



PENSION AND FIDUCIARY SERVICE

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

Phase 5, Part 5b Knowledge Check Preparation

Trainee Guide

June 2017

Version 1.0

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

Phase 5, Part 5b 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 5b, so that you are better prepared for the knowledge check.
Prerequisite Training Requirements:	Prior to taking the Phase 5, Part 5b Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–4 and Phase 5, Parts 1–4, and Part 5 lessons 1-6. 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	<ul style="list-style-type: none"> • Master Course Map learning aid • Compensation and Pension Knowledge Management (CPKM) • See <i>Appendix A</i> for references introduced in earlier lessons
Technical Competencies:	<ul style="list-style-type: none"> • 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 5b: Award Adjustments Knowledge Check

Phase 5 Part 5b Knowledge Check Preparation Trainee Guide


Topic	Description
What You Need:	<ul style="list-style-type: none"> • 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: Phase 5, Part 5b Worksheet • Appendix C: Question and Answer Worksheet • Calculator

PowerPoint Slides	Notes
<p>Phase 5, Part 5b Knowledge Check Preparation</p> <p>You Are Here</p>	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Why It Matters!</p> <p>Preparing an award adjustment, such as adding or removing a dependent may involve applying due process. It may also cause an overpayment. It is important to provide the claimant with the opportunity to submit evidence or information as well as request a waiver of overpayment.</p>	
<p>Knowledge Check</p> <pre> graph TD P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim] P2 --> KC2{Phase 5 Part 2 Knowledge Check} P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P3 --> KC3{Phase 5 Part 3 Knowledge Check} P3 --> P4[PHASE 5 PART 4 Prepare Decision Notice] P4 --> KC4{Phase 5 Part 4 Knowledge Check} P4 --> P5[PHASE 5 PART 5 Award Adjustments] P5 --> KC5a{Phase 5 Part 5a Knowledge Check} P5 --> KC5b{Phase 5 Part 5b Knowledge Check} </pre> <p>The flowchart illustrates the Phase 5 process. It begins with 'PHASE 5 PART 1 Determine Eligibility', which leads to 'PHASE 5 PART 2 Process a Claim'. From Part 2, the process can proceed to 'PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision' or to a 'Phase 5 Part 2 Knowledge Check'. From Part 3, the process can proceed to 'PHASE 5 PART 4 Prepare Decision Notice' or to a 'Phase 5 Part 3 Knowledge Check'. From Part 4, the process can proceed to 'PHASE 5 PART 5 Award Adjustments' or to a 'Phase 5 Part 4 Knowledge Check'. From Part 5, the process can proceed to either a 'Phase 5 Part 5a Knowledge Check' or a 'Phase 5 Part 5b Knowledge Check'. The 'Phase 5 Part 5b Knowledge Check' box is highlighted with a blue border.</p>	

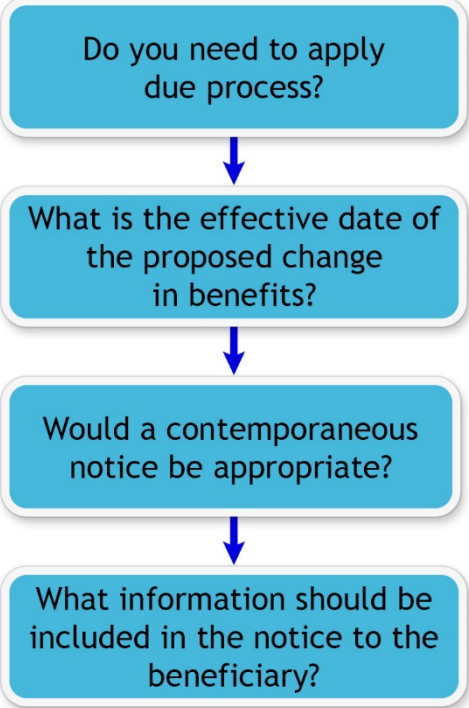
**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Knowledge Check Preparation Overview</p> <p>This preparation will consist of the following:</p> <ul style="list-style-type: none"> • Lesson objectives review • Partner activity • Individual activity • Question/answer forum 	
<p>Phase 5, Part 5b Lessons</p> <div style="text-align: center;"> <p>Phase 5, Part 5b</p>  </div>	<p>1.</p>
<p>Determine Dependency Adjustments</p> <ul style="list-style-type: none"> • Used to determine who can be considered a dependent • Used to determine allowance based on dependents <ul style="list-style-type: none"> ○ Can affect award and payment amount ○ May require development or due process 	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Determine Dependency Adjustments Objectives</p> <p>Determine award adjustment based on change in dependency.</p> <ul style="list-style-type: none">• Determine changes in dependency.• Determine actions to take based on dependency changes.• Determine the award adjustment based on change in dependency.	
<p>Determine Dependency Adjustments Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding dependency adjustments.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Apply/Issue Due Process Provisions</p>  <pre> graph TD A[Do you need to apply due process?] --> B[What is the effective date of the proposed change in benefits?] B --> C[Would a contemporaneous notice be appropriate?] C --> D[What information should be included in the notice to the beneficiary?] </pre>	
<p>Apply/Issue Due Process Provisions Objectives</p> <p>Apply due process provisions to a claim.</p> <ul style="list-style-type: none"> • Determine if due process is applicable to a claim. • Determine effective dates for the proposed change in benefits. • Determine if change requires contemporaneous notice or due process notification letter. • Identify due process elements for the due process letter/contemporaneous notice. 	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Apply/Issue Due Process Provisions Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding applying due process.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	
<p>Partner Activity—Dependency Adjustment and Due Process</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into pairs.○ Review example claim in VBMS.○ Answer the questions listed in Appendix B: Phase 5, Part 5b Worksheet.○ Use the job aids listed in Appendix A.○ Be prepared to share your finished activity with the class.• Time allowed: 25-30 minutes	

