

# Pension and Fiduciary Service Instructor-led Training Guide

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<b>Lesson Title</b>	Closing Field Examinations
<b>TMS Item Number</b>	VA 4219737
<b>Learning Hours</b>	4.0
<b>Target Audience</b>	Legal Instruments Examiners

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## Lesson Description

This course teaches students how to review field examinations and supporting documentation for completeness and accuracy, how to update Beneficiary Fiduciary Field System (BFFS) record to schedule future control, and how to select and close work items within BFFS.

## Lesson Objectives

By the end of this lesson, the learner will be able to:

- Review a field examination for completeness
- Certify a fiduciary appointment in BFFS
- Input and authorize a fiduciary fee in BFFS
- Finalize correspondence and documentation
- Upload documents to eFolder
- Update BFFS beneficiary record and schedule future control
- Explain requirements for a properly titled account
- Update corporate record and process change of fiduciary command (CFID)
- Select and close a work item (WI) in BFFS

## Lesson References

- FPM 2.B.1.b, *Content Requirements for Requests*
- FPM 2.D.4.m, *Determining a Fiduciary for a Beneficiary with a Previously Established Court Appointment*
- FPM 2.D.7, *Authorizing Fees for Fiduciaries*
- FPM 2.D.9, *Follow-up Actions for Adult Beneficiaries*
- FPM 2.I, *Field Examination Documentation*
- FPM 3.B.1, *When a Fiduciary Must Account*
- FPM 3.D.5.b, *Verification of Accounts, and Funds Under Management*
- FPG, *Field Examination Submission*
- FPG, *Field Examination Analysis*
- FPG, *Fiduciary Appointment and Fiduciary Fee Approval and Review*
- FPG, *Creating Letters and Forms from FELux*
- FPG, *Beneficiary Record*
- FPG, *Fiduciary Record Management*
- FPG, *BFFS Tasks*
- Share User Guide
- VBMS User Guide



## Materials and Aids

Lesson materials available in the [VBA Learning Catalog](#):

- Closing Field Examinations PowerPoint
- Closing Field Examinations Instructor Guide

## Training Area and 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
- The various FPG articles, user guides, and enough field examination casework to utilize for demonstration and practical exercises
- Computer with BFFS, VBMS, Share access, and PowerPoint software to present the lesson material

Trainees require access to the following tools:

- VA [Talent Management System \(TMS\)](#) to complete the assessment and survey
- Pension and Fiduciary Service – [Fiduciary Knowledge Management Site](#)
- Beneficiary Fiduciary Field System - <https://internalcrm.crm15.xrm.va.gov/BFFS/>
- Beneficiary eFolder
- Share and VBMS

## Pre-Planning

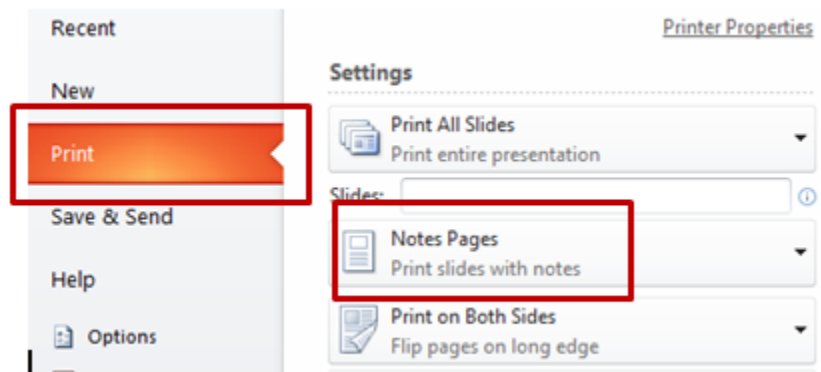
- Become familiar with all training materials by reading the Instructor-led Training Guide and PowerPoint slides (including the instructor speaking notes in the notes area below each slide). Preparation will provide you the opportunity to see the connection between all lesson materials, which will allow for a more structured presentation during the training session.
- Become familiar with the content of the various references, FPG articles, and guides listed in this guide and their association to the presentation.
- Locate either prior completed field examinations or field examinations ready to finalize to use during the demonstration and practical exercises.
- Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between the lesson materials, demonstration, and to ensure your timing is on track with the length of the lesson.



- ❑ Make appropriate training room reservations and accommodations.
- ❑ Ensure the instructor computer and overhead projector work properly.
- ❑ 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.

## Printing PowerPoint Instructor Notes

In preparation for the training, print the PowerPoint to include the instructor notes. In PowerPoint, select the following: **File > Print > Notes Page**. Also, select **Print on Both Sides** if your printer allows it to save paper.



## 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 the instructor has login access to any other necessary programs and VBA systems for any demonstration(s).
- ❑ The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. Forward the attendance record to the Regional Office Training Manager when complete.



## Survey and Assessment

Remind the trainees to complete the assessment and survey in TMS to receive credit for completion of the course. The assessment allows the participants to demonstrate their understanding of the information presented in this lesson and the survey provides Pension and Fiduciary Service with feedback and satisfaction on the lesson.

## Questions and Comments

Please contact the Pension and Fiduciary Service – Fiduciary Training Staff with any questions or comments on this Instructor-led Training Guide or the other materials associated with the lesson at [FFE.VBACO@va.gov](mailto:FFE.VBACO@va.gov).

