Training Coordinator’s Module Guide
for
New Claims for Pension

November 5, 2013

For Training Purposes Only

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Section 1 – Introduction

Introduction

Welcome to the *New Claims for Pension* Module of the Basic Ratings Training and Performance Support System. Please read this Module Guide in its entirety. Feel free to highlight portions or write down notes as you read through this document. Within these pages, you will find the information you need to successfully set up and implement this module.

Section 1 of this guide is an introduction designed to present you with a broad overview of the *New Claims for Pension* Module.

Section 2 of this guide contains the Module Master Planning Chart which is designed to provide you with the information you need to effectively plan the scheduling for the module. Notes and tips are also provided to let you know key instructional events and activities.

Section 3 of this guide contains a summary for the New Claims for Pension Module. You may use this to familiarize yourself with the module contents and also as a review for your students before they complete the posttests.

Who Will Take The Modules?

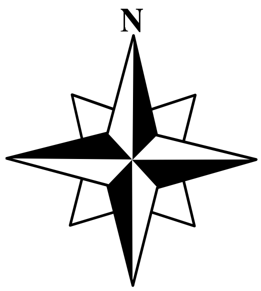
Students who take these modules are RVSRs who are preparing for rating duties involving rating new claims and who have successfully completed the *Rate an Original Claim for Pension* module.

Students who take this module should have either failed or opted not to take the module pretest.

> **Note:** The pretest is optional. Students who want to take the *New Claims for Pension* Module may choose to take the pretest, or may choose to go directly to the module.

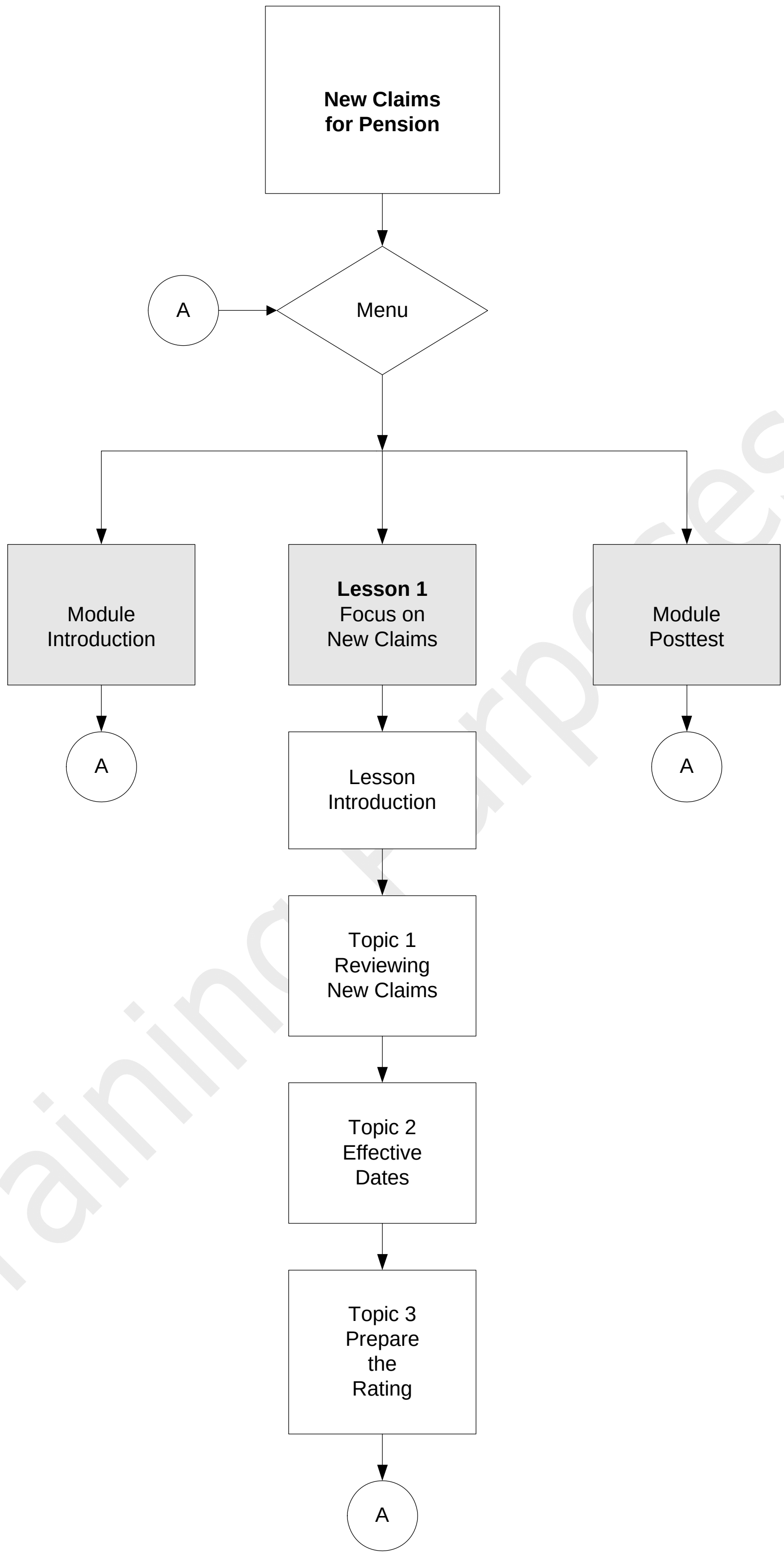
All students selected to take these modules should take each lesson and topic in sequence to ensure that he/she has (or gains) a comprehensive understanding of the content of the module.

