

# **Training Coordinator's Module Guide for Rate an Original Claim for Disability Pension**



November 5, 2013

**For Training Purposes Only**

**Section 1 - Course Materials**  
Training Coordinator’s Module Guide for  
*Rate an Original Claim for Disability Pension*

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## **Section 1 - Introduction**

### **Introduction**

Welcome to the *Rate an Original Claim for Disability Pension* Training and Performance Support System. Due to the length of the module title, future references may be shortened to Pension Module or Pension. Please read this Module Guide in its entirety. Feel free to highlight certain portions or write down notes as you read through this document.

Within these pages, you will find the information you need to set up and implement this module successfully.

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

**Section 2** contains the Module Master Planning Chart which lays out the instructional activities and course events including time and resource requirements.

**Section 3** contains Lesson Summaries for you to review with the students before they begin the Module Posttest. You may use these summaries to familiarize yourself with the module contents and also as a review for your students before they complete the posttests.

**Note:** To evaluate student performance and answer any student questions, you must either:

- (1) Be thoroughly familiar with the task: Rate an Original Claim for Disability Pension.  
*or*
- (2) Identify the Subject Matter Expert (SME) 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 are necessary.

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**Module Overview**

This module is entitled *Rate an Original Claim for Disability Pension*. This module is part of the Basic Ratings Course. It contains the following seven custom-designed, computer-based lessons with several case-based interactive training exercises:

- Lesson 1** – Verify Requirements for Rating
- Lesson 2** – Evaluate Evidence
- Lesson 3** – Assign Disability Rating
- Lesson 4** – Determine Eligibility for Pension
- Lesson 5** – Develop Pension Cases
- Lesson 6** – Determine Entitlement to Inferred Issues/Ancillary Benefits
- Lesson 7** – Prepare the Rating Decision

**Who Will Take This Module?**

The target population for this module consists of entry level RVSRs, usually with several years of experience in Adjudication. Students taking the Pension Module should have completed the Prerequisite Training Course or its equivalent.

**Note:** The Prerequisite Training Course, which covers medical terminology and the Rating Schedule, is not graded. Students should complete this course, or a local office equivalent, prior to taking the Basic Ratings Course.

All students selected to take this module should take each lesson from start to finish in sequence, to ensure that he/she has (or gains) a comprehensive understanding of rating an original claim for Disability Pension.

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

**Note:** The pretest is optional. Students who want to take the Pension Module may choose to take the pretest, or they may choose to go directly to the lessons.

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**TPSS Materials**

Everything that your students need to complete the Pension Module is available to them within the module online. Once you provide the students with a proper briefing, your role, other than monitoring their progress throughout and conducting test briefings, will be to score the test answer sheets that they print from the system and give them feedback.

You can access the test scoring instructions and answer keys from the VBA Learning Catalog, where you found this Module Guide. Search for TMS Item #1380381.

**TPSS Equipment**



*Dual Monitors*

The computers for your students should be set up with dual monitors so that they 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:

“As you work your way through the lessons, you will use online cases that are based on actual Veterans' cases which have been altered for training purposes and to protect the privacy of the individuals involved with the claim.

You will access these online cases by clicking the Cases button in the upper part of the screen.

- 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 toggle between the case and the courseware.

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.

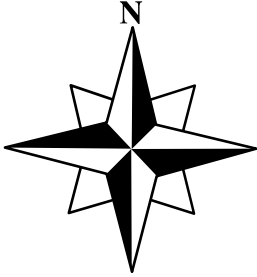
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Throughout this module, you will be prompted when to open a given case and when to close it.”

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.

