Pension and fiduciary service

PMC VSR Advanced Core Course

Phase 5: Stages of a Claim

Part 3: Promulgate Non-Rating or Rating Decision

Phase 5, Part 3 Knowledge Check Preparation

Trainee Guide

February 8, 2017

Version 1.0

Phase 5, Part 3 Knowledge Check Preparation

Lesson Overview

| Topic | Description |
| --- | --- |
| 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 PMC VSRs ready to take the Phase 5, Part 3 Knowledge Check. |
| Prerequisite Training Requirements: | Prior to taking the Phase 5, Part 3 Knowledge Check Preparation, trainees must complete:   * PMC VSR Core Course Phases 1–4 and Phase 5, Parts 1 and 2. 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: | * **Master Course Map** learning aid * Compensation and Pension Knowledge Management (CPKM) * M21-1 III.ii.2.H.1 (General Information About Renouncement) * M21-1 III.ii.2.H.3.c (System Entries for Discontinuing an Award) * M21-1 III.iv.7.B.1.a (Review of Rating Decisions) * M21-1 III.iv.7.B.4.b (Handling Schedular Revisions) * M21-1.III.v.2.A (Decision Authorization) * M21-1 III.v.2.A.2 (General Information on Processing Decisions) * M21-1 III.v.2.A.3.a (Definition: Denial) * M21-1 III.v.2.A.3 (General Information on Denials) * M21-1 III.v.2.A.4 (Denials Based on a Claimant’s Failure to Furnish Requested Evidence) * M21-1 III.v.2.B (Decision Notices) * 38 CFR 3.106 (Renouncement) * **Annotate the Award Checklist** job aid * **Confirm Accuracy of a Rating Decision** job aid * **Initial Year** job aid * **Pension Systems and Applications** job aid * **Processing an Award Adjustment** job aid * **Processing an Award Renouncement** job aid * **Processing a Denial of Benefits** job aid * **Processing a Grant of Benefits** job aid * **Ready to Rate** job aid |
| Technical Competencies: | * Processing Claims (PMC VSR) * Special Monthly Pension (SMP) Processing * VBA Applications (PMC VSR) |
| Knowledge Check: | Phase 5, Part 3 Promulgate Non-Rating or Rating Decision Knowledge Check |
| What You Need: | * **Master Course Map** learning aid * Access to CPKM * Access to the following job aids from VSR Assistant:   + **Annotate the Award Checklist** job aid   + **Confirm Accuracy of a Rating Decision** job aid   + **Initial Year** job aid   + **Pension Systems and Applications** job aid   + **Processing an Award Adjustment** job aid   + **Processing an Award Renouncement** job aid   + **Processing a Denial of Benefits** job aid   + **Processing a Grant of Benefits** job aid   + **Ready to Rate** job aid * Appendix A: Example Claim * Appendix B: Phase 5, Part 3 Worksheet * Appendix C: Question and Answer Worksheet |