Module Map



To get an overview of how the *New Claims for Pension* Module is laid out, take a look at the map on the following pages.

As you can see, the *New Claims for Pension* Module is comprised of one lesson with three topics. The students must take the topics in the order that they are presented.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Learning Objectives

The *New Claims for Pension* Module has one lesson that provides instruction on the requirements of the learning objective for the module.

The learning objective details the **action** to be taken (the task), the **conditions** under which the task is to be performed, the **standards** to be met in order to successfully perform the task, and the **time** it should take to complete the task on the job.

Student performance will be assessed based on their ability to meet these standards. It is critical that students understand what is expected of them throughout training. For this reason, they will be asked to read the learning objective at the beginning of the module.

Students will be directed to contact you if they have any questions about what they will be learning and doing in the lesson. Therefore, you should be thoroughly familiar with the objectives, including each of their components and what they mean for the students. Or, identify the person to whom you may refer any specific technical or task-related questions. Ensure this person is available to provide any one-on-one training and/or feedback that may be necessary.

Test Design

Tests are designed to evaluate the students in an authentic or "real life" setting using cases or scenarios. The scenarios and evidence used in the tests are derived from actual claims for pension that have been submitted to the VBA. For testing purposes, the cases have been sanitized and modified. These modifications include replacing actual names and other identifying information with fictitious names and information to protect privacy, and adding or removing elements and issues of the case to ensure appropriate criteria are tested. The cases and answer keys have been reviewed and adjusted by subject matter experts (SMEs) in the VBA and approved by C&P in an effort to remove unintentional errors or issues not relevant to the criteria being tested.

New Claims for Pension tests consist of three parts:

Part 1
Various scenarios which the students must review and answer based on the Answer Sheet.

Part 2
Questions based on case information which the student must review and answer on the Answer Sheet.

Part 3
Cases for which students must determine a rating decision (final or deferred). Students will be required to use the Pension Rating Template.

Pension Rating Template and TPSS Rating Text

Students will prepare rating decisions using the Pension Rating Template to show they can perform the task.

The Pension Rating Template is an electronic file that is formatted to look like a rating decision. It has fields in which students must enter specific information about the claim. Students are to complete the Pension Rating Template by typing in the necessary information for each field after they have reviewed and evaluated the case.

Students will use the TPSS Rating Text to copy and paste the appropriate wording for each issue into the Reasons for Decision section of the Rating Template.

Both the Pension Rating Template and the TPSS Rating Text are available from Rating Tools under the Tools button within the module.

Students must demonstrate they can perform the task of preparing a rating decision for a new claim for disability pension—they just won't be using RBA2000 to do it. **It will be up to the Stations to provide training after TPSS to teach and practice actual generation of the rating document using RBA2000.**

Be sure to collect ALL completed rating decisions (both paper-based and electronic) from the students after discussion.

Module Test Procedures

Before Students take a Module Posttest:

- Have students contact you prior to taking the posttest so you can make sure they do not have any unanswered questions.
- Tell students they can use whatever notes they have taken or documents they have printed. They can use any resources they have, but they are not allowed to discuss questions with each other.
- Let students know they must contact you after they have completed the posttest.

There are two variants of the module posttest available. When administering the module posttest you will assign test variants to the students. Instruct the students to take Variant 1 first and then Variant 2, if needed. You may direct a student to take a different variant if he or she fails one variant or when test security may be compromised.

Test Scoring

Score these tests using the scoring instructions answer keys. The students must pass ***all parts*** of the test.

Refer to the test scoring instructions/answer keys for more information on the passing criteria for each module posttest. You can access the test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1380393.

Provide feedback to students. If a student does not pass a test, you must revisit the appropriate section in the module with the student. Once remediation has been conducted, administer a second variant of the test to the student and repeat the scoring and feedback process.

