Compensation Pension Knowledge Management Portal

for Claims Assistants

Instructor Lesson Plan

Time Required: 1.5 Hours

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 4456314 |
| Prerequisites | There are no prerequisites for this course. |
| target audience | The target audience for entry level employees and practical application is designed towards Claims Assistants. |
| Time Required | 1.5 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * Guide to Searching the Manual for Claims Assistants PowerPoint Presentation * Guide to Searching the Manual for Claims Assistants Trainee Handout with Scavenger Hunt * Guide to Searching the Manual for Claims Assistants Answer Key |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment * VA CPKM access to complete the exercise |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| Introduction to the Compensation Pension Knowledge Management (CPKM) Portal | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | 0.25 hours |
| Purpose of Lesson  Explain the following: | | This lesson is intended to familiarize claims assistants with the tools located in the CPKM, as well as how to effectively search for references in order to more accurately and efficiently process claims.  This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * The Compensation Pension Knowledge Management (CPKM) Portal * Publications included in CPKM * Search tools in the CPKM * Tracking changes made to references |
| Lesson Objectives  Discuss the following:  Slide 2  Handout 2 | In order to accomplish the purpose of this lesson, the claims assistant will be required to accomplish the following lesson objectives.  Theemployee will be able to:   * Recognize the Compensation Pension (CPKM) Portal * List characteristics of CPKM * Identify effective search strategies * Explain how to find a list of changes by date, change date, and audience * Demonstrate use of the manual for research | |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed. | |
| Motivation | CPKM housed on the Knowledge Management (KM) portal is now the single source for reference materials and guidance. Knowing how to use this tool effectively saves employees time and allows for more accurate claims processing, from beginning to end. | |
| STAR Error code(s) | CPKM assists claims processors to ensure accurate claims adjudication. CPKM directly impacts all error categories. | |
| References  Slide 3  Handout 2 | Explain where these references are located in the workplace.   * [**Compensation Service Intranet Home Page**](https://www.vbms.vba.va.gov/vbmsp2/eFolder) * [**Compensation.Pension (CPKM) Portal**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034) * [**KnowVA**](https://www.knowva.ebenefits.va.gov/)   Remind the trainees that if they are having issues accessing the CPKM, KnowVA can be accessed by anyone through [www.knowva.ebenefits.va.gov](http://www.knowva.ebenefits.va.gov/).  Knowledge VA, or KnowVA, is an external-facing Web platform that provides Veterans, their families, survivors, and Veteran advocates with access to the same information claims processors use to process and make decisions on benefit claims.  *Talking point: Emphasize that KnowVA is a mirror image of a portion of the internal content, and that while not everything available internally is accessible via KnowVA, it is updated concurrently with internal updates – so what is available, is up to date.* | |

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| Topic 1: Introduction to the Compensation Pension Knowledge Management Portal | |
| Introduction | This topic will allow the employee to better understand CPKM and all of its uses. |
| time required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Recognize the Compensation Pension (CPKM) Portal and what it means to the current claims processing environment. * List characteristics of CPKM * Using the handout and references, provide the trainees with a basic understanding of VA publications as well as characteristics of the CPKM.   The following topic teaching points support the topic objectives:   * What are VA Publications? * Definition of Terms * Using the CPKM |
| What Does It Do?  *Slide 4*  *Handout 3* | The CPKM was established in 2015, replacing the M21-1 MR (now labeled M21-1 Archive). With the transformation, it made searching for published guidance easier by putting everything in one location.  Prior to the CPKM, everything was housed in different locations; however, with the transformation of the new manual,   * + the entire M21-1, nearly 6,000 pages of content, was reviewed and updated, and   + all existing published guidance, such as Fast Letters, Training Letters, and Veterans Service Center Manager Bulletins, were reviewed and incorporated into the M21-1, as applicable.   *We’ll still have to read the updates. Laws will still change and clarification will still come out, but this is nothing new, VA employees have always done this.*  *As an easy tracking mechanism, we are also able to receive calendar updates to let us know what we need to check out for changes and updates.* |