| PowerPoint Slides | Notes | |
| --- | --- | --- |
| Phase 5, Part 3: Knowledge Check Preparation |  | |
| You Are Here  Vertical flowchart with two columns showing the six phases of the PMC VSR course highlighting Phase 5 and a branch from Phase 5 showing its individual parts. In the left column, starting from the top, the phases are: Phase 1, Mandatory Training; Phase 2, PMC VSR Foundation; Phase 3, PMC VSR Resources; Phase 4, Introduction to Pension Management; Phase 5, Stages; and Phase 6, Processing Claims. Phase 5 branches to the right column of the flow chart showing the parts of Phase 5 and highlighting Part 3. From the top, the parts are: Phase 5 Part 1, Determine Eligibility; Phase 5 Part 2, Process a Claim; Phase 5 Part 3, Promulgate Non-rating or rating Decision; Phase 5 Part 4, Notify Claimant; and Phase 5 Part 5, Award Adjustment. |  | |
| Why It Matters!  **PMC VSR reviews and determines if the claim contains the information and evidence needed to determine eligibility for benefits which includes:**   * Reviewing a rating decision for completion and accuracy * Processing an award action in the correct system |  | |
| Knowledge Check  PMC VSR Phase 5 Part 3 Knowledge Check Diagram Vertical flowchart showing the five parts of Phase 5 of the PMC VSR course with the corresponding posttests. Phase 5 Part 3 Knowledge Check is highlighted. From the top, the parts are: Phase 5 Part 1, Determine Eligibility; Phase 5 Part 2, Process a Claim; Phase 5 Part 3, Promulgate Non-Rating or Rating Decision; Phase 5 Part 4, Notify Claimant and Phase 5, Part 5, Award Adjustments. |  |
| Knowledge Check Preparation Overview  **This preparation will consist of the following:**   * **Lesson objectives review** * **Partner activities** * **Question/answer forum** |  |
| ****Phase 5 Part 3 Lessons****  **Phase 5 Part 3 consists of two lessons: Confirm Accuracy of Rating Decision Overview of the Award Process** |  |
| Confirm Accuracy of Rating Decision  checklist on a clipboard with the following items checked:  Ensure effective date is correct   Confirm accuracy of information in rating decision  Send back to RVSR for correction  Update suspense reason in MAP-D |  |
| Confirm Accuracy of Rating Decision Objectives  Confirm accuracy of a rating decision.   * Confirm effective date is correct. * Confirm information in rating decision is technically accurate. * **Complete request for corrected rating.** |  |
| Accuracy of Rating Decision Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding accuracy of rating decision   + Questions will be answered at the end of this preparation * Time allowed: 5 minutes |  |
| Partner Activity—Rating Decision   * Instructions:   + Divide into pairs.   + Review Appendix A: Example Claim.   + Complete Part A of Appendix B: Phase 5, Part 3 Worksheet.   + Use the job aids listed in the Part A to help answer the questions.   + Be prepared to share your finished activity with the class. * Time allowed: 20 minutes |  |
| Partner Activity—Rating Decision Answers   1. What issues were sent to the RVSR for a rating decision? 2. What were the final decision(s) determined by the rater. 3. List any errors that need to be addressed and provide your rationale for the error. |  |
| Overview of the Award Process  Whiteboard with the following bullet points listed: A single claim may include a combination of grant or denial decisions Granting and denying benefits are processed on original claims, new, and reopened claims. An award adjustment and award renouncement are processed on running awards |  |
| Overview of the Award Process Objectives  Describe how to prepare an award action.   * Describe the responsibilities on award action for all decisions. * Describe the common steps for processing a grant of benefits. * Describe the common steps for processing a denial of benefits. * Describe the common steps for processing an award adjustment. * Describe the common steps for processing a renouncement. |  |
| Overview of the Award Process Question Writing Opportunity   * Instructions:   + Use Appendix C: Question and Answer Worksheet to write any questions regarding processing an award action.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity— What’s the Award Action   * Instructions:   + Divide into pairs.   + Review example claim in Appendix A: Example Claim.   + Complete Part B of Appendix B: Phase 5, Part 3 Worksheet.   + Use the job aids in Part B to help answer the questions.   + Be prepared to share your finished activity with the class. * Time allowed: 20 minutes |  |
| Partner Activity—What’s the Award Action Answers (1 of 2)   1. What are the decisions that need to be processed for an award action? |  |
| Partner Activity—What’s the Award Action Answers (2 of 2)   1. For each decision listed in question 1, choose whether the award action is a grant or denial of benefit. |  |
| **Question and Answer Forum**   * Instructions:   + Divide into groups of three or four.   + Review the Appendix C: Question and Answer Worksheet with your group.   + Mark any questions that need further clarification from the instructor. * Time allowed: 10–15 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 5, Part 3 Promulgate Non-Rating or Rating Decision Knowledge Check |  |