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.
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| 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
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| 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
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| 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 CheckPMC 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 Decisionchecklist 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 ObjectivesConfirm 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 Answers1. 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 ProcessWhiteboard 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 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 5, Part 3 Promulgate Non-Rating or Rating Decision Knowledge Check |  |