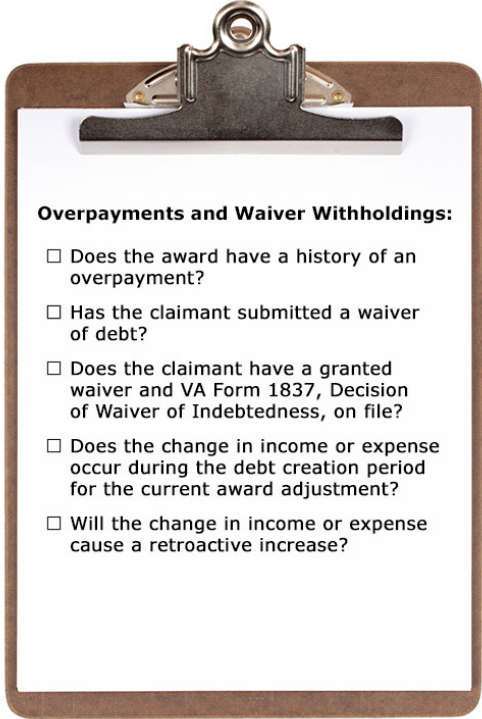
**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Partner Activity—Dependency Adjustment and Due Process Answers (1 of 2)</p> <ol style="list-style-type: none">1. Has the dependency change information been submitted by the claimant, fiduciary, or third party? Provide rationale for your decision. <i>Correct answer will be provided by the instructor.</i>2. Is the dependent being added or removed from the award? Provide rationale. <i>Correct answer will be provided by the instructor.</i>3. Is all the information present to add or remove the dependent? Provide rationale. <i>Correct answer will be provided by the instructor.</i>	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Partner Activity—Dependency Adjustment and Due Process Answers (2 of 2)</p> <p>4. What is the effective date of proposed change in dependency? <i>Correct answer will be provided by the instructor.</i></p> <p>5. Based on your review of the claim, does the claim require due process or contemporaneous notice? Provide rationale. <i>Correct answer will be provided by the instructor.</i></p> <p>6. What needs to be included in the due process letter/contemporaneous notice? <i>Correct answer will be provided by the instructor.</i></p>	


**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Introduction to Overpayments and Waiver Withholdings</p>  <p>Overpayments and Waiver Withholdings:</p> <ul style="list-style-type: none"><input type="checkbox"/> Does the award have a history of an overpayment?<input type="checkbox"/> Has the claimant submitted a waiver of debt?<input type="checkbox"/> Does the claimant have a granted waiver and VA Form 1837, Decision of Waiver of Indebtedness, on file?<input type="checkbox"/> Does the change in income or expense occur during the debt creation period for the current award adjustment?<input type="checkbox"/> Will the change in income or expense cause a retroactive increase?	
<p>Introduction to Overpayments and Waiver Withholdings Objectives</p> <p>Recognize whether a waiver withholding is required.</p> <ul style="list-style-type: none">• Recognize an overpayment in VBMS-A.• Recognize a retroactive award increase.• Recognize whether a waiver has been granted.• Recognize whether a retroactive award increase occurs during the debt creation period.	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Introduction to Overpayments and Waiver Withholdings Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding overpayments and waiver withholdings.○ Questions will be answered at the end of this preparation.• Time allowed: 5 minutes	
<p>Individual Activity— Overpayments and Waiver Withholdings</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Review the scenario in Appendix B: Introduction to Overpayments and Waiver Withholdings Scenario section.○ Answer the questions provided at the end of the scenario.○ Use the job aids listed in Appendix A.○ Be prepared to discuss your answers with the class.• Time allowed: 15-20 minutes	
<p>Individual Activity— Overpayments and Waiver Withholdings Answers</p>	

**Phase 5 Part 5b Knowledge Check Preparation
Trainee Guide**

PowerPoint Slides	Notes
<p>Question and Answer Forum</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ 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.○ Be prepared to share your answers with the class.• Time allowed: 10–15 minutes	
<p>Question and Answer Clarification</p> 	
<p>What's Next</p> <p>Phase 5, Part 5b: Award Adjustments Knowledge Check</p>	