While you do need to administer the module test, you do not need to enter the test scores. After you score the test answer sheets and provide feedback to the students, you will email the test scores to the TPSS Help Desk (CDSHelpDesk@vba.va.gov). You can email the scores for multiple students at the same time. The email must include the following information for each student: student's TMS student identifier/TMS user name, module name, test name, test score of P or F, and test date.

TPSS Equipment

Your students will be working in groups at a single computer to complete the lessons. However, they will need access to separate computers for tests. The computers should be set up with dual monitors so that the students can open the online cases and look at other reference material during the training and testing.

In the Module Introduction, the students are provided with the following information about opening instructional cases with or without dual monitors:

Dual Monitors

"If you have dual monitors, when you select a case using the button, it will open in a new window. You may move it to the other monitor and expand it to fit the entire screen.

If you do not have dual monitors, when you select a case using the button, it will open in a new window, and you must navigate between the case and the courseware by holding down the Alt key and the Tab key at the same time. Using the Alt-Tab feature allows you to toggle back and forth.

Note: The cases have bookmarks for each form, letter, etc., within the case. You may select a bookmark to advance to that document within the case. Or you may scroll up and down throughout the case by using the scrollbar on the right-hand side of the window.

Throughout this module, you will be prompted when to open a given case and when to close it."

You may want to reinforce this information during your briefing and make sure when they come to their first online case, they understand what to do with it.

Publications

Ensure that students have access to pension-relevant reference materials, such as:

- M21-1MR, Part III
- 38 CFR, Parts III and IV
- Court of Appeals for Veterans Claims (CAVC) decisions/decision assessment documentation
- VBA Circulars, "Fast Letters," Training Letters, and Policy Letters
- Merck Manual
- Dorland's or comparable Illustrated Medical

Dictionary
- Diagnostic and Statistical Manual of Mental Disorders (DSM) - latest edition

Reporting problems accessing Basic Ratings TPSS

courseware

To report problems with the computer courseware:

- Contact your local IRM support. If your local IRM support is not available or does not know how to troubleshoot the problem,

- Contact the VBA TPSS Help Desk!

Email: CDSHelpDesk@vba.va.gov

- Connect to the Intranet!

Access the comments database web form, go to the Compensation Service Home Page (http://cptraining.vba.va.gov). From here, select the "Training" button, then the TPSS button. On the page that appears, select the comments feedback form.

Section 2 – Module Master Planning Chart

New Claims for Pension

Note: The estimated range of time required to complete the online content, including cooperative exercises is 1 hour, 45 minutes to 2 hours, 45 minutes. The Module Posttest times ranged from 1 hour, 30 minutes to 2 hours, 30 minutes. The estimated total student course time ranges from 3 hours, 15 minutes to 5 hours, 15 minutes.

This Module Master Planning Chart is based on the average time that students required during the validation of this module. Be aware that the actual times for students may be more or less than the time listed here.

- Estimated total Student time for online course and a single version of the Module Posttest: **4 hours, 15 minutes**
- Estimated total Student time for Module (aka, total "seat" time): **5 hours, 10 minutes**
(**Note:** All estimated total "seat" times for modules include module orientation, the online courseware and cooperative exercises, if applicable, along with a single version of the Module Posttest and feedback.)
- Estimated total Training Coordinator Time for administrative duties: **2 hours, 30 minutes**
(**Note:** This total includes the additional time required by the TC to perform briefings, feedback, and any administrative duties such as grading tests and emailing TPSS Help Desk, i.e., those shaded line items that are specifically TC times only. Total time accounts for administration of a single version of the Module Posttest. Module Pretest preparation and grading is not included in the total. Although the TC is listed as personnel for all of the online lessons and all tests, the TC does not have to be present for the entire time the students are working in a lesson or taking a test. The TC may be working with other students or even performing other duties while students are working in TPSS. The TC needs to be available to answer questions as needed. That time will vary depending on how familiar with TPSS the students are.)

