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.

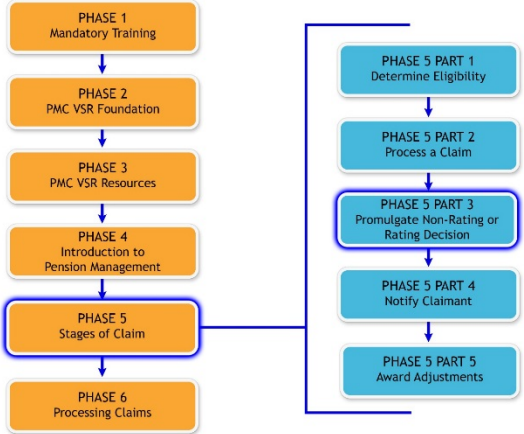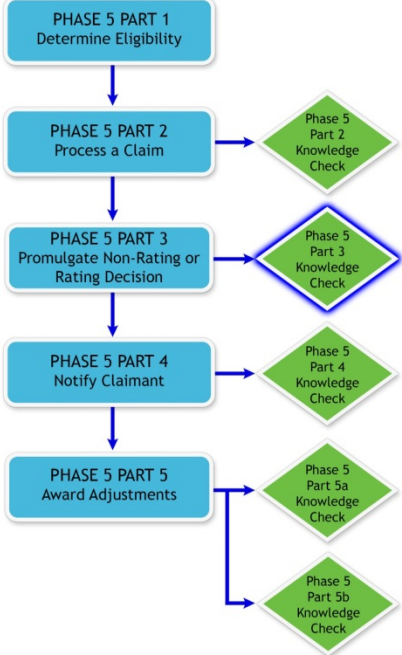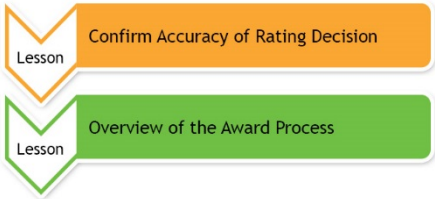| Topic	Description
References:	• **Master Course Map** learning aid
	• Compensation and Pension Knowledge Management (CPKM)
	• M21-1 III.ii.2.H.1 (General Information About Renouncement)
	• M21-1 III.ii.2.H.3.c (System Entries for Discontinuing an Award)
	• M21-1 III.iv.7.B.1.a (Review of Rating Decisions)
	• 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)

Topic	Description
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:
	
	    o **Annotate the Award Checklist** job aid
	
	    o **Confirm Accuracy of a Rating Decision** job aid
	
	    o **Initial Year** job aid
	
	    o **Pension Systems and Applications** job aid
	
	    o **Processing an Award Adjustment** job aid
	
	    o **Processing an Award Renouncement** job aid
	
	    o **Processing a Denial of Benefits** job aid
	
	    o **Processing a Grant of Benefits** job aid
	
	    o **Ready to Rate** job aid
	
	• Appendix A: Example Claim
	
	• Appendix B: Phase 5, Part 3 Worksheet
	
	• Appendix C: Question and Answer Worksheet

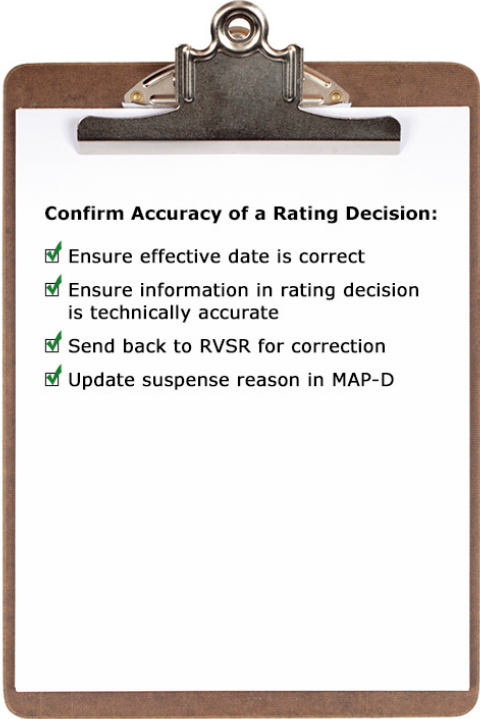| PowerPoint Slides	Notes
Phase 5, Part 3: Knowledge Check Preparation	

PowerPoint Slides	Notes
You Are Here PHASE 1 — Mandatory Training PHASE 2 — PMC VSR Foundation PHASE 3 — PMC VSR Resources PHASE 4 — Introduction to Pension Management PHASE 5 — Stages of Claim PHASE 6 — Processing Claims 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 PHASE 5 PART 5 — Award Adjustments	
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	

PowerPoint Slides	Notes
Knowledge Check PHASE 5 PART 1 — Determine Eligibility PHASE 5 PART 2 — Process a Claim → Phase 5 Part 2 Knowledge Check PHASE 5 PART 3 — Promulgate Non-Rating or Rating Decision → Phase 5 Part 3 Knowledge Check PHASE 5 PART 4 — Notify Claimant → Phase 5 Part 4 Knowledge Check PHASE 5 PART 5 — Award Adjustments → Phase 5 Part 5a Knowledge Check → Phase 5 Part 5b Knowledge Check	
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 Lesson — Confirm Accuracy of Rating Decision Lesson — Overview of the Award Process	

PowerPoint Slides	Notes
Confirm Accuracy of Rating Decision **Confirm Accuracy of a Rating Decision:** ☑ Ensure effective date is correct ☑ Ensure information in rating decision is technically accurate ☑ 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.	

PowerPoint Slides	Notes

Accuracy of Rating Decision Question Writing Opportunity
 	
• Instructions:
   o Use Appendix C: Question and Answer Worksheet to write any questions regarding accuracy of rating decision
   o Questions will be answered at the end of this preparation
• Time allowed: 5 minutes	

Partner Activity—Rating Decision
 	
• Instructions:
   o Divide into pairs.
   o Review Appendix A: Example Claim.
   o Complete Part A of Appendix B: Phase 5, Part 3 Worksheet.
   o Use the job aids listed in the Part A to help answer the questions.
   o Be prepared to share your finished activity with the class.
• Time allowed: 20 minutes	

PowerPoint Slides	Notes
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 • A single claim may include a combination of grant or denial decisions. • Granting and denying benefits are most commonly processed on original, 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.	

PowerPoint Slides	Notes

Overview of the Award Process Question Writing Opportunity
 	
• Instructions:
 	
   o Use Appendix C: Question and Answer Worksheet to write any questions regarding processing an award action.
 	
   o Questions will be answered at the end of this preparation.
 	
• Time allowed: 5 minutes	

Partner Activity— What's the Award Action
 	
• Instructions:
 	
   o Divide into pairs.
 	
   o Review example claim in Appendix A: Example Claim.
 	
   o Complete Part B of Appendix B: Phase 5, Part 3 Worksheet.
 	
   o Use the job aids in Part B to help answer the questions.
 	
   o 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?	

PowerPoint Slides	Notes
Partner Activity—What's the Award Action Answers (2 of 2) 2. For each decision listed in question 1, choose whether the award action is a grant or denial of benefit.	

Question and Answer Forum
 	
• Instructions:
 	
   o Divide into groups of three or four.
 	
   o Review the Appendix C: Question and Answer Worksheet with your group.
 	
   o Mark any questions that need further clarification from the instructor.
 	
• Time allowed: 10–15 minutes	

Question and Answer Clarification 	
What's Next Phase 5, Part 3 Promulgate Non-Rating or Rating Decision Knowledge Check	