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| Parts of the Live Manual  *Slide 5*  *Handout 3* | In addition to the incorporation of existing published guidance, the new CPKM also has direct links for each of the three manuals used in VA.  The first manual shown is the M21-1 Adjudication Procedures Manual. This manual contains guidelines, procedures and step by step directions for how to develop and process claims in the Veterans Service Center (VSC) and Pension Management Center (PMC).  This manual contains nine parts:   * Part I: Claimants Rights and Responsibilities * Part III: General Claims Process * Part IV: Compensation, DIC, and Death Compensation Benefits * Part V: Pension and Parents Dependency and Indemnity Compensation * Part VI: Chapter 18 Benefits * Part VII: Burial Benefits * Part VIII: Accrued Benefits * Part IX: Ancillary and Special Benefits * Part X: Matching Programs   Each of these parts contains subparts, chapters and sections applicable to the main heading. These subparts break down each of the work processes for employees of the VSC and PMC through guides and step by step instructions.  The second manual shown is the M21-3 Training Program Manual. This manual contains training curriculums and requirements for use in the VSC and PMC.  This manual contains two parts:   * Part 1: Compensation Service Training * Part 2: Pension Management Center Training   Each of these parts contains sections applicable to the training programs for each division. Part 1 breaks down the national training curriculum with courses required for the VSC as well as guidance and requirements for each team of employees. Part 2 breaks down the responsibilities and requirements for pension and fiduciary employees and goes into greater detail regarding their overall training needs.  The third manual shown is the M21-4 Manual. The purpose of this manual is to prescribe and discuss workload and staffing controls applicable to Compensation, Pension, and Fiduciary activities in the Regional Office (RO). This manual also describes tools and strategies available to field managers to assist in assessing the level of service afforded to claimants.  This manual contains four appendices and seven chapters:   * Appendix A: Regional Office Station Numbers and Payee Codes * Appendix B: End Product Codes and Work-Rate Standards for Quantitative Measurements * Appendix C: Index of Claims Attributes * Appendix D: Index of Claim Stage Indicators * Chapter 1: Overview * Chapter 2: Workload Management Plans * Chapter 3: National Quality Reviews * Chapter 4: Claims and Appeals Processing Timeliness * Chapter 5: Systematic Analyses of Operations (SAO) * Chapter 6: Quality Review Teams (QRT) * Chapter 7: PMC National Quality and QRT   The four appendices are very helpful to Claims Assistants during the initial stages of working with a claim, as the sections within each provide information relating to end products (EPs), special issues and required flashes for claims being established in VBMS. |
| *EXERCISE* | *Demonstrate where to go to find the CPKM and open each of the manuals so that the employee knows where to find each. Following opening each manual, identify the subparts, chapters or sections in each.* |

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| Topic 2: Searching the CPKM | |
| Introduction | This topic will allow the trainee to better understand how searches work and how to retrieve the data they want. |
| time required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Identify effective search strategies |
| How to search the CPKM  *Slide 6*  *Handout 4* | The most effective way to find information in the CPKM is by using the search function which will be described in this section. It is also important to understand the general make-up of the manual.  The Compensation and Pension Portal, or Compensation and Pension Knowledge Management (CPKM) Portal, is one of the many portals in KM and it houses **all** of the following topics:   * 38 Code of Federal Regulations * Compensation Service Bulletins (CSBs) * Fast Letters (historical) * Frequently Asked Questions (historical) * M21-1 Adjudication Procedures Manual * M21-3 Training Program Manual * M21-4 Manual * Pension Management Centers (PMC) Monthly Call Bulletins * Personal Records Management * Policy * Policy Letters * Rate Tables * Security and Privacy * TIP Sheets * Training Letters (historical), and * VA Facility Contact.   By clicking each or any of these topics, you will be routed to the publication displayed.  It is important to note if you reference CPKM, you are talking about the portal as a whole, meaning **everything** listed above.  ***Note***:  The terms above are not interchangeable. KM is a VA-wide platform housing multiple internal and external platforms, of which CPKM and KnowVA are just two. The M21-1 (or Live Manual) is only one of 16 topics housed in CPKM.  If you know which section of the portal that you are looking for, using the Browse Topics option will take you directly there. However, if you are unsure of the exact location of the material that you need, conducting a search of the Knowledge Base will assist you by filtering through all of the publications available for the terms entered. |
| Search terms  *Slide 7*  *Handout 5* | When completing a search of the Knowledge Base,   * Use terms that are * specific (relate to your actual topic) * sensitive (aren’t included in every topic like “rating” or “decision”), and * unique, if possible. * Don’t use a long phrase because that will pull up many topics unrelated to your search.   If you still cannot find what you’re looking for, |
| Can’t find it?  *Slide 8*  *Handout 6*  *Explain the following:* | * Consider using a Boolean search * Try alternate wording   + Example: use future exam vs. reexamination     - Future exam brings up relevant references; reexamination brings up odds and ends   + Example: TDIU, IU, or Individual Unemployability?     - All of these terms pull up good, specific references   ***Helpful hints****:*  *1. Talk about the fact that you can select a section from the Browse button on KM (such as M21-1, FL, FAQ, etc., then you can search in the lower/secondary search box in just that area of the KM.*  *2. You could also type a search term in the “Search Knowledge Base” bar next to the “Browse Topics” button, then a “Refine Your Search” menu comes up on the left. You can narrow your search using content type (Policy/Procedures, Rescinded, Training, etc.), or Special Benefit Group, Target Audience, or Process Stage.* |
| Exercise | Show the trainees how to conduct various search options through of several examples. Such as:   * When you have the M21-1 citation – “III.ii.5.A.1.a.” * When you have a specific search term – “unidentifiable mail” |
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| Topic 3: Changes to the CPKM | |
| Introduction | This topic will allow the trainee to understand where to find changes, dates of changes, and the target audience for updated guidance. |
| time required | 0.25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Explain how to find a list of changes by date, change date, and audience * Demonstrate use of the manual for research |