<table>
<tr><th colspan="2">Duration</th><th rowspan="2">Activity</th><th rowspan="2">Notes/Tips</th></tr>
<tr><th>hrs</th><th>min</th></tr>
<tr><td></td><td>15</td><td>Module Pretest Preparation</td><td>Includes giving student access to the New Claims for Pension Module in TMS.</td></tr>
<tr><td>2</td><td>00</td><td>Module Pretest (optional)</td><td>Conducted sometime prior to Day 1 of the training.</td></tr>
<tr><td></td><td>45</td><td>Module Pretest Grading</td><td>Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.</td></tr>
<tr><td></td><td>30</td><td>Administrative Functions</td><td>Includes emailing TPSS Help Desk with Module Pretest results, if applicable, assigning student privileges, notifying students of course schedule, and preparing a briefing</td></tr>
<tr><td></td><td>30</td><td>Orientation/Briefing</td><td>Includes setting up students' workstation. Ensure students can log into the courseware, navigate through the course using the buttons and prompts, and understand what on-line "Tools" are available to help.</td></tr>
<tr><td></td><td>15</td><td>Module Introduction</td><td>Students read the module objective. Students are introduced to lessons contained in the module.</td></tr>
<tr><td>2</td><td>00</td><td>Lesson 1</td><td>Introduction – Students will read lesson objective(s)
Topic 1 – Reviewing New Claims
Topic 2 – Effective Dates
First Cooperative Exercise of this module. Students will review four case scenarios to determine the effective date for each scenario.
Topic 3 – Prepare the Rating Decision
Cooperative Exercise - Students will prepare a rating decision using the Pension Rating Template and the claims folder for Luther P. Leland.</td></tr>
</table>

Duration		Activity	Notes/Tips
hrs	min		
	25	**Module Posttest Variant 1 Briefing**	Includes reviewing results of any cooperative exercises and ensuring that students are ready to take the test. Includes assigning a test variant to each student.
2	00	**Module Posttest Variant 1**	Students access the test online and turn in any printed documents to TC for scoring.
	45	**Module Posttest Variant 1 Grading**	Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.
	15	**Module Posttest Variant 1 Feedback**	Feedback times will vary depending on the number of items a student missed. If a student fails the Module Posttest, you must provide remediation until the student feels confident enough to take a variant of the Module Posttest. At that time, you will administer the variant in the same way you administered the Module Posttest and provide feedback based on the student's results of the variant.
	15	**Module Posttest Variant 2 Briefing**	Includes reviewing results of any cooperative exercises and ensuring that students are ready to take the test. Includes assigning a test variant to each student.
2	00	**Module Posttest Variant 2 (If applicable)**	Students access the test online and turn in any printed documents to TC for scoring.
	30	**Module Posttest Variant 2 Grading**	Scoring instructions and answer keys can be accessed in the VBA Learning Catalog.
	15	**Module Posttest Variant 2 Feedback**	If a student fails the variant of the Module Posttest, you must provide remediation until the student can demonstrate proficiency in the task.

Duration		Activity	Notes/Tips
hrs	min		
	15	**Email TPSS Help Desk Based on Module Test Results**	

Section 3 – Module Summary

New Claims for Pension

Remember that new claims are independent of any prior evidence and are based on the current medical evidence and not the evidence used to dispose of the earlier claim. Therefore new and material evidence is never a consideration in a new claim for pension. A new rating is not required when pension was previously terminated for non-wage income. A rating decision is required for a new claim if entitlement was previously established without a rating, the previous rating denied entitlement or there was a break in entitlement due to wage income.

Veterans age 65 or older, receiving Social Security or in a nursing home, are presumed to be permanently and totally disabled and a rating is not required. Review the application to make certain the Veteran's income and net worth do not exceed allowable limits. Check to see if there is already sufficient medical evidence in file to determine entitlement to pension and if not, develop for medical evidence and a VA exam, if needed.

Remember that you can rate the claim on partial evidence if there is enough evidence to grant pension. Entitlement to pension is based on service-connected and nonservice-connected disabilities. At least one nonservice-connected disability is required in combination with service-connected disabilities before pension may be granted. The disabilities must be permanent in that they are reasonably certain to continue for the entire life of the Veteran. If the Veteran does not meet the schedular criteria for pension, extra-schedular entitlement may be considered. Future examinations should be rarely scheduled.

For pension claims received after October 1, 1984, the effective date will generally be the date of receipt of claim. However, entitlement to retroactive benefits may be established for Veterans who are too disabled to immediately apply for benefits. A qualifying disability is a disability not due to willful misconduct that would make a Veteran too disabled to apply for benefits and it must prevent the Veteran from filing for at least 30 days. The Veteran has a one year time limit from the date he/she became too disabled to file, in which to submit the claim. Entitlement could then be established from the date the Veteran became permanently and totally disabled. The effective date for entitlement to an increased rate of pension such as SMP will generally be the date of receipt of claim or the date entitlement arose, whichever is later.

To successfully complete the task of rating a new Disability Pension claim, you must formalize the rating. All ratings must contain the issues reviewed, evidence reviewed, complete rationale for the decision, and a conclusion to include supporting data.

A complete rationale for all issues and decisions made must be provided while rating the claim. Diagnostic codes for each disability listed as an issue, individual percentage evaluations for each disability, and combined evaluations must also be included.