Training Coordinator's Module Guide for VSR TPSS Income Adjustments Module

August 26, 2013

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Section 1 - Introduction

Introduction

Welcome to the VSR Training and Performance Support System (TPSS) Income Adjustments Module. 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 course.

Section 1 of this guide is an introduction designed to present you with a broad overview of the Income Adjustments 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 summaries for each of the lessons in the Income Adjustments 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.

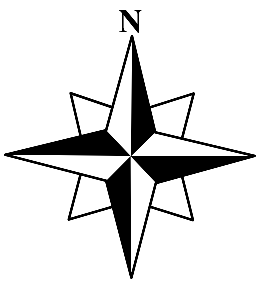
Who Will Take The Modules?

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

> **Note:** The pretests are optional. Students who want to take a module may choose to take the pretest, or may choose to go directly to the module.

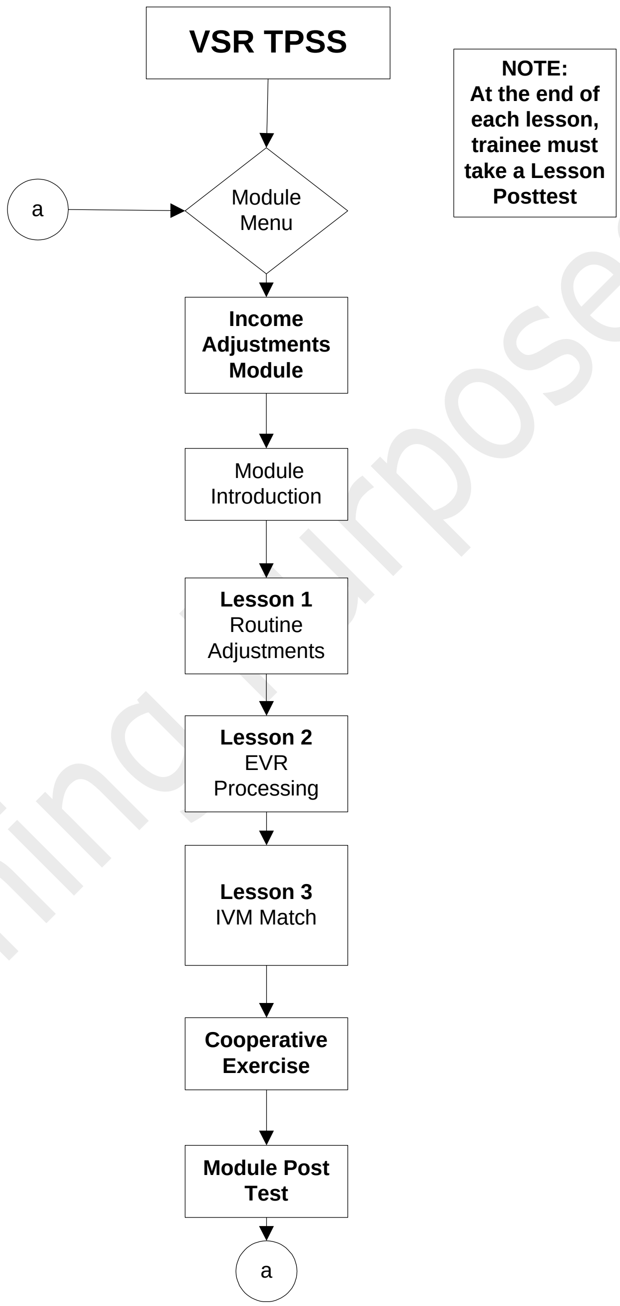
All students selected to take these modules should take each lesson and topic, in sequence to ensure that he/she has (or gains) a comprehensive understanding of VSR tasks from start to finish.

Module Map



To get an overview of how the Income Adjustments Module is laid out, take a look at the Module Map below.

As you can see, the module is comprised of lessons. At the end of each lesson the student must take a lesson posttest.



Learning Objectives

Each module is divided into lessons which have objectives. A lesson objective builds upon the previous lesson's objective. Collectively, the lesson objectives represent the requirements of the module objective.

The module 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.

Whereas the lesson objectives detail the **action** of the task the students will learn, the **conditions** under which they will learn this task, the **standards** to be met in order to successfully perform the task, and the **time** it should take to complete the task addressed in the lesson.

Students' 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 module objective at the beginning of the module. At the beginning of all lessons, students will also be asked to read the corresponding lesson objectives.

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.

As Students Take the Course

Make sure to carefully observe students as they go through the course to identify any participants who are struggling in a particular area. Early intervention is the key to student success in the course and in the posttests.

Also encourage students to read and follow the directions for the cooperative exercise very carefully.