**Module Map**

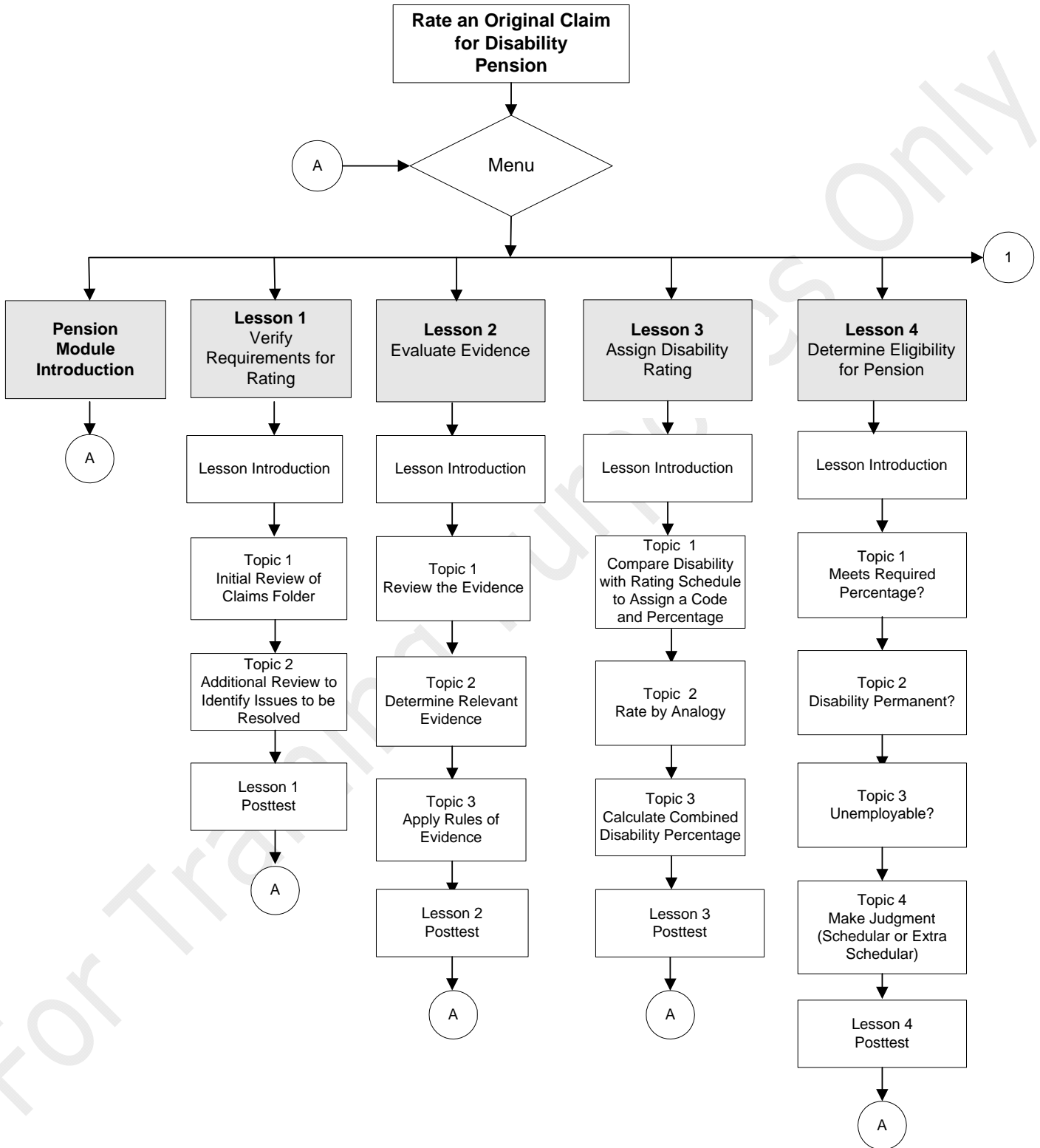


To get an overview of how the module is laid out, take a look at the Module Map that follows.

As you can see, the Pension Module is comprised of seven lessons. The students must take the lessons in the order they are presented. A student may not proceed to the next lesson until they have successfully completed the previous lesson's posttest.

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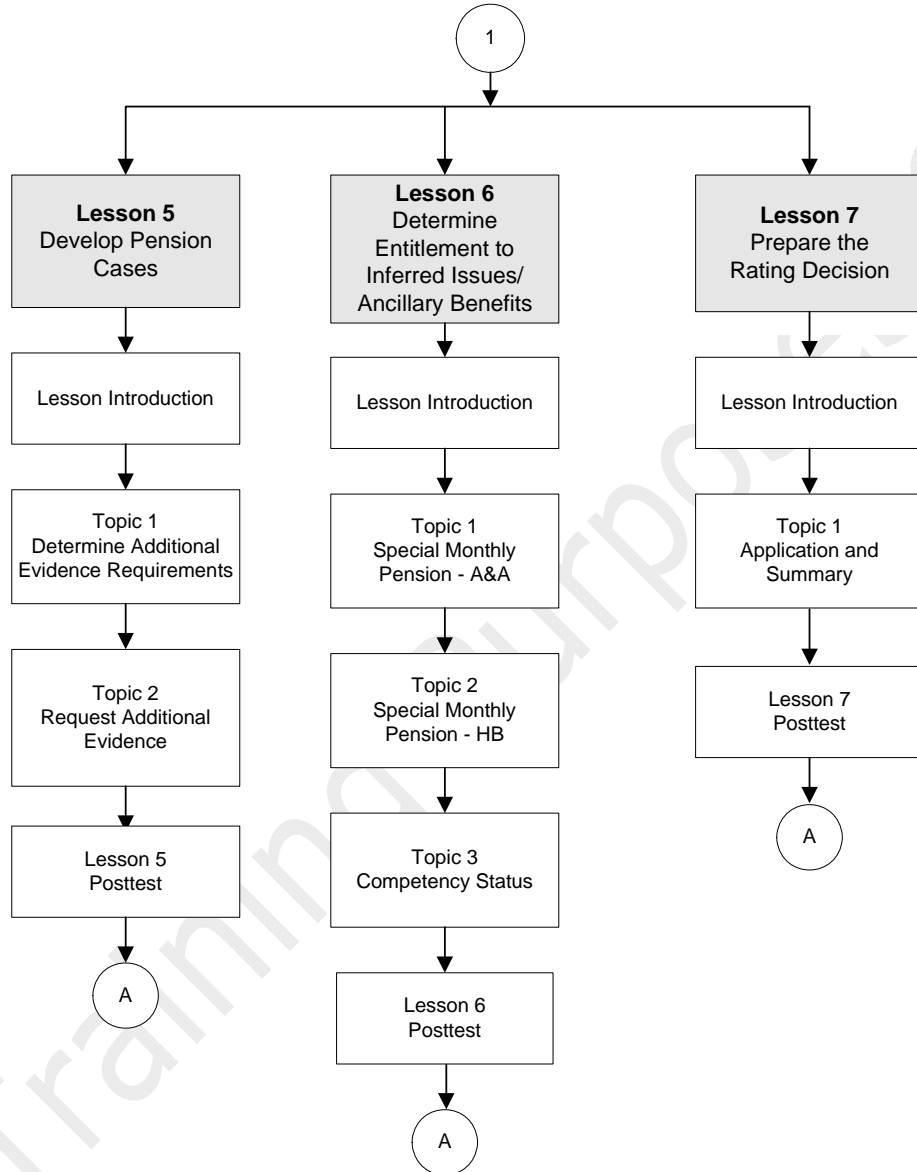
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Module Map (continued)





