Pension and fiduciary service

PMC VSR Core Course

Phase 4: Introduction to Pension Management

Phase 4 Knowledge Check Preparation

Trainee Guide

February 2020

Phase 4 Knowledge Check Preparation

Lesson Overview

| Topic | Description |
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| Time Estimate: | 1.5 hours |
| Purpose of the Knowledge Check preparation: | This Knowledge Check preparation is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this Knowledge Check preparation is to get you ready to take the Phase 4 Knowledge Check.  |
| Prerequisite Training Requirements: | Prior to taking the Phase 4 Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–3. (Refer to the **Master Course Map** learning aid for a list of lessons.) |
| Target Audience: | This Knowledge Check preparation is for entry-level PMC VSRs. |
| References: | * M21-1 III.ii.1 (Initial Screening Process)
* M21-1 V.iii.1. A (General Information on the Effect Income and Net Worth Have on Pension and Parents DIC)
* M21-1 III.v.2.A (Decision Authorization)
* M21-1 III.v.2.B (Decision Notices)
* M21-1 III (General Claims Process)
* CPKM
* **Claim Types** job aid
* **Locating and Updating a Claimant Record** job aid
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| Technical Competencies: | * Processing Claims (PMC VSR)
* VBA Applications (PMC VSR)
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| Knowledge Check: | * Phase 4: Introduction to Pension Management Knowledge Check
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| What You Need: | * Trainee Guide
* Appendix A
* **Claim Types** job aid
* **Locating and Updating a Claimant Record** job aid
* Access to CPKM
* Access to VSR Assistant
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| PowerPoint Slides | Notes |
| --- | --- |
| Phase 4: Knowledge Check Preparation |  |
| Why It Matters!* **Phase 4 provides:**
	+ **High-level overview of the stages of a claim**
	+ **Various types of claims they will encounter in training and on the job**
	+ **Means of managing those claims (records)**
* These broad concepts provide structure for the rules and procedures that will be learned in Phases 5 and 6
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| PowerPoint Slides | Notes |
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| ****Phase 4 Lessons**** Phase 4 consists of the following three lessons:1. Stages of a Pension Claim
2. Types of Pension Claims and Claims Recognition
3. Pension Claims eFolder/Records Management
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| VA Stages of a Pension Claim * **Understanding the stages of a pension claim will help you efficiently and effectively process pension claims**
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| VA Stages of a Pension Claim Objectives* **Describe the stages of a pension claim**
	+ **Describe the purpose for initial screening and determining eligibility**
	+ **Describe the purpose of claims development and duty to assist**
	+ **Describe the purpose of referring a claim to the rating activity**
	+ **Describe the purpose of award determination and promulgation**
	+ **Describe the purpose of claimant notification**
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| Partner Activity—What’s the Question?* Instructions:
	+ Divide into pairs.
	+ Complete Part A of Appendix A: Phase 4 Worksheet.
	+ Take turns giving the answer and selecting the correct questions.
	+ Be prepared to share your finished activity with the class.
* Time allowed: 7–10 minutes
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| Types of Pension Claims and Claims Recognition * To be a successful PMC VSR, you need to recognize that there are a variety of claim types
* Failing to recognize characteristics of various claims causes time-consuming and benefit-affecting errors such as:
	+ Processing the claim incorrectly
	+ Failure to recognize that the claim requires a rating decision
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| Types of Pension Claims and Claims Recognition Objectives* Recognize the most common types of PMC VSR claims:
	+ Recognize the characteristics of each claim type
	+ Identify the correct forms or other correspondence of each claim type
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| Individual Activity—Know the Claim Type* Instructions:
	+ Complete Part B of Appendix A: Phase 4 Worksheet.
	+ Match the definition with the correct claim type.
	+ Use the **Claim Types** job aid.
	+ Be prepared to share your finished activity with other trainees.
* Time allowed: 10 minutes
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| Pension Claims eFolder/Records Management* One of your duties as a PMC VSR involves locating and updating records in the:
	+ eFolder
	+ Corporate record
	+ Claimant record
* These records must be tracked and updated to ensure that the:
	+ Claimant is receiving the benefits entitled
	+ PMC VSR has the evidence needed to justify claim decisions
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| Pension Claims eFolder/Records Management Objectives * Locate information in a record
* Update records when errors are identified
* Address lost claims
 |  |
| Partner Activity—Update the Record * Instructions:
	+ Divide into pairs.
	+ Complete Part C of Appendix A: Phase 4 Worksheet.
	+ Read each scenario.
	+ Answer questions about updating the claimant’s record.
	+ Be prepared to share your finished activity with the class.
* Time allowed: 10 minutes
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| Question and Answer ClarificationThis 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?**Phase 4: Introduction to Pension Management Knowledge Check |  |