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

Lesson Plan

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 PMC VSRs with an opportunity to review, practice, and ask questions regarding what they have learned during Phase 5, Part 5a, so that they are better prepared for the knowledge check. |
| Prerequisite Training Requirements: | Prior to taking the Phase 5, Part 5a Knowledge Check Preparation, trainees 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: | * Lesson Plan
* **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
* Slides
* Projector
* Calculator
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Instructor Notes

This knowledge check preparation will provide trainees with a refresher of the topics covered in Phase 5, Part 5a: Award Adjustments. This will include a review of all lesson objectives, key teaching points covered in the lessons, partner activities to reinforce understanding, and a question and answer forum to provide additional clarification about the information presented.

| PowerPoint Slides | Instructor Activities |
| --- | --- |
| Phase 5, Part 5a Knowledge Check Preparation | **DISPLAY** slide “Phase 5, Part 5a Knowledge Check Preparation”**INTRODUCE** yourself as the instructor.**INTRODUCE** the 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. | **DISPLAY** slide “You Are Here”This icon indicates you should refer students to a document (e.g., a page in the Trainee Guide or a specific appendix) **REFER to the PMC VSR Master Course Map learning aid.****DESCRIBE the diagram.****INFORM trainees that Knowledge Check preparation will assist them in successfully completing the Phase 5, Part 5a: Award Adjustments Knowledge Check.** |
| 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. | **DISPLAY** slide “Why It Matters!”**REMIND** trainees that preparing an award adjustment involves reviewing any additional information provided by the claimant or third party, and deciding the reason for adjustment.**REFER trainees to Appendix A and have them briefly review all the references that are applicable to the award adjustment lessons.**  |
| Knowledge CheckVertical 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. | **DISPLAY** slide “Knowledge Check”**INFORM trainees** that they will be assessed on this content in the **Phase 5, Part 5a Knowledge Check**. **REMIND** trainees that all the lessons included on the knowledge check are also listed on the POI. |
| Knowledge Check Preparation Overview**This preparation will consist of the following:*** **Lesson objectives review**
* **Partner activities**
* **Question/answer forum**
 | **DISPLAY** slide “Knowledge Check Preparation Overview”**EXPLAIN that this preparation will consist of a review of the learning objectives for each lesson in Phase 5, Part 5a. This is followed by an activity to help reinforce their understanding of those objectives.** **INFORM trainees that in order to save time for the activities, there will be time at the end of this preparation to ask questions.** |
| ****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*  | **DISPLAY** slide “Phase 5, Part 5a Lessons”**REMIND** trainees that Phase 5, Part 5a consists of the following three lessons:1. **Determine Qualifying Expense Adjustments**
2. **Determine Amended Income Adjustments**
3. **Determine Net Worth Adjustments**
 |
| Determine Qualifying Expense AdjustmentsQualifying Expense Adjustments with the following: Enter qualifying expense, develop for the expense and deny the expense.  | **DISPLAY** slide “Determine Qualifying Expense Adjustments”**TRANSITION to the first lesson in Phase 5, Part 5: Determine Qualifying Expense Adjustments.****REMIND trainees** that the purpose of award adjustments is to ensure that VA is paying the correct rate to the beneficiary by adjusting the benefit properly based on the reported expenses.**REVIEW** the following key points with the trainees:* **If the expense qualifies for an adjustment, then enter the qualifying expense for all applicable periods in VBMS-A.**
* **If additional information is needed, then develop for the expense.**
* **If the expense does not qualify for an adjustment, then deny the expense.**

This icon indicates you should refer students to a document (e.g., a page in the Trainee Guide or a specific appendix)**REFER trainees to Appendix A and have them navigate to the “Determine qualifying expense adjustments” section. Have them read the list of the job aids related to qualifying expense adjustments.** **REMIND trainees that these job aids will assist them when determining qualified expense adjustments.**  |
| Determine Qualifying Expense Adjustments ObjectivesDetermine 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.
 | **DISPLAY** slide “Determine Qualifying Expense Adjustments Objectives”**PRESENT the objectives for this lesson.****TAKE 5–7 minutes to summarize the content related to these objectives.** |
| 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
 | **DISPLAY** slide “Qualifying Expense Adjustments Question Writing Opportunity”**INFORM** trainees that before transitioning to the next lesson for review, they now have the opportunity to capture any questions they have regarding qualifying expense adjustments.Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to Appendix D: Question and Answer Worksheet.**DIRECT trainees to write any questions on the worksheet**.**ALLOW 5 minutes to complete this opportunity.**  |
| Determine Amended Income AdjustmentsAmended 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   | **DISPLAY** slide “Determine Amended Income Adjustments”**TRANSITION to the second lesson in Phase 5, Part 5a:** **Determine Amended Income Adjustments.****REMIND trainees that when determining the amended income adjustment:*** **Enter the amended countable income into VBMS-A**
* **Develop for additional information if needed**
* **Calculate IVAP using the amended income**
* **Process the award adjustment**

Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to Appendix A and have them navigate to the “Determine amended income adjustments” section. **Have them read the list of the job aids related to amended income adjustments.** **REMIND trainees that these job aids will assist them when determining amended income adjustments.****EXPLAIN** totrainees that if the amended income causes the IVAP to e**xceed the MAPR, then the award has to be terminated.** |
| 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.
 | **DISPLAY** slide “Determine Amended Income Adjustments Objectives”**PRESENT the objectives for this lesson.****TAKE 7-10 minutes to summarize the content related to these objectives.** |
| 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
 | **DISPLAY** slide “Amended Income Adjustments Question Writing Opportunity”**REMIND** trainees that at this time, they can capture any questions they have regarding amended income adjustments.Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to Appendix D: Question and Answer Worksheet.****DIRECT** trainees to write any questions on the worksheet.** **ALLOW 5 minutes to complete this opportunity.**  |
| 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**
 | **DISPLAY** slide “Determine Net Worth Adjustments”**TRANSITION to the third lesson in Phase 5, Part 5a:** **Determine Net Worth Adjustments.****REMIND trainees that o**nce the amended net worth has been calculated for a running award, 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**