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**Pension Test Design**

The lesson posttests measure a portion of the entire rating process from reviewing the claims folder to preparing a rating decision. The Pension Module Pretest and Posttest each consist of five cases which the student must review and then rate (with a final or deferred decision). Students will be required to use the electronic Pension Rating Template.

**Module Pretest**

There are five cases in the module pretest. Students have the option to not take the module pretest. All the materials needed to administer and score the tests, including the cases, and test/scoring instructions and answer keys are available online.

The passing criteria for the Module Pretest is 80%. This means that students must correctly rate four out of the five cases. The passing criteria for the module pretest are provided in the test directions/answer keys which can be accessed in the VBA Learning Catalog. Search for TMS Item #1380381.

The cases in the module pretest are designed to assess the student's ability to perform the process of preparing the rating decision for a Disability Pension claim at the Basic Ratings level. Students need assume that the adjudication process is complete and the case is ready to rate.

While you do need to administer the module pretest, 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](mailto: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.

**Lesson Posttests**

Once students complete a lesson, they will be prompted by the computer to take the lesson posttest. There are two available variants of each lesson posttest. Instruct the students to take Variant 1 first and then Variant 2, if needed. If a student does not pass a lesson posttest, then the student must take that lesson posttest's variant

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**Note:** Your Training Coordinator's Guide offers tips and guidelines for providing test feedback, and prescribing remediation.

Because it is important to demonstrate the “building” process of rating cases, some cases will be revisited in subsequent lesson posttests. For this reason, it is important that the students have the correct answers for the lesson posttests. **You may want to have them write down the answers before proceeding to the next lesson posttest.**

**Important:** If it is necessary for a student to take a variant, you will need to ensure that the student has the answers to the pertinent cases. This will save the student from having to review the entire case(s) from scratch.

The passing criteria vary for each lesson posttest. Refer to the test scoring instructions/answer keys for more information. You can access the test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1380381.

**Important:** While you do need to administer the lesson test, you do not need to enter the lesson test scores.

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**Module Posttest**

As with the module pretest, there are five cases in the module posttest. All the materials needed to administer and score the tests, including the cases, and test/scoring instructions and answer keys are available online.

There are three variants of the module posttest. When administering the module posttest you will assign test variants to the students. Instruct the students to take Variant 1 first and then Variants 2 and 3, 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.

The passing criteria for the module posttest is 80%. This means that students must correctly rate four out of the five cases. 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 #1380381.

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](mailto: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.

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**Pension Rating  
Template and TPSS  
Rating Text**

Instead of generating a Rating Decision Document during the cooperative activities and at the lesson posttests, students will prepare rating decisions using the Pension Rating Template.

The Pension Rating Template is an electronic file that is formatted to look like a rating decision for a pension claim. It has fields where 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 evaluating a case for Disability Pension by preparing a rating decision -- they just won't be using RBA or RBA2000 to do it. **It will be up to the Regional Offices 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.**

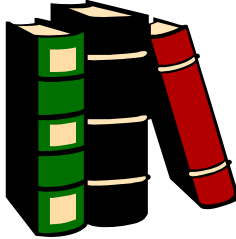
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### Resource Requirements

To successfully implement this training program, you will need a complete module package, which includes all of the materials described at the beginning of this Module Guide.

### Publications



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

- M21-1MR, Part III and V
- 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

### Contact Information

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](mailto: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.



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**Section 2 - Module Master Planning Chart**

The Module Master Planning Chart (beginning on the next page) is designed to provide you with the information you need to effectively plan the scheduling and resource requirements for this module.

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**Rate an Original Claim for Disability Pension**

The Module Master Planning Chart is designed to provide you with the information you need to effectively plan the scheduling and resource requirements for this module.

