Pension and fiduciary service

PMC VSR Advanced Core Course  
Phase 5: Stages of a Claim  
Part 5: Award Adjustments

Phase 5, Part 5a Knowledge Check Preparation

Trainee Guide

May 18, 2017

Version 1.0

Phase 5, Part 5a 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 course for PMC VSRs. The purpose of this knowledge-check preparation is to provide you with an opportunity to review, practice, and ask questions regarding what you have learned during Phase 5, Part 5a, so that you are better prepared for the knowledge check. |
| Prerequisite Training Requirements: | Prior to taking the Phase 5, Part 5a Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–4 and Phase 5, Parts 1–4, and Part 5 lessons 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 | * **Master Course Map** learning aid * Compensation and Pension Knowledge Management (CPKM) * See *Appendix A* for references introduced in earlier lessons |
| Technical Competencies: | * Program Benefits and Eligibility (PMC VSR) * Processing Claims (PMC VSR) * Special Monthly Pension (SMP) Processing * VBA Applications (PMC VSR) * Income Counting and Net Worth |
| Knowledge Check: | Phase 5, Part 5a: Award Adjustments Knowledge Check |
| What You Need: | * Trainee Guide * **Master Course Map** learning aid * Access to CPKM * Access to VSR Assistant for job aids * Appendix A: Knowledge Check Preparation References * Appendix B: Example Claim * Appendix C: Phase 5, Part 5 Worksheet * Appendix D: Question and Answer Worksheet * Calculator |

| PowerPoint Slides | Notes | |
| --- | --- | --- |
| Phase 5, Part 5a 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. |  | |
| Why It Matters!  Preparing an award adjustment involves reviewing any additional information provided by the claimant or third party, and deciding the reason for adjustment. |  | |
| Knowledge Check  Vertical flowchart showing the five parts of Phase 5 of the PMC VSR course with the corresponding posttests. Phase 5 Part 5a 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, Prepare Decision Notice and Phase 5, Part 5, Award Adjustments is divided into two knowledge checks. Phase 5 part 5a Knowledge check and 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 5a Lessons****  *List of lessons in Phase 5 Part 5a Determine Qualifying Expense Adjustments, Determine Amended Income Adjustments, and  Determine Net Worth Adjustments* |  |
| Determine Qualifying Expense Adjustments  Qualifying Expense Adjustments with the following: Enter qualifying expense, develop for the expense and deny the expense. |  |
| Determine Qualifying Expense Adjustments Objectives  Determine qualifying expense adjustments.   * Determine whether medical expense qualifies for an award adjustment. * Determine whether final expense qualifies for an award adjustment. * Determine whether educational expense qualifies for an award adjustment. |  |
| Qualifying Expense Adjustments Question Writing Opportunity   * Instructions:   + Use Appendix D: Question and Answer Worksheet to write any questions regarding qualifying expense adjustments.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Determine Amended Income Adjustments  Amended Income Adjustments: Develop for additional information if needed, Enter the amended countable income into VBMS-A, Calculate IVAP using the amended income, Process the award adjustment |  |
| Determine Amended Income Adjustments Objectives  Determine award adjustment based on amended income.   * Determine whether income type is countable. * Determine whether to develop for amended income information. * Determine whether amended income information is received within the time limit. * Determine whether amended income qualifies for an award adjustment. |  |
| Amended Income Adjustments Question Writing Opportunity   * Instructions:   + Use Appendix D: 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 |  |
| Determine Net Worth Adjustments   * Once the amended net worth has been calculated, then the award adjustment for net worth may result in one of the following two outcomes:   + **Update the VBMS-A with amended net worth amount**   + **A termination of benefits** * **An administrative decision for net worth determines if the net worth is a bar to benefits** |  |
| Determine Net Worth Adjustments Objectives  Determine award adjustment based on changes to net worth.   * Determine whether amended net worth is an inclusion or an exclusion. * Determine whether a net worth determination is required. * Determine whether to develop for additional net worth information. * Determine whether net worth is a bar to benefits. |  |
| Net Worth Adjustments Question Writing Opportunity   * Instructions:   + Use Appendix D: Question and Answer Worksheet to write any questions regarding net worth adjustments.   + Questions will be answered at the end of this preparation. * Time allowed: 5 minutes |  |
| Partner Activity—Award Adjustment   * Instructions:   + Find a partner.   + Review example claim in Appendix B: Example Claim.   + Answer the questions listed in Appendix C: Phase 5, Part 5a Worksheet.   + Use the job aids listed in Appendix A.   + Be prepared to share your finished activity with the class. * Time allowed: 25-30 minutes |  |
| Partner Activity—Award Adjustment Answers (1 of 3) |  |

Medical Expenses Answers

| Description | Amount Paid | Date Paid | Provider | Paid For | UME or CME? |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

| PowerPoint Slides | Notes | |
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| Partner Activity—Award Adjustment Answers (2 of 3) |  |
| Partner Activity—Award Adjustment Answers (3 of 3) |  |
| **Question and Answer Forum**   * Instructions:   + Divide into groups of three or four.   + Review the Appendix D: Question and Answer Worksheet with your group.   + Mark any questions that need further clarification from the instructor.   + Be prepared to share your answers with the class. * 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 5a: Award Adjustments Knowledge Check |  |