What is FOLQ * Accessing FOLQ |
| *What is FOLQ?*  Slide 4  Handout p4 | FOLQ is a read-only, person-specific, real-time query developed by the SSA. It provides the most updated information regarding any benefits a Veteran or claimant may be receiving from the SSA.  Discuss the SSA data that is provided during an SSA/FOLQ Inquiry.  Acces to FOLQ will enable VBA to assist Veterans and dependents by providing instant verification of the information on applications and post-entitlement reviews. |
| *Accessing FOLQ*  Slide 5-6  Handout p4-6 | Discuss the SHARE User Guide and the FOLQ User Guide, as well as the following:   * How to access FOLQ (SSA Inquiry command in SHARE * Information provided by FOLQ * Who is authorized to access FOLQ * FOLQ restrictions for users * Personal Statement of Agreement/Certificate of Understanding * Security System |

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| Topic 2: SSA Inquiry | |
| Introduction | This topic will assist the trainee in understanding the information provided by the FOLQ using the SHARE SSA Inquiry command and what information is needed in order to make an inquiry. Additionally, it discusses combined payments of SSA benefits. |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Perform the inquiry function of the SHARE-SSA/FOLQ program   The following topic teaching points support the topic objectives:   * Using the SSA Command in SHARE * Combined SSA Payment to a Veteran and Spouse * Combined SSA Payments to a Surviving Spouse and Child(ren) |
| *Using the SSA Inquiry Command in SHARE*  Slide 7  Handout p6 | Discuss for whom the SSA Inquiry verifies monthly SSA benefits.  Discuss the types of information that the SSA Inquiry command requires for processing. |
| *Combined SSA Payment to a Veteran and Spouse & Combined SSA Payment to a Surviving Spouse and Child(ren)*  Handout p6 & 7 | Discuss how, in some situations, the SSA payments to a Veteran and his or her spouse, or a surviving spouse and child(ren) may be combined. |

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| Topic 3: SHARE SSA Inquiry Screens | |
| Introduction | This topic will assist the trainee in understanding each of the SSA Inquiry response screens, to include an explanation of the information on each screen and what the each screen looks like. |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Apply the information of each SHARE-SSA/FOLQ response screen to perform job-related tasks * Interpret SHARE-SSA/FOLQ messages   The following topic teaching points support the topic objectives:   * SSA Inquiry Tab * Response Screen – Profile * Response Screen – SSA Basic Info * Response Screen – Income History * Response Screen – SSI Basic Info |
| *SSA Inquiry Command*  Slide 8  Handout p7 & 8 | Social Security Inquiry may be submitted to verify a person's SSN, personal information, Veteran's death, or benefits. FOLQ Federal On Line Query enables VBA to assist Veterans and dependents by providing instant verification of the information on applications and post-entitlement reviews. This helps reduce processing time and increases the accuracy of information.  *Note: To submit inquiries for dependents, the relationship must already be established in the Veteran’s profile (SHARE and/or VBMS).* |
| *Response Screen – Profile*  Slide 9  Handout p9 | This screen displays the Veteran/claimants’s vital information (verified SSN, address, dates of birth and death). This is the first screen displayed after a ***successful*** SSA inquiry. Unsuccessful inquiries will result in an SSA message. Descriptions of each message can be found in the FOLQ User Guide. |

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| *Response Screen – SSA Basic Info*  Slide 10  Handout p10 | Explain that the SSA Basic Info screen displays the Veteran/claimant’s payment amounts, dates and account numbers, and related information. The Basic Info screen is the second screen displayed after a successful SSA inquiry.  Explain the Monthly Benefit Credited and the SMI Option Codes. Stress the importance of recognizing if/when the SMI Buy-In Option Code field has a code. |
| *Response Screen – Income History*  Slide 11  Handout p11 | The Income History screen displays the Veteran/claimant’s unearned income. It provides information about the Veteran’s income type, amount, start and end dates, Federal Countable Income (FCI), and earned amount. |
| *Response Screen – SSI Basic Info*  Slide 12  Handout p12 | This screen will show if the beneficiary is receiving SSI benefits. SSI benefits do not affect NSC Pension, as this is benefit is public assistance. These are unearned incomes and gross payable amounts. |
| DEMONSTRATION | Open the SHARE application and demonstrate how to use the SSA Inquiry command and the show the different screens. |
| Regional Office Specific Topics | At this time add any information pertaining to:   * Station quality issues with this lesson * Additional State specific programs/guidance on this lesson |

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| Practical Exercise | |
| EXERCISE | The practical exercise is located in the trainee handout. Allow 10 minutes for trainees to complete the exercise.  Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
| *Practical Exercise*  Slide 16  Handout p 13 | See answer key. |

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| Lesson Review, Assessment, and Wrap-up | |
| Introduction  Discuss the following: | The SSA (SHARE/FOLQ) lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. |
| Lesson Objectives | You have completed the SSA (SHARE/FOLQ) lesson.  The trainee should be able to:   * Recognize what the SHARE-SSA/Federal On-Line Query (FOLQ) program is and who has access to it * Perform the inquiry function of the SHARE-SSA/FOLQ program * Apply the information of each SHARE-SSA/FOLQ response screen to perform job-related tasks * Interpret SHARE-SSA/FOLQ messages |
| Assessment | Remind the trainees to complete the online assessment in TMS to receive credit for completion of the course.  The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. |