

**Pension & Fiduciary Service**

**Inquiry Response Highlights**

**December 2019**

# Table of Contents

[Table of Contents 1](#_Toc29989665)

[**Pension Management Center Related Inquiries** 1](#_Toc29989666)

[Foreign Claims that are Ready for Decision 1](#_Toc29989667)

[**Fiduciary HUB Related Inquiries** 2](#_Toc29989668)

[Questions Regarding Next of Kin Letter 2](#_Toc29989669)

[**P&F Service Information** 2](#_Toc29989670)

[P&F Service Contact Information 2](#_Toc29989671)

[Disclaimer 3](#_Toc29989672)

# **Pension Management Center Related Inquiries**

# Foreign Claims that are Ready for Decision

**Target Audience**: PMC Claims Processors

**Question**: We are wondering if the below reference could be considered for an update to include guidance on how to handle foreign claims in the Awaiting Decision life cycle/Ready for Decision (RFD) claim status.

The table in M21-1 III.ii.5.A.1.b states that the Philadelphia PMC has jurisdiction for “all other foreign countries” and the Exception at the bottom notes that all rating decisions will be handled by the St. Paul and Milwaukee PMCs. However, it is unclear on which station should handle foreign claims. We assume that either Milwaukee or St. Paul should work any RFD foreign claims in their respective inventories, but the manual is not clear. We are hoping that an update to this reference would help avoid routing claims to Philadelphia where they no longer have the capacity to handle RFD claims since their RVSRs were reassigned to the VSC. Also, if foreign claims in the RFD status should be routed to one specific station, please indicate which station that should be.

**P&F Response:** Per M21-1 Part III, Subpart ii, 5.A.1.b “all other foreign claims” fall under the jurisdiction of the Philadelphia Pension Management Center (PMC). However, these claims are rated by the St. Paul or Milwaukee PMCs since June 10, 2019, which is noted in the exception of this block. This exception applies to multiple scenarios in the listed table. After the rating is completed, it is routed back to the Philadelphia PMC for promulgation

Please note that routing occurs through National Work Queue. If you are encountering instances of misrouted claims, please provide us with specific examples for troubleshooting purposes.

**Result:** Clarification provided.

# **Fiduciary HUB Related Inquiries**

# Questions Regarding Next of Kin Letter

**Target Audience**: Legal Instrument Examiners

**Question 1**: Are Fiduciary Hubs still required to send out heir letters to next of kin when the beneficiary passes away and no final accounting is called?

**P&F Response 1**: No. If the situation does not require an accounting such as those noted in FPM [3.B.1.a](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/content/554400000052094/FPM-3B1-When-a-Fiduciary-Must-Account#3.B.1.a) and [3.C.3.a](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/content/554400000107286/FPM-3C3-Final-Accountings), then a Next of Kin letter is not required.

**Question 2**: Are Fiduciary Hubs required to send out heir letters to next of kin when the beneficiary passes, the Fiduciary Hub receives the FNOD, and the notification was one of the ways listed in [III.ii.8.A.1.d](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/content/554400000014145/M21-1-Part-III-Subpart-ii-Chapter-8-Section-A-General-Policies-for-Veteran-First-Notice-of-Death-FNOD-Processing)?

**P&F Response 2**: Yes. The fiduciary hubs should follow the guidance provided in M21-1, III.ii.8.A.1.d., which provides specific instances in which a Next of Kin letter must be completed in conjunction with a FNOD.

**Result:** Clarification provided.

# **P&F Service Information**

# P&F Service Contact Information

Policy and Procedure questions from the PMCs or Fiduciary Hubs should be submitted to P&F Service at VAVBAWAS/CO/P&F POL & PROC by the Quality Review coach or PMC/Fiduciary HUB Division Management.

P&F Service would like to remind you that all inquiries sent to the Policy and Procedures Mailbox must include the references previously researched, key words or phrases used to search in CPKM. P&F Service is available to assist when there is confusion about a certain policy or procedure, however, PMCs and Fiduciary Hubs are required to research and attempt to resolve the issue before sending the question to the P&F Service Policy and Procedures Mailbox. Additionally, including all words used to search topics in CPKM will allow P&F Service to add those search words into CPKM if they were not already in the metadata for a certain manual reference.

Training and Quality questions can be directed to: VAVBAWAS/CO/P&F TNG QUAL OVRST.

Systems-related questions can be directed to: VAVBAWAS/CO/P&F BUS MGMT.

# Disclaimer

Please note that all responses provided are for informational purposes only. If changes to the M21-1 Adjudication Procedures Manual or Fiduciary Program Manual (FPM) are needed, they are made in conjunction with the response. The M21-1 and FPM supersede any inquiry response.