**Note:** The estimated range of time required to complete the online content, including cooperative exercises and a single version of the Lesson Posttests, is 15 hours to 25 hours. The Module Posttest times ranged from 3 hours, 30 minutes to 5 hours, 45 minutes. The estimated total student course time ranges from 18 hours, 30 minutes to 30 hours, 45 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: **25 hours**
- Estimated total Student time for Module (aka, total “seat” time): **29 hours**  
(**Note:** All estimated total “seat” times for modules include module orientation, the online courseware and cooperative exercises, if applicable, along with, when given, a single variant of the Lesson Posttest(s), feedback, and a single version of the Module Posttest and feedback.)
- Estimated total Training Coordinator Time for administrative duties: **13 hours**  
(**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 the TPSS Help Desk, i.e., those shaded line items that are specifically TC times only. Total time accounts for administration of a single variant of the Lesson Posttest(s), when given, and 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.)

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Duration		Activity	Notes/Tips Personnel
hrs	min		
	10	<b>Module Pretest Preparation</b>	Includes giving students access to <i>Rate an Original Claim for Disability Pension</i> in T MSS.
4	30	<b>Module Pretest</b>	Conducted sometime prior to Day 1 of the training.
1	00	<b>Module Pretest Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	30	<b>Administrative Functions</b>	Includes emailing the TPSS Help Desk with Module Pretest results, if applicable, updating materials, assigning student privileges, notifying students of course schedule, and preparing briefing.
	30	<b>Orientation/Briefing</b>	Includes setting up students with workstation and required materials. Ensure students understand logging into the course on the computer, understand how to navigate through the course using the buttons and prompts, and understand what online "Tools" are available to help.
	15	<b>Module Introduction (online)</b>	Includes Module Objective and Lesson Titles
1	00	<b>Lesson 1</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> – Initial Review of Claims Folder</li> <li>• <b>Topic 2</b> – Additional Review to Identify Issues to be Resolved - <b>First Cooperative Exercise</b> of this module. Students will be reviewing the claims folder for <b>Frank P. Hagen</b> to verify the requirement for Rating Activity action.</li> </ul>
	5	<b>Lesson 1 Posttest Variant 1 Briefing</b>	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.
	30	<b>Lesson 1 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 1 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 1 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.



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Duration		Activity	Notes/Tips
hrs	min		
	10	<b>Lesson 1 Posttest Variant 2 Briefing</b>	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.
	30	<b>Lesson 1 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.
	10	<b>Lesson 1 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 1 Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
2	30	<b>Lesson 2</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> – Review the Evidence</li> <li>• <b>Topic 2</b> – Determine Relevant Evidence - <b>Cooperative Exercise.</b> Students will be reviewing the claims folder for <b>Ralph Schmidt</b> to determine evidence that is relevant for rating the case.</li> <li>• <b>Topic 3</b> – Apply Rules of Evidence - <b>Cooperative Exercise.</b> Students will be reviewing the claims folder for <b>Peter P. Winne</b> and applying the rules of evidence.</li> </ul>
	10	<b>Lesson 2 Posttest Variant 1 Briefing</b>	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.
	30	<b>Lesson 2 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 2 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 2 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	10	<b>Lesson 2 Posttest Variant 1 Briefing</b>	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.

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Duration		Activity	Notes/Tips Personnel
hrs	min		
	30	Lesson 2 Posttest Variant 2	Students access the test online and turn in any printed documents to TC for scoring.
	10	Lesson 2 Posttest Variant 2 Grading	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	Lesson 2 Posttest Variant 2 Feedback	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
4	30	Lesson 3	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> – Compare Disability with Rating Schedule to Assign a Code and Percentage - <b>Cooperative Exercises.</b> Students will use the Rating Schedule from 38 CFR Part 4 to locate the diagnostic codes and percentages for given case scenarios.</li> <li>• <b>Topic 2</b> – Rate by Analogy - <b>Cooperative Exercises.</b> Students will use the Rating Schedule from 38 CFR Part 4 and medical references to locate the diagnostic codes and percentages for given disabilities.</li> <li>• <b>Topic 3</b> – Calculate Combined Disability Percentage - <b>Cooperative Exercise.</b> Students will calculate the combined disability percentage, apply the combined rating table, bilateral factor and the amputation rule for given case scenarios.</li> </ul>
	10	Lesson 3 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.
	30	Lesson 3 Posttest Variant 1	Students access the test online and turn in any printed documents to TC for scoring.
	30	Lesson 3 Posttest Variant 1 Grading	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	Lesson 3 Posttest Variant 1 Feedback	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	10	Lesson 3 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.