Emphasize Icon**EMPHASIZE that while no specific dollar amount can be designated as excessive net worth, if the claimant has a net worth of $80,000 or more, then a formal administrative decision is required. An administrative decision for net worth determines if the net worth is a bar to benefits.**Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to **Appendix A and have them navigate to the “Determine award adjustment based on changes to net worth” section. Have them read the list of the job aids related to net worth adjustments.****REMIND trainees that these job aids will assist them when determining net worth adjustments.****EXPLAIN to trainees that if the net worth is a bar to benefits, then the award is terminated the first of the following calendar year.**  |
| 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.
 | **DISPLAY** slide “Determine Net Worth Adjustments Objectives”**PRESENT the objectives for this lesson.****TAKE 7-10 minutes to summarize the content related to these objectives.** |
| 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
 | **DISPLAY** slide “Net Worth Adjustments Question Writing Opportunity”**REMIND** trainees that at this time, they can capture any questions they have regarding net worth.Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to Appendix D: Question and Answer Worksheet.****DIRECT** trainees to write any questions on the worksheet.** **ALLOW 5 minutes to complete this opportun**ity.  |
| 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
 | **DISPLAY** slide “Partner Activity—Award Adjustment”**DIVIDE trainees into groups of two.****DIRECT trainees to:*** **Review example claim in Appendix B: Example Claim**
* **Complete Appendix C:** Phase 5, Part 5a Worksheet **by answering the questions using the example claim in Appendix B and job aids in listed in Appendix A.**

**ALLOW 25-30 minutes to complete this activity.**  |
| Partner Activity—Award Adjustment Answers (1 of 3)1. See medical expenses listed in table. | **DISPLAY** slide “Partner Activity—Award Adjustment Answers (1 of 3)”**DISCUSS the answers with the trainees. Focus on the rationales provided by the trainees.**Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER trainees to Appendix A and have them navigate to the “Determine qualifying expense adjustments” section. Have the trainees review the 38 CFR and M21-1 manual references that relate to qualifying expense adjustments.** |

1. Medical Expenses Answers

| Description  | Amount Paid  | Date Paid | Provider | Paid For | UME or CME? |
| --- | --- | --- | --- | --- | --- |
| Medicare (Part B) Premium | $108.00/month | 2017 | Social Security | Veteran | CME |
| In-Home Caregiver | $600.00/month | 2017 | Debbie Williams | Veteran | CME |

| PowerPoint Slides | Instructor Activities |
| --- | --- |
| Partner Activity—Award Adjustment Answers (2 of 3)2. The evidence provided to accept the medical expenses are the VA Form 21P-8416, Medical Expense Report, In-Home Attendant Care Expense Statement/Attendant Affidavit, and the verification with Social Security to accept the Medicare Premiums.3. The amended income information includes the Veteran’s COLA increase to his Social Security income and lottery winning.4. IVAP: $2995. Payment date: 2/1/2017 (based on Omnibus)6. The IVAP will result in an increase of the pension rate. The Veteran’s monthly pension rate on his running award was $526 and now is $1050.  | **DISPLAY** slide “Partner Activity—Award Adjustment Answers (2 of 3)”**DISCUSS** the answers with the trainees. Focus on the rationales provided by the trainees.Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER** trainees to Appendix A and have them navigate to the “Determine award adjustment based on amended income” section.**WRITE the calculations for IVAP on the whiteboard.****WRITE the calculations for pension rate on the whiteboard.** |
| Partner Activity—Award Adjustment Answers (3 of 3)*7. Amended Net Worth: $37,000* 8. *Net worth is not a bar to benefits. The claimant’s assets are not sufficiently large enough that the claimant could live off these assets for a reasonable period of time.* | **DISPLAY** slide “Partner Activity—Award Adjustment Answers (3 of 3)”**DISCUSS the answers with the trainees. Focus on the rationales provided by the trainees.**Title: Reference Icon - Description: This icon indicates you should refer students to a document (e.g., a page in the Student Guide or a specific appendix)**REFER trainees to Appendix A and have them navigate to the Determine award adjustment based on changes to net worth section.** |
| **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
 | **DISPLAY** slide “Question and Answer Forum”**DIVIDE** trainees into groups of three or four.**DIRECT** trainees to review with their group any questions they have written down on the Appendix D: Question and Answer Worksheet. **INFORM** trainees to mark any questions that need further clarification from the instructor.**ALLOW** 10–15 minutes for this forum.**REVIEW** all questions with the class to confirm all answers are correct. |
| 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. | **DISPLAY** slide “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.**ASK** if they have any questions or concerns regarding Phase 5, Part 5a. Use this time to clear up any confusion or misconceptions about the information presented.**ANSWER any questions that need further clarification for the question and answer forum.** |
| **What’s Next**Phase 5, Part 5a: Award Adjustments Knowledge Check | **DISPLAY** slide “What’s Next”**DISCUSS** the upcoming Phase 5, Part 5a: Award Adjustments Knowledge Check.**REMIND** trainees to use the job aids and resources provided in the knowledge check to help answer the questions.  |