

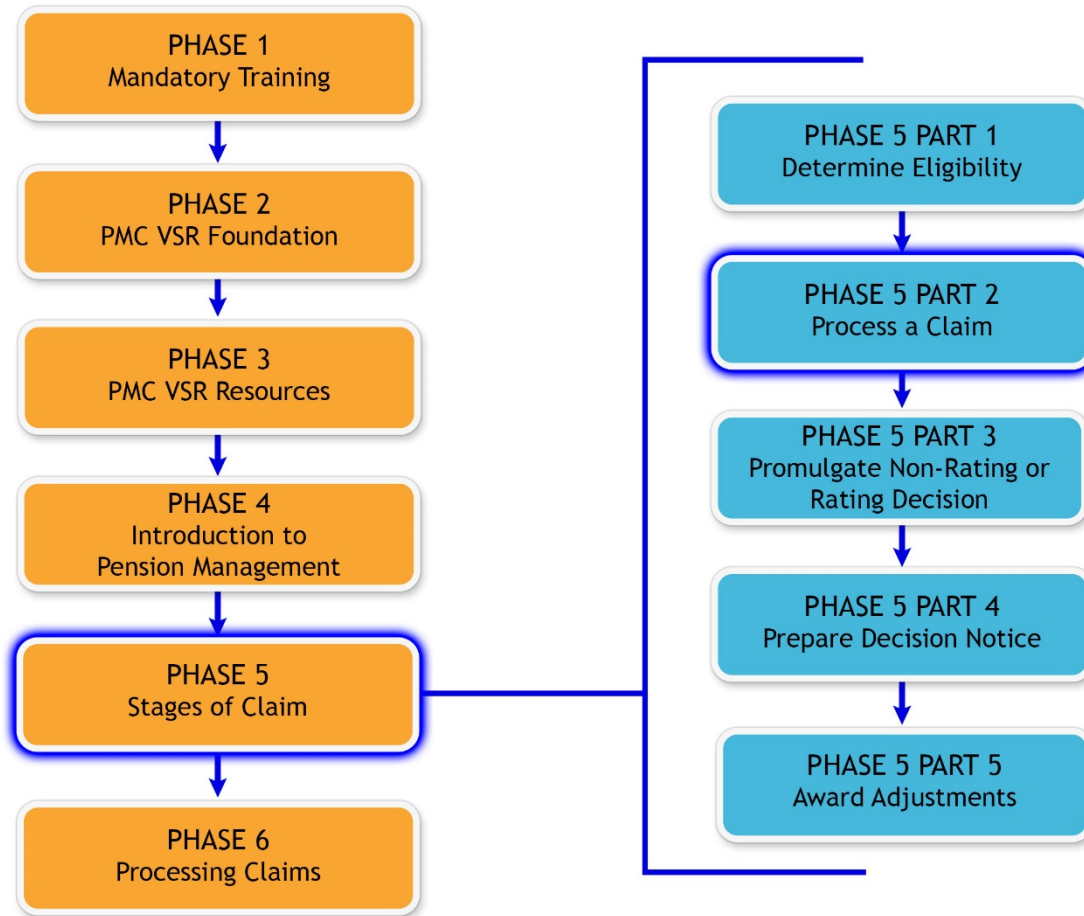


Phase 5, Part 2: Knowledge Check Preparation

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 2: Process a Claim



You Are Here





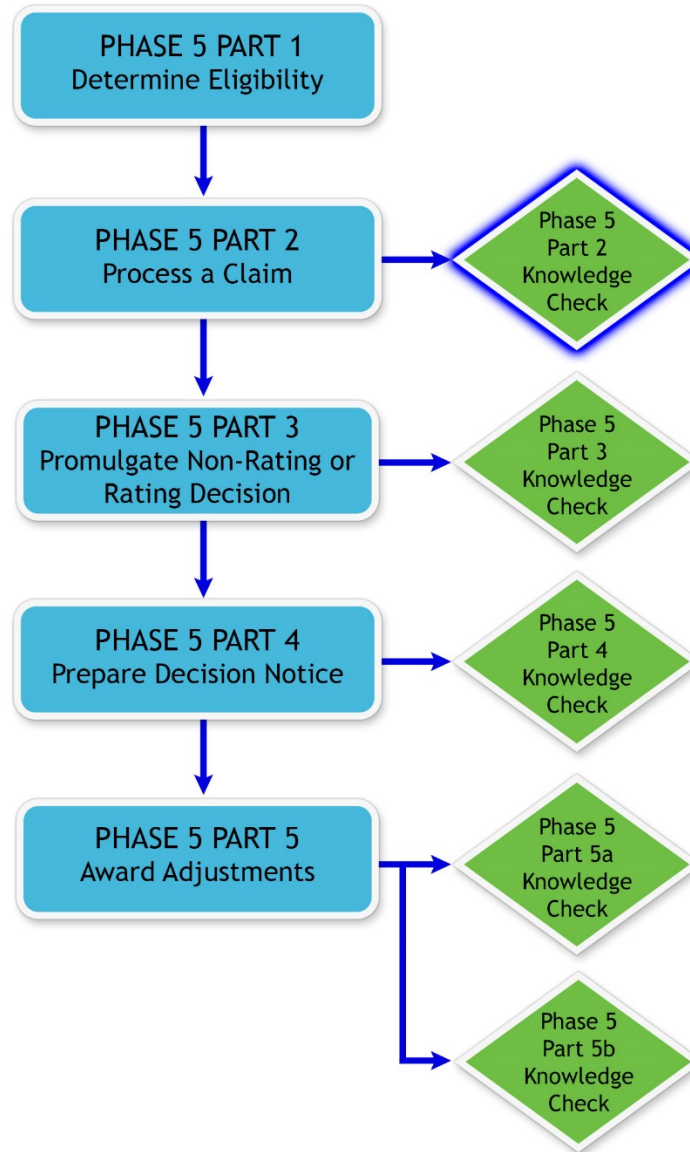
Why It Matters!

PMC VSRs review all pieces of information and evidence to determine the type of claim and how it should be processed. This includes:

- Developing for information/evidence needed to fulfill duty to assist for various types of claims.
- Requesting appointment of a fiduciary for an incompetency claim.



Knowledge Check





Knowledge Check Preparation Overview

This preparation will consist of the following:

- Lesson objectives review
- Partner activities
- Question/answer forum



Phase 5, Part 2 Lessons

Phase 5, Part 2

Lesson

Overview of the Development Process

Lesson

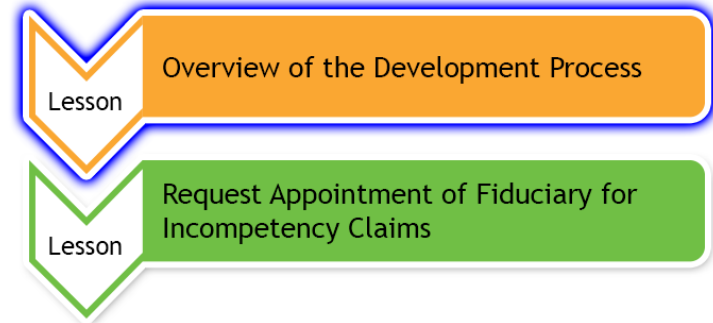
Request Appointment of Fiduciary for Incompetency Claims



Overview of the Development Process

- Develop for information/evidence needed to fulfill duty to assist.
- Objectives:
 - Define key terms used by PMC VSRs in development of a claim.
 - Describe the common steps in development.

Phase 5, Part 2





Overview of the Development Process

Question Writing Opportunity

- Instructions:
 - Use Appendix B: Question and Answer Worksheet to write any questions regarding overview of the development process.
 - Questions will be answered at the end of this preparation.
- Time allowed: 5 minutes