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Duration		Activity	Notes/Tips
hrs	min		
	30	<b>Lesson 3 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.
	10	<b>Lesson 3 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 3 Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
<b>4</b>	<b>00</b>	<b>Lesson 4</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1 – Meets Required Percentage? - Cooperative Exercise.</b> Students will use the Combined Ratings Table from 38 CFR Part 4 to calculate the combined disability rating and determine whether the claimant meets the required percentage for schedular requirements or given case scenarios.</li> <li>• <b>Topic 2 – Disability Permanent? - Cooperative Exercise.</b> Students will determine if the medical evidence describes a claimant that is permanently and totally disabled for given Claims folders for <b>Peter Winne, Ralph Schmidt and Louis Edwards.</b></li> <li>• <b>Topic 3 – Unemployable? - Cooperative Exercise.</b> Students will determine if claimants are unemployable given case scenarios.</li> <li>• <b>Topic 4 – Make Judgment (Scheduler or Extra-Scheduler) - Cooperative Exercise.</b> Students will determine if claimants should be granted pension based on schedular or extra-schedular requirements given case scenarios.</li> </ul>
	10	<b>Lesson 4 Posttest Variant 1 Briefing</b>	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.
	1	<b>Lesson 4 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 4 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 4 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide

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Duration		Activity	Notes/Tips Personnel
hrs	min		
			feedback based on the student's results of the variant.
	10	<b>Lesson 4 Posttest Variant 1 Briefing</b>	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.
1	30	<b>Lesson 4 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.
	10	<b>Lesson 4 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 4 Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
1	30	<b>Lesson 5</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> - Determine Additional Evidence Requirements</li> <li>• <b>Topic 2</b> – Request Additional Evidence - <b>Cooperative Exercise.</b> Students will identify additional requirements and prepare appropriate documentation for a given claims folder for <b>Greg Tyle.</b></li> </ul>
	10	<b>Lesson 5 Posttest Variant 1 Briefing</b>	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.
1	00	<b>Lesson 5 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 5 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 5 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	10	<b>Lesson 5 Posttest Variant 1 Briefing</b>	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.
1	00	<b>Lesson 5 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.

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Duration		Activity	Notes/Tips Personnel
hrs	min		
	10	<b>Lesson 5 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 5 Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
2	00	<b>Lesson 6</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> – Special Monthly Pension (Aid and Attendance)</li> <li>• <b>Topic 2</b> – Special Monthly Pension (Housebound) - <b>Cooperative Exercise.</b> Students will review the claims folders for <b>Ralph P. Schmidt and Frank Hagen</b> to determine the appropriate rating for disability(ies) and determine which ancillary benefits (if any) are due to claimants.</li> <li>• <b>Topic 3</b> – Competency Status</li> </ul>
	10	<b>Lesson 6 Posttest Variant 1 Briefing</b>	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.
1	30	<b>Lesson 6 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 6 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 6 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	10	<b>Lesson 6 Posttest Variant 1 Briefing</b>	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.
1	30	<b>Lesson 6 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.

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Duration		Activity	Notes/Tips Personnel
hrs	min		
	10	<b>Lesson 6 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 6 Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
<b>1</b>	<b>30</b>	<b>Lesson 7</b>	<ul style="list-style-type: none"> <li>• <b>Lesson Introduction</b> – Students will read the lesson objective(s).</li> <li>• <b>Topic 1</b> – Application and Summary - <b>Cooperative Exercise</b>. Students will review the claims folders for <b>Peter P. Winne and Frank P. Hagen</b> and prepare a rating decision for each using the electronic Pension Rating Template file.</li> </ul>
	10	<b>Lesson 7 Posttest Variant 1 Briefing</b>	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.
<b>2</b>	<b>00</b>	<b>Lesson 7 Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
	30	<b>Lesson 7 Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson 7 Posttest Variant 1 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, you must provide remediation to the student until the student feels confident enough to take a variant of the Lesson Posttest. At that time, you will administer the variant to the student in the same way you administered the Lesson Posttest and provide feedback based on the student's results of the variant.
	10	<b>Lesson 7 Posttest Variant 1 Briefing</b>	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.
<b>2</b>	<b>00</b>	<b>Lesson 7 Posttest Variant 2</b>	Students access the test online and turn in any printed documents to TC for scoring.
	10	<b>Lesson 7 Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	10	<b>Lesson7 Posttest Variant 2</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If the

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Duration		Activity	Notes/Tips
hrs	min		
		<b>Feedback</b>	student who failed the first version of the Lesson Posttest also fails the variant, you may allow the student to progress to the next lesson. Make arrangements to provide additional assistance to the student before he/she takes the Module Posttest.
	<b>15</b>	<b>Module Posttest Variant 1 Briefing</b>	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.
<b>4</b>	<b>30</b>	<b>Module Posttest Variant 1</b>	Students access the test online and turn in any printed documents to TC for scoring.
<b>2</b>	<b>00</b>	<b>Module Posttest Variant 1 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	<b>30</b>	<b>Module Posttest Variant 1 Feedback</b>	<b>Note:</b> 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 the second variant of the Module Posttest. At that time, you will administer variant 2 of the Module Posttest in the same way you administered variant 1 of the Module Posttest and provide feedback based on the student's results of the variant.
	<b>10</b>	<b>Module Posttest Variant 2 Briefing</b>	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.
<b>4</b>	<b>30</b>	<b>Module Posttest Variant 2, (as necessary)</b>	Students access the test online and turn in any printed documents to TC for scoring.
<b>2</b>	<b>00</b>	<b>Module Posttest Variant 2 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	<b>30</b>	<b>Module Posttest Variant 2 Feedback</b>	<b>Note:</b> Feedback times will vary depending on the number of items a student missed. If a student fails the second variant of the Module Posttest, you must provide remediation until the student feels confident enough to take the third variant of the Module Posttest. At that time, you will administer variant 3 of the Module Posttest in the same way you administered variant 2 of the Module Posttest and provide feedback based on the student's results of the variant.
	<b>10</b>	<b>Module Posttest Variant 3</b>	Includes reviewing results of any cooperative exercises and ensuring that students are ready to

