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 Terminology  2: 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 |
| Knowledge Check: | * Phase 3: PMC VSR Resources Knowledge Check |
| Technical Competencies: | * Program benefits and eligibility (PMC VSR) * VBA applications (PMC VSR) |
| 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 |
| 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 |

| PowerPoint Slides | Notes |
| --- | --- |
| **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 |  |
| **How to Access References**   * Compensation and Pension Knowledge Management (CPKM) * Pension and Fiduciary homepage |  |
| **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). |  |
| **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 |  |
| **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 |  |
| **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** |  |
| **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** |  |
| **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 |  |
| **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 |  |