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| Where are new changes posted?  Slides 9  Handout 8 | Because the CPKM is a running collection of VA publications, it is constantly updated with new additions and changes. Some of the changes are applicable to all claims processors; however, some are specific to certain areas.  When changes are made, the target audience is noted in the conversion so that all involved with that process will see the adjustment.  There are several places that will show the change as well as the date of the change. When you actually go into the manual, you will see the date of the last change before each section. However, if you are looking for specific changes, you can go to the Calendar on the C&P Homepage, the main page of the CPKM, or the “Changes by Date” fly out in the Browse Topics dropdown.  Walk through the following steps with the trainees:   * **Log in** to CPKM * Click Browse Topics * Click VA Key Changes * Click on year folder * Click hyperlink to month or scroll to changes or use CTRL+F and search for your keyword(s)   Make sure to make note of the following:   * Change dates listed in left column * Changes listed newest to oldest due to requests from the field * Target audience listed on right   Remind the trainee that it is always a good idea to look at the change description to see if the change may indirectly affect them. |
| Calendar of Changes  *Slide 10*  *Handout 9*  **Additional Information**  Slide 11  Explain the following: | Every time that there is an update to the CPKM, it is loaded into the Calendar page on the C&P website next to the date of the change. From this portion of the website, you are able to directly link to the changed reference, as well as see who the target audience is for the change.  Once in the manual, you will see a “Change Date” listed above the section changed that will correlate with the date appearing on the Calendar page.  Discuss with the trainee that while it is good practice to check the calendar regularly, for easier notifications they can sign up for calendar updates to be received via email.  *Demonstrate how to sign up for these updates.*  Upon arriving on the questions page, address any questions that might have come up throughout the presentation.  If there aren’t any questions, remind the trainees that there are additional CPKM/Living Manual resources already provided by the Collaboration Strategies Team should they have more questions at a later date or if they would like more information:   * <https://www.vapulse.net/docs/DOC-20438> - FAQs on training * <https://www.vapulse.net/docs/DOC-20574> - Video of training * You tube: <https://www.youtube.com/watch?v=xHpBxpc4XqQ>   *The CPKM/Live Manual Training links above include helpful information about system limitations and what the team has already done to make this a useful tool. It’s also worth investing the 8 minutes, if you haven’t already, to check out the helpful hints put out in this training which can be viewed through the VA pulse or You Tube.* |

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| DEMONSTRATION | Demonstrate finding the following items in CPKM for the class. Add additional items as needed - is there something people have been struggling to find? Take a look as a class at how to get to that reference and/or how to complete a search for step by step processes when working a claim. (See PowerPoint for instructions if needed).   * How to find the changes by date page, change date, and target audience * How to use a Boolean search * "III.ii.3.C.4.c" (Acceptable Versions of VA Form 21-22) * "III.ii.2.F.1.e" (Reconsideration Claims) * Additional examples * How to use search terms to pull up a reference * Foreign claims * Substantially complete application * Hearing loss (note: many references have been rescinded), so it’s important to search through links that appear * Veteran status * Illustrate how different terms may have different results * Reexamination * Future exam |
| Regional Office Specific Topics | * Not Applicable |

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| Practical Exercise | | |
| Time Required | | 0.5 hours |
| EXERCISE | | Give students 15 minutes to go through scavenger hunt. After they finish, ask the class if there was trouble finding any particular item. Were some things easier to find using search terms vs. Boolean searches?  Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
| Lesson Review, Assessment, and Wrap-up | | |
| Introduction  Discuss the following: | The Field Guide to Searching CPKM lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. | |
| Lesson Objectives | You have completed the Field Guide to Searching CPKM lesson.  The trainee should be able to:   * Recognize the Compensation Pension (CPKM) Portal * List characteristics of CPKM * Identify effective search strategies * Explain how to find a list of changes by date, change date, and audience * Demonstrate use of the manual for research | |
| Assessment | Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course.  The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. | |