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Duration		Activity	Notes/Tips Personnel
hrs	min		
		<b>Briefing</b>	take the test. Includes assigning a test variant to each student.
4	30	<b>Module Posttest Variant 3</b> , (as necessary)	Students access the test online and turn in any printed documents to TC for scoring.
2	00	<b>Module Posttest Variant 3 Grading</b>	Scoring instructions and answer keys are in the VBA Learning Catalog.
	30	<b>Module Posttest Variant 3 Feedback</b>	<b>Note:</b> If a student fails Variant 3 of the Module Posttest, you must provide remediation until the student can demonstrate proficiency in the task.
	15	<b>Emailing TPSS Help Desk Based on Module Posttest Results</b>	



## Section 3 - Lesson Summaries

**Training Coordinator Notes:**

After the students have completed a Lesson Posttest, review the entire lesson by reading the following summary (or your own personalized version). Respond to any questions they may raise.

After you have presented the lesson review, if a student does not feel ready to continue to the module posttest, allow him or her some time to review specific topics or issues within the appropriate test.

Tell students:

*“Now that you have completed the module, you should find it easier to understand the multiple actions involved in rating a claim for Disability Pension. There are many Pension regulations that you must check and recheck in the course of the rating process. And no detail, regardless of how insignificant it may seem on the surface, can be overlooked. Remember that this practice is mandated by law in the Duty to Assist doctrine.”*

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**Lesson 1 -  
Verify  
Requirements  
for Rating**

Disability Pension is a benefit based on need stemming from a Veteran’s inability to earn a reasonable livelihood because of a permanent and total disability. Pension is only available to Veterans with service performed in time of war. Before you begin to process a claim for Pension, you must examine the claims folder and determine whether the claim meets the basic requirements for a Pension rating.

First, verify that the correct folder accompanies the claim, and that the contents are all date-stamped. Also, make sure that VA Form 21-526 is present and completely filled out. The form must include the Veteran’s:

- Social Security number,
- active service dates,
- treatment notes for claimed disabilities, and
- signature.

The claims folder should also contain information concerning the claimant’s income and net worth. If any of these items are missing, return the claim to the VSR for further development.

Next, make sure that the Veteran meets the terms of military service detailed in 38 CFR 3.2 and 3.3.

Finally, examine any previous rating decisions in the case file. Determine whether there was any previous development on the case, and if so, whether there are any outstanding deferred issues.

**Lesson 2 -  
Evaluate  
Evidence**

To determine if the claimant is entitled to pension, you must evaluate the evidence contained in the claimant's folder. Is the evidence in the claims folder adequate for rating? Is it relevant? Is it credible?

**Adequate** medical exams are critically important, because all the medical conclusions you arrive at regarding a pension claim must be supported by evidence contained in the claimant's folder. For medical evidence to be full and complete, it must describe all listed conditions and provide clinical findings to support the diagnosis as required by the Rating Schedule. Any evidence that does not meet that requirement is inadequate.

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Remember that you should not deny or reduce a benefit based on inadequate medical evidence. Instead, under your Duty to Assist, you should:

- Secure additional reports of treatment at VA facilities and information from other federal departments or agencies
- Seek additional evidence from non-VA medical providers identified by the claimant
- Request a thorough VA medical exam

Medical evidence is of primary importance for assigning evaluations. However, non-medical evidence such as nursing home administrative reports and lay statements from family, friends, and co-workers may support the medical evidence by providing significant insight into the degree and type of disability. The non-medical statements provided by friends and family members may also be of probative value, suggesting that further development may be required.

Each piece of evidence in a claims folder may or may not be **relevant**. For Pension, relevant evidence describes the claimant's disabilities and establishes the claimant's unemployability status. You should not disregard any additional information that you believe is relevant to determining disabilities, unemployability or inferred issues.

You determine whether evidence is **credible** based on the credentials of the person reporting the information. Credible medical evidence comes from a qualified medical practitioner or specialist. Credible lay evidence comes from individuals, such as family members and close associates, who are in a position to observe the claimant on a daily basis.

**Lesson 3 -  
Assign  
Disability  
Rating**

Disability percentage ratings represent the average impairment in relation to earning capacity. When you assign disability ratings for Pension claims, remember that:

- You assign diagnostic codes to all disabilities, whether they are granted or denied, service- or nonservice-connected.

