CONSOLIDATION OF DUPLICATE RECORDS INSTRUCTOR LESSON PLAN

**TIME REQUIRED: 1.5 HOURS**

**Table of Contents**

[Lesson Description 2](#_bookmark0)

[Consolidation of Duplicate Records 4](#_bookmark1)

[Topic 1: Definition and Prevention of Duplicate Records 5](#_bookmark2)

[Topic 2: How to Correct Duplicate Corporate Records 5](#_bookmark3)

[Lesson Review and Wrap-up 8](#_bookmark4)

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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 #** | 3948955 |
| **PREREQUISITES** | None |
| **TARGET AUDIENCE** | VSRs assigned DUPC functions and IPC Supervisor or Designee. |
| **TIME REQUIRED** | 1.5 hour |
| **MATERIALS/ TRAINING AIDS** | * *Consolidation of Duplicate Records Power Point* * Consolidation of Duplicate Records Trainee Handout * Access to M21-1 III.ii.4.E – Consolidation of Duplicate Beneficiary Identification and Records Locator Subsystem (BIRLS) |
| **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 * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material |
| **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 |

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| 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. * Provide a sign in sheet and at the conclusion of the session, ensure that all trainees sign in. |

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| **CONSOLIDATION OF DUPLICATE RECORDS** | |
| **INSTRUCTOR INTRODUCTION** | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| **TIME REQUIRED** | .25 hours |
| **PURPOSE OF LESSON** | The purpose of this lesson is to define what a duplicate record is and explain how to prevent and correct duplicate records within VA Systems. |
| **LESSON OBJECTIVES**  *Discuss the following: Slide 2* | In order to accomplish the purpose of this lesson, the VSR will be required to accomplish the following lesson objectives.  The VSR will be able to:   * Define what a duplicate record is within VA. * Identify how to prevent the duplication of records. * Explain how to correct duplicate records within VA systems. |
| *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** | In order to process awards more accurately, it is important to make sure duplicate corporate records are not created. Duplicate records can cause financial hardship to the beneficiary and cause an overpayment. |
| **STAR ERROR CODE(S)** | TBD |
| **REFERENCES**  *Slide 3 Handout p.2* | Explain where these references are located in the workplace.   * **M21-1 III.ii.4.E – Consolidation of Duplicate Beneficiary Identification and Records Locator Subsystem (BIRLS) Records and Corporate Records** * **SHARE User Guide** |

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| **TOPIC 1: DEFINITION AND PREVENTION OF DUPLICATE RECORDS** | |
| **INTRODUCTION** | Introduce yourself and inform participants of the lesson topic. This lesson will define duplicate records in the VA systems used to verify the corporate system. |
| **TIME REQUIRED** | .5 hour |
| **OBJECTIVES/ TEACHING POINTS** | Topic objectives:   * Definition of duplicate records. * Appropriate steps to ensure prevention of duplicate records. |
| *Definition of Duplicate Records*  *Slide 4*  *Preventing Duplicate Corporate Records*  *Slide 5,6* | Discuss what a duplicate record is and give an example of a duplicate record. Explain that this happens when multiple PID records exist on the PID corporate system.  Advise the trainee of the importance of the PID label and how it is unique to each corporate record. A throughout review needs to be completed before an additional record is added into an existing record.  Refer to the M21-1 III.ii.4.E.2. (follow link to Preventing duplication of records) [Preventing Duplicate Records](http://vbaw.vba.va.gov/bl/21/systems/docs/Preventing_Duplication_of_Records.doc) |
| **TOPIC 2: HOW TO CORRECT DUPLICATE CORPORATE RECORDS** | |
| **INTRODUCTION** | Discuss the steps to take when correction of Corporate Records are required. |

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| **TIME REQUIRED** | .5 hours |
| **OBJECTIVES/ TEACHING POINTS** | Topic objectives:  Explain to trainees we will discuss correction of errors created by the creation of duplicate corporate records.  The following topic teaching points support the topic objectives:   * Responsibilities of the IPC supervisor or designee * Processing a DUPC Transaction * Procedure for Consolidation of Records |
| *Correcting Duplicate Corporate Records Slide 7,8*  *Handout p.3-6* | Note: the IPC Coach or designee is responsible for DUPC actions that must be completed prior to the submission of a corporate trouble ticket.  Pull up the chart provided in M21-1 III.ii.4.E.3.b. for guidance on processing a DUPC Transaction for BIRLS Consolidation  Reference the information located in M21-1 III.ii.4.E.5.a. Responsibilities of IPC Coach and/or Designee in the Record Consolidation Process |
| *Records that are Not Consolidated During BIRLS Transaction Processing*  *Slide 9*  *Handout p. 3-6* | Consolidation processing in BIRLS does not consolidate master corporate records in Benefits Delivery Network (BDN).  Because BIRLS consolidation processing does not consolidate the BDN record, the DUPC process must be completed in BDN. |
| *DUPC Process (BDN) Slide 10* | Review with the trainees the steps to ensure the corporate record is merged correctly.  Do not complete the BIRLS record consolidation until the award action to terminate one of the corporate records has been authorized. More information can be found in M21-1 III.ii.4.E.3.b. |

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| *Consolidation of Corporate Records*  *Slide 11-12 Handout p.6-11*  *Corporate Record Deactivation*  *Slide 13* | Introduce the different types of record consolidation. Data Architecture (DA) completes the final consolidation of corporate records.  Contact information for DA: the Awards Super User or designee should contact the 215 Mailbox ([215A.VBACO@va.gov](mailto:215A.VBACO@va.gov)).  Data Architecture is responsible for taking action on corporate record merges.  Prepare and update the trouble ticket spreadsheet in the Business Management Staff SharePoint  When Data Architecture (DA) completes a Corporate Record Deactivation, the name and all identifying numbers will be removed from the record.  Only the PID will remain attached to the record. |

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| **LESSON REVIEW AND WRAP-UP** | |
| **INTRODUCTION**  *Discuss the following:* | The Consolidation of Duplicate Records is complete.  Review each lesson objective and ask the trainees for any questions or comments. |
| **TIME REQUIRED** | .25 hours |
| **LESSON OBJECTIVES** | You have completed the Consolidation of Duplicate Records lesson. The trainee should be able to:   * Define what a duplicate record is within VA * Identify how to prevent the duplication of records * Explain how to correct duplicate records within VA systems |