Matching Activity—Key Terms Used When Developing a Claim

- Instructions:
 - Match the terms with the correct description provided in Appendix A: Part A—Key Terms Used When Developing a Claim.
 - Use the **Develop for Missing Information/Evidence** job aid to assist in matching the terms.
 - Compare your finished activity with another trainee in the class.
- Time allowed: 5 minutes



Matching Activity—Key Terms Used When Developing a Claim Answers (1 of 2)

1. Non-evidentiary facts used to substantiate the claim.
 - *Information*
2. Request for documentation from state government, local government and privately held entity.
 - *Non-federal records*
3. Help claimant obtain information or evidence to substantiate the claim.
 - *Duty to Assist*
4. Provided by a nonexpert who has knowledge of facts or circumstances and conveys matters that can be observed.
 - *Competent lay evidence*



Matching Activity—Key Terms Used When Developing a Claim Answers (2 of 2)

5. Provided by a person who is qualified through education, training, or experience to offer medical diagnoses, statements, or opinions.
 - *Competent medical evidence*
6. Provide a notice of any information or evidence needed to substantiate the claim.
 - *Duty to Notify*
7. Request for documentation from Social Security Administration (SSA), VA Medical Centers (VAMCs), or National Personnel Records Center (NPRC).
 - *Federal records*



Group Activity—What's Your Next Step?

