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 |
| Technical Competencies: | * Processing Claims (PMC VSR) * VBA Applications (PMC VSR) |
| Knowledge Check: | * Phase 4: Introduction to Pension Management Knowledge Check |
| 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 |

| 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 |  |

| 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 |  |
| VA Stages of a Pension Claim   * **Understanding the stages of a pension claim will help you efficiently and effectively process pension claims** |  |
| 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** |  |
| 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 |  |
| 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 |  |
| 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 |  |
| 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 |  |
| 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 |  |
| 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 |  |
| Question and Answer Clarification  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?**  Phase 4: Introduction to Pension Management Knowledge Check |  |