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- You assign a 0% evaluation for a disability when the requirements for a comprehensive evaluation are not met, and the Rating Schedule does not provide a 0% evaluation for that disability's diagnostic code.
- You always use the higher of two possible evaluations for a disability.
- You always resolve an evaluation in the Veteran's favor, when there is reasonable doubt about the severity of the disability.

Sometimes, you will not be able to find a specific rating code in the Rating Schedule for a disability. In those cases, you will create a **rating by analogy**. You will find a closely related disability in the Rating Schedule, compare the evidence of record to the Rating Schedule requirements for that disability, and assign a code and percentage for the analogous rating.

When you rate a disability by analogy, you assign a built-up diagnostic code to the disability. Built-up codes consist of two diagnostic codes separated by a hyphen. The first two digits of the first diagnostic code represent the part, system, or body involved and the second two digits are "99." Take the second diagnostic code from the Rating Schedule: use this second code to identify the diagnostic criteria used to evaluate the claimed disability.

As you assign disability ratings for pension claims, remember to apply the Amputation Rule and the Bilateral Factor to your ratings.

The **Amputation Rule** says that when you combine ratings for disabilities from the same extremity, the evaluation cannot exceed the rating that would be assigned to that extremity if it were amputated.

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**Lesson 4 -  
Determine  
Eligibility for  
Pension**

The **Bilateral Factor** compensates Veterans for the loss of function in the two upper or two lower extremities. This includes the arms (hand, elbow, shoulder), legs (foot, knee, thigh), and paired skeletal muscles. With the Bilateral Factor, the Veteran is compensated by qualifying for an extra 10% rating. After you combine the ratings for the paired disabilities, you will add 10% of that value before carrying out any more combinations.

All claimants who are eligible for Pension and unable to find or keep a substantially gainful occupation because of their permanent disabilities will be rated as permanently and totally disabled.

To be eligible for Pension, a claimant must have the following disability ratings, derived from one or both upper and lower extremities, from a single etiology or accident, or from a single body system:

- A single disability rated at no less than 60%
- Two or more disabilities, one rated at no less than 40%, with a combined rating of at least 70%

Remember that you cannot grant permanent and total disability ratings for disabling conditions that are the result of a Veteran's own willful misconduct. Also, you will not grant permanent and total disability ratings if a person is incapacitated from an acute infectious disease, an accident, or an injury, unless that disability is of a type that is not likely to improve with time or treatment.

You will consider a claimant unemployable if his or her age or disability prevents him or her from seeking or retaining sufficiently gainful employment. A claimant with marginal employment -- where he or she works less than one-half the usual hours or receives less than one-half of the current community wage -- may still be considered unemployable.

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A claimant is not unemployable if he or she is simply unemployed: when age or disability does not prevent him or her from finding or retaining a job. When you determine a claimant’s employability, be sure to take into account the claimant’s education and occupational background, his or her suitability for retraining, and the circumstances of his or her most recent employment.

Finally, if a claimant is basically eligible for Pension, but does not meet the schedular requirements, you may grant a pension based on extra-schedular requirements. Consider granting an extra-schedular pension when the claimant does not meet the disability percentage requirements, but is clearly permanently and totally disabled by his or her disabilities. In such cases, you will need to obtain your Service Center Manager’s approval before you issue a final rating; make sure your rating decision clearly documents the reasons for granting an extra-schedular rating.

**Lesson 5 -  
Develop  
Pension Cases**

When rating Pension cases, your goal is to determine a claimant’s current level of disability. As a result, you won’t need as much historical evidence about a claimant for a Pension claim as you would for a Compensation claim. You will concentrate on current medical records and evidence of how the disability occurred.

The primary sources of evidence for Pension claims will be VA records and private medical records, but you may also need to consider Social Security and vocational training records. As with Compensation claims, fully descriptive medical examinations are required to accurately apply the Rating Schedule to Pension claims. Review the evidence in the claims folder, and note any deficiencies:

- Chronological gaps in treatment records
- Inconsistencies (i.e. referenced letter is not attached to the report)
- Missing clinical evidence
- Lack of sufficient evidence to apply the Rating Schedule

Because the focus of Pension claims is on determining a claimant’s current level of disability, chronological gaps in the treatment record are less critical for Pension claims than for Compensation claims.

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You must complete a deferred rating sheet, VA Form 21-6789, if you receive a claim that requires additional evidence for development. Once you have deferred the rating, there are three different types of exams you can order to help you obtain additional evidence:

- **General medical** exams contain a full report of complaints and functional impairments. This is the preferred type of exam for Pension claims. A complete general medical examination will usually provide a basis for resolving any future claims.
- **Aid and Attendance** (A&A) exams determine if a claimant is so helpless as to require the aid of another person to perform the personal functions required in everyday living. The A&A exam also provides a basis for determining if the Housebound benefit may be paid.
- **Specialist** exams provide information on any specialty areas for all body systems. Request specialist exams only if they are considered essential for rating purposes. Audiometric (hearing) or psychiatric exams are required when those conditions are claimed or noted in other evidence.

