Pension and Fiduciary Service Instructor-led Training Guide

Lesson Title	Field Examiner Mentorship
TMS Item Number	VA 4407125
Learning Hours	3.0
Target Audience	Field Examiners

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Lesson Description

The purpose of this lesson is to provide learners with an interactive question and answer session involving experienced field examiners (FEs) and the experiences they have had throughout their FE career. Discussion will concentrate on FE safety while conducting field work and provide scenarios to highlight the importance of customer service, communication skills, proper preparation, and situational awareness. Each of the slides are to be used as speaking points and as prompts to promote conversation detailing a potentially volatile situation, action taken by the FE, and the outcome.

NOTE: Information contained in this presentation is NOT dictated by the manual, unless noted otherwise.

Lesson Objectives

At the end of this lesson, given the discussion and corresponding references, the learner will be able to do the following:

- Comprehend dimensions of customer service
- Explain customer service techniques and communication styles
- Identify red flags during case preparation
- Address personal preparation
- Recognize how to prepare equipment
- Discuss appropriate vehicle preparation
- Discuss personal safety strategies

Lesson References

- FPM I.2.B.1, *Reviewing Beneficiary Information Prior to the Field Exam*
- Local Field Examiners (FEs) with more than one year of experience

Materials and Aids

Lesson materials available in the VBA Learning Catalog:

- Field Examiner Mentorship PowerPoint Presentation
- Field Examiner Mentorship Instructor-led Training 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

- Access to FEs with more than one year of experience
- Computer with VA intranet access and PowerPoint software to present the lesson material

Trainees require access to the following tools:

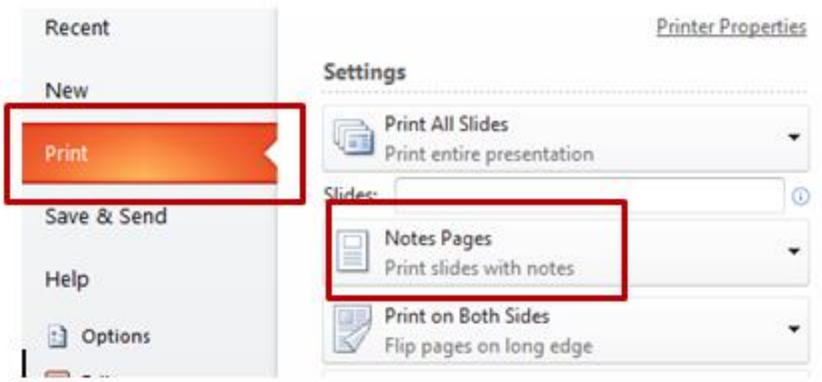
- VA Talent Management System (TMS) to complete the assessment and survey
- Pension and Fiduciary Service – Fiduciary Knowledge Management Site
- Access to experienced FEs for interactive discussions

Pre-Planning

- ☐ Become familiar with all training materials by reading the Instructor-led Training Guide and the PowerPoint slides (including the instructor speaking notes in the notes area below each slide) ahead of time. 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.
- ☐ Locate and prepare any live casework that can be utilized for demonstration and for student practice in the classroom for on-the-job training.
- ☐ Identify, notify, and provide two or three FEs (with at least one year of service) that they will assist in delivering this course. Experienced FEs should also review training materials prior to and arrive at the training session with personal examples.
- ☐ Become familiar with the content of the various references listed in this guide and their association to the presentation.
- ☐ 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 PFTNGQUALOVRST.VBACO@va.gov.