Pension and fiduciary service

PMC VSR Core Course
Phase 3: PMC VSR Resources

Lesson 3: References

Trainee Guide

December 2019

References

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 1 hour |
| Purpose of the Lesson: | This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to prepare you to locate and use common VA references. |
| Prerequisite Training Requirements: | Prior to taking the References lesson, you must complete PMC VSR Core Course Phases 1 and 2, as well as the following Phase 3 lessons:1: VA Terminology2: VBA Intranet Resources for the PMC VSR  |
| Target Audience: | This lesson is for entry-level PMC VSRs. |
| Lesson References: | * **Common VA References** job aid, located in the VSR Assistant from the PMC VSR button
* **Master Course Map** learning aid
* CPKM website
* Pension homepage
* M21-1 (Adjudication Procedures Manual)
* M21-4 (Manpower Control and Utilization in Adjudication Divisions Manual)
* M27-1 (Benefits Assistance Service Procedures)
* e-CFR website
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| Knowledge Check: | * Phase 3: PMC VSR Resources Knowledge Check
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| Technical Competencies: | * Program benefits and eligibility (PMC VSR)
* VBA applications (PMC VSR)
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| Lesson Objectives: | * Identify the most commonly used references by PMC VSRs.
* Describe the purpose and applicability of the different types of references.
* Describe the elements of each reference.
* Locate the appropriate reference.
* Navigate to the CPKM portal
* Know how to subscribe to the manual updates email
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| What You Need: | * Trainee Guide
* Appendix A: References worksheet
* Access to VBA intranet
* Access to the **Common VA References** job aid, located in the VSR Assistant from the PMC VSR button
* **Master Course Map** learning aid
* Access to the Compensation and Pension website
* Access to the Pension and Fiduciary website
* Access to CPKM
* Access to the e-CFR website
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| PowerPoint Slides | Notes |
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| **Lesson 3: References** |  |
| **Why Are References Important?*** References, when used properly, can:
	+ Improve quality of work
	+ Increase timeliness
	+ Provide job satisfaction
	+ Reduce stress
	+ Provide promotion potential
	+ Help Veterans
	+ Substantiate administrative decisions and determinations that affect a Veteran’s case
 |  |
| **Technical Competencies*** Program benefits and eligibility (PMC VSR)
* VBA applications (PMC VSR)
 |  |
| **Lesson Objectives*** Describe the most commonly used references by PMC VSRs.
* Describe the purpose and applicability of the different types of references.
* Describe the elements of each reference.
* Locate the appropriate reference.
 |  |
| **Precedence of VBA Laws, Regulations, and Procedures**The is a flowchart with 4 rectangular boxes, from top to bottom: Constitution, U.S. Code, 38 CFR, and Manual. |  |
| **Most Commonly Used References for PMC VSRs*** 38 CFR Title 38 USC
* M21-1 Compensation and Pension Materials, Adjudication Procedures Manual
* M21-4 Manpower Control and Utilization in Adjudication Divisions
* M27-1 Benefits Assistance Materials
* VBA Letters
* Job aids, located in the VSR Assistant from the PMC VSR button
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| **How to Access References*** Compensation and Pension Knowledge Management (CPKM)
* Pension and Fiduciary homepage
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| **VA and Title 38 USC*** Chapter 1 of Title 38 of the United States Code (USC) of Federal regulations (CFR) governs the administration of Veterans benefits.
* This reference is used by federal agencies of the United States regarding pensions, bonuses, and Veterans’ relief.
* VSRs work primarily in Part 3 of 38 CFR.
* Available online through the [Code of Federal Regulations (e-CFR) website](http://www.ecfr.gov/cgi-bin/ECFR?page=browse) and through the publications website.
* Organized in numerical order from the first regulation (3.1) to the two thousand six hundredth regulation (3.2600).
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| **M21-1 Adjudication Procedures Manual*** The M21-1 is an interpretation of CFRs
* Also known as “The Manual”
* Consists of the following parts:
	+ Part 1. Claimants’ Rights and Responsibilities
	+ Part 3. General Claims Process
	+ Part 4. Compensation, DIC, and Death Compensation Benefits
	+ Part 5. Pension and Parents’ Dependency and Indemnity Compensation (DIC)
	+ Part 6. Chapter 18 Benefits
	+ Part 7. Burial Benefits
	+ Part 8. Accrued Benefits
	+ Part 9. Ancillary and Special Benefits
	+ Part 10. Matching Programs
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| **M21-4 Manual*** Provides a logistical overview of how the stations function
* Consists of the following parts:
	+ Chapter 1. Overview
	+ Chapter 2. Workflow Management
	+ Chapter 3. National Quality Reviews
	+ Chapter 4. Claims and Appeals Processing Timeliness
	+ Chapter 5. Systematic Analyses of Operations (SAO)
	+ Chapter 6. Quality Review Team
	+ Chapter 7. PMC National Quality and QRT
	+ Chapter 8. Fiduciary Hub (Hub) National Quality Reviews and Quality Review Teams (QRT)
	+ Appendix A. Glossary of Terms and Definitions
	+ Appendix B. End Product Codes and Work-Rate Standards for Quantitative Measurements
	+ Appendix C. Index of Claim Attributes
	+ Appendix D. Index of Claim Stage Indicators
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| **M27-1 Benefits Assistance Service Procedures*** **Manual used primarily by public contact and outreach employees to help them provide timely and accurate benefit information and services to Servicemembers, Veterans, dependents, and survivors**
* **Consists of the following parts:**
	+ **Part I. VBA Public Contact and Direct Services**
	+ **Part II. VBA Outreach**
	+ **Part III. VBA Web Communications**
	+ **Part IV. Quality and Training**
	+ **Part V. Access and Business Applications**
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| **VBA Letters*** **Can be found under the “VBA Letters” section of the Publications Index**
* **Written from the office of the Undersecretary for Benefits**
* **Cover a range of topics from benefit processing instructions to information about leadership programs**
* **Communicated via upper management**
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| **Other PMC VSR References*** AMA FAQs
* P&F Service Inquiries
* Job aids
	+ Can be provided by management or peers, or created by you
* VSR Assistant EPSS
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| **VBA References Review Exercise*** Instructions:
	+ Complete the Appendix A: References worksheet
	+ Access the **Common VA References** job aid, located in the VSR Assistant from the PMC VSR button
	+ Navigate to CPKM to access the references in the job aid
	+ Answer the questions in the worksheet using the references
	+ Submit answers to another trainee
* Time allowed: 15 minutes
 |  |
| **VBA References Review Exercise Answers** |  |
| **Lesson Summary*** Knowing what references are available and how to use them are essential in performing tasks and duties on the job.
* Remember, references are important because they:
	+ Improve quality of work
	+ Increase timeliness
	+ Provide job satisfaction
	+ Reduce stress
	+ Provide promotion potential
	+ Help Veterans
	+ Substantiate administrative decisions and determinations that affect a Veteran’s case
 |  |
| **Questions?**This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. |  |
| **What’s Next**TMS Evaluation TMS #4189331 References |  |