**Lesson 6 -  
Determine  
Entitlement to  
Inferred Issues/  
Ancillary  
Benefits**

When you rate a claim for Pension, you must also evaluate the claim for possible ancillary benefits, such as Aid and Attendance (A&A) or Housebound (HB) benefits, or for competency issues.

Any time you rate a single disability at 100%, you must also consider the claimant's entitlement to A&A benefits. Entitlement to A&A requires that a claimant be so helpless that he or she requires the aid of another person to perform the personal functions required in everyday living. Two types of criteria must be considered when you determine a claimant's entitlement to A&A benefits:

- **Statutory criteria** automatically entitle the claimant to A&A benefits. A claimant is entitled to A&A if he or she is either blind or resides in a nursing home.

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- **Factual criteria** entitle the claimant to A&A benefits if a sufficient need is shown: the claimant cannot dress, keep clean, or feed him or herself without assistance; the claimant needs constant help adjusting an orthopedic appliance; the claimant is incapable of protecting him or herself from the hazards of daily life, or is totally bedridden.

Claimants who are not eligible to A&A may be entitled to HB benefits. A claimant is entitled to HB benefits if he or she is unable to leave his or her residence, but does not have a regular need for skilled care. You must consider three types of criteria when you evaluate a claimant's case for HB benefits:

- **Statutory criteria** entitle the claimant to HB benefits if he or she has a single, permanent disability rated at 100%, and additional disability(ies) rated at 60% or more, with each rated disability involving a different bodily system.
- **Factual criteria** entitle the claimant to HB benefits if he or she has a single, permanent disability rated at 100% and the disability is so severe as to confine the claimant to his or her dwelling. (Factual HB cases are uncommon.)
- **Extra-schedular cases** allow entitlement to HB benefits even if the claimant's disability rating is less than 100%, as long as his or her disability is so severe as to confine the claimant to his or her dwelling. (Extra-schedular HB cases are very uncommon.)

Finally, the VA defines a mentally incompetent person as one who, because of injury or disease lacks the mental capacity to manage his or her own affairs, including disbursement of funds without limit. You have the sole authority to determine a claimant's competency status for VA purposes. You should consider competency as an issue in any case where the evidence raises questions about the claimant's ability to manage financial affairs.

Medical evidence is the best type of evidence supporting a rating of incompetency. It must be clear and convincing, leaving no doubt as to the claimant's ability to conduct his or her affairs. It must also be provided by the proper medical authority.



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**Lesson 7 –  
Prepare the  
Rating Decision**

Incompetency claims require the following due process considerations:

- Notification of proposed action
- List of facts and evidence supporting a finding of incompetence
- The effect of such findings on payment of VA benefits
- Notification of the claimant's right to submit evidence to show why the proposed action should not be taken
- Statement explaining that the claimant is entitled to a personal hearing to present evidence

To successfully complete the task of rating a claim for Disability Pension, you must prepare a rating decision.

All ratings must contain the issues reviewed, evidence reviewed, complete rationale of the decision, and a conclusion to include supporting data.

The sections of a rating decision include:

- Identifying Data and Introduction Paragraph
- Decisions
- Evidence
- Reasons for Decision
- Coded Conclusion

You must provide an explanation of the decision(s) in the Reasons for Decision section. For each issue you must provide a complete rationale for the decision you made.

If entitlement is not granted, you must explain why. Each rationale must include the evidence considered for that issue. The facts and information in the evidence must also be included in the rationale provided for each decision.

When awarding grants of non-service connected pension, the following must be included in the reasons for decision:

1. The benefit/issue/disability being granted
2. The basis for the decision (i.e. how entitlement to pension is established)
3. A summary of the evidence considered to justify the decision

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When extra schedular grants of non service-connected pension are awarded, the following must be included in the reasons for decision discussion:

1. The benefit/issue/disability being granted
2. The basis for the decision (i.e. how entitlement to pension is established)
3. The fact that the decision is contingent upon approval from the Veteran’s Service Center Manager
4. A summary of the evidence considered to justify the decision

When granting other issues such as special monthly pension and aid and attendance/housebound, make sure to include the following in the reasons for decision discussion:

1. The benefit/issue/disability being granted
2. The basis for the decision
3. A summary of the evidence considered to justify the decision
4. The correct effective date as well as a description of how it was established

When addressing the issue of competency, a discussion of evidence as basis of the decision must be included in the reasons for decision section.

When denying benefits, the following must be included in the discussion:

1. The benefit being denied
2. The basis for the decision (i.e., why entitlement to benefits is denied)
3. A discussion of the evidence considered and factual conclusion
4. The requirements to establish entitlement/eligibility

On the codesheet, you must include:

- The future exam date (MM/YY), if applicable.
- The EP code, type of claim and date of claim.
- The decision for entitlement to Pension and Special Monthly Pension if applicable.
- The diagnostic code, disability name, and evaluation for each of the disabilities considered for Pension purposes.

Follow the instructions for using the Pension Rating Template to generate your decision during your TPSS training and testing.