- Instructions:
 - Divide into groups of three.
 - Review Claim 1, Claim 2, and Claim 3.
 - Use the **Develop for Missing Information/Evidence** job aid.
 - Complete Appendix A: Part B—What's Your Next Step? Worksheet and decide what would be the next step in the development process.
 - Be prepared to share your finished activity with other groups.
- Time allowed: 15 minutes



Group Activity—What's Your Next Step?

Claim 1 Answers

1. Based on your review, do you need to contact the claimant?
 - *Answer provided by instructor based on example claim selected.*
2. What evidence is needed, if any, to continue processing the claim?
 - *Answer provided by instructor based on example claim selected.*
3. If evidence needs to be requested, what is the deadline for evidence to be received?
 - *Answer provided by instructor based on example claim selected.*



Group Activity—What's Your Next Step?

Claim 2 Answers

1. Based on your review, do you need to contact the claimant?
 - *Answer provided by instructor based on example claim selected.*
2. What evidence is needed, if any, to continue processing the claim?
 - *Answer provided by instructor based on example claim selected.*
3. If evidence needs to be requested, what is the deadline for evidence to be received?
 - *Answer provided by instructor based on example claim selected.*



Group Activity—What's Your Next Step?

Claim 3 Answers

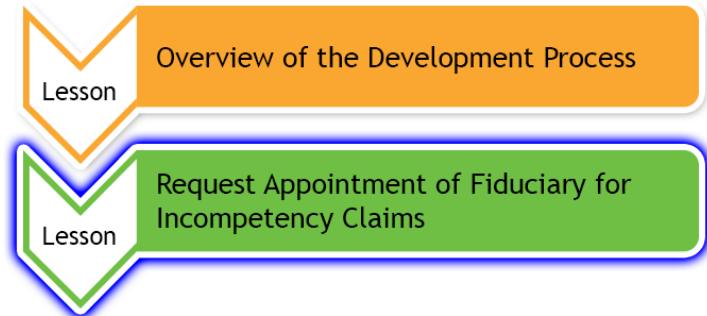
1. Based on your review, do you need to contact the claimant?
 - *Answer provided by instructor based on example claim selected.*
2. What evidence is needed, if any, to continue processing the claim?
 - *Answer provided by instructor based on example claim selected.*
3. If evidence needs to be requested, what the is deadline for evidence to be received?
 - *Answer provided by instructor based on example claim selected.*



Request Appointment of Fiduciary for Incompetency Claims

- You will have pension claims that indicate a beneficiary may be incompetent and fiduciary may need to be appointed
- Request Appointment of Fiduciary objectives:
 - Request appointment of a fiduciary for an incompetency claim.
 - Recognize incompetency indicators.
 - Confirm beneficiary has been proposed incompetent by the RVSR.
 - Process award.
 - Identify the elements of the proposed notice of incompetency rating.

Phase 5, Part 2





Request Appointment of Fiduciary Question Writing Opportunity

- Instructions:
 - Use Appendix B: Question and Answer Worksheet to write any questions regarding requesting appointment of a fiduciary.
 - Questions will be answered at the end of this knowledge check preparation.
- Time allowed: 5 minutes



Group Activity—Request Appointment of a Fiduciary

- Instructions:
 - Divide into groups of three.
 - Review Claim 4.
 - Complete Appendix A: Part C—Request Appointment of a Fiduciary Worksheet using the references provided in the exercise.
 - Be prepared to share your finished activity with other groups.
- Time allowed: 10 minutes



Partner Activity—Request Appointment of a Fiduciary Claim Answers

1. Does the claim indicate incompetency? Explain why or why not.
 - *Answer provided by instructor based on example claim selected.*
2. Does the beneficiary have a proposed rating of incompetency?
 - *Answer provided by instructor based on example claim selected.*
3. What information should you include when notifying the beneficiary of the Brady Bill?
 - *Answer provided by instructor based on example claim selected.*
4. Based on the information in the claim, do you need to prepare VA Form 21-592, Request for Appointment of a Fiduciary, Custodian or Guardian? Explain why or why not.
 - *Answer provided by instructor based on example claim selected.*



Question and Answer Forum

- Instructions:
 - Divide into groups of three or four.
 - Review the Appendix B: Question and Answer Worksheet with your group.
 - Mark any questions that need further clarification from the instructor.
- Time allowed: 10 minutes



Question and Answer Clarification





What's Next?

Phase 5, Part 2: Process a Claim Knowledge Check