Module Test Design

Tests are designed to evaluate the students in an authentic or "real life" setting using cases or scenarios. The module pretests and posttests consist of various scenarios that the student must review in order to decide the next appropriate action.

The scenarios and evidence used in the tests are derived from actual claims 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.

Module Pretest

Taking the module pretest is optional. A student may choose to take the test to determine if he or she can opt out of taking the module, or they may choose to go directly to the lessons.

The passing criteria for the module pretest are provided in the test directions/answer keys. You can access the test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1379366.

While you do need to administer the module pretest, you do not need to enter the test score. After you score the module pretest answer sheets and provide feedback to the students, you will email the module pretest scores to the TPSS Help Desk (**CDSHelpDesk@vba.va.gov**). You can email the module pretest 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 score and P or F, date, amount of time.

Lesson Test Design

Each lesson contains a posttest and one variant of the posttest. The computer pulls the items for the posttest and variant in random order from a bank of questions. Therefore, an infinite number of test variants can be generated. Each test contains several multiple-choice, knowledge-based questions, and was written to reflect every knowledge point deemed critical by a panel of subject matter experts (SMEs). The posttest will be delivered and scored online. Students will be required to pass the lesson posttest or variant(s) before moving on to the next module.

Lesson Test Procedures

Before Students take a Lesson 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 or variant and received their scores.

After Students Have Completed the Lesson Posttest: The computer presents students with the following:

- The overall posttest score.
- The question(s) that were missed.
- Any incorrect answer that was chosen.
- The correct answers.
- The topic to review.

Students who did not receive a passing score must take the variant of the posttest after remediation. They should review the answers that were incorrect. They should also review the topic(s) listed.

Note: Students need to write down the topic(s) (listed in blue) that need(s) to be reviewed. You cannot print while taking the lesson posttest. After remediation, students may retake the posttest as many times as necessary to achieve a passing score.

Lesson Test Remediation

If a student requires additional assistance after reviewing the questions he or she missed, you should provide additional training or information to fit each student's individual needs. Some options for remedial training include study of M21-1MR and review of selected topics in the lesson.

Module Posttests

There are two available 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 Variant 2, if needed. If a student does not pass a module posttest, then you will provide remediation and administer a variant of the test.

The passing criteria are provided in the test directions and answer keys. You can access the test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1379366.

While you do need to administer the module tests, you do not need to enter the test scores. After you score the module test answer sheets and provide feedback to the students, you will email the module test scores to the TPSS Help Desk (**CDSHelpDesk@vba.va.gov**). You can email the module test 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 score and P or F, date, amount of time.

TPSS Materials

Everything that your students need to complete the Income Adjustments Module is available to them within the module online. Once you get the groups set up in the Courseware Delivery System (CDS) and provide them 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 #1379366.

TPSS Equipment

Dual Monitors

The computers for the students 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:

"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.

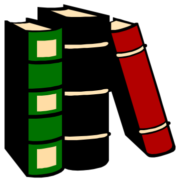
If you do not have dual monitors, when you select a case using the button, it will open in a new window, and you must navigate between the case and the courseware by holding down the Alt key and the Tab key at the same time. Using the Alt-Tab feature allows you to toggle back and forth.

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.

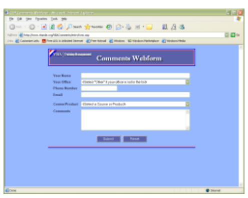
Publications



Ensure that students have access to VSR reference materials, such as:

- ⇨ M21-1MR
- ⇨ 38 Code of Federal Regulations (38 CFR)
- ⇨ VBA Circulars
- ⇨ Regional Office Procedures

Reporting Feedback



Send in any feedback, reactions, comments (recommendations, additions, deletions) and any pertinent data which may be of use in improving this courseware by accessing the comments database web form.

There are two ways to access the comments database webform:

1. In the courseware, select the Comment link in the upper right corner of the screen.
2. Go to the Compensation Service Home Page (**http://cptraining.vba.va.gov)**. From here, select the "Submit a Comment" link on the left side of the screen.

Section 2 - Module Master Planning Chart

Income Adjustments Module

The Module Master Planning Chart 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.

Note: The estimated range of time required to complete the online content, including cooperative exercises and a single version of the Lesson Posttests, is 8 hours, 15 minutes to 13 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 9 hours, 45 minutes to 16 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: **13 hours**
- Estimated total Student time for Module (aka, total "seat" time): **15 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: **3 hours, 15 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 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.)

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
	15	**Module Pretest Preparation**	
2	00	**Module Pretest (optional)**	Administered sometime prior to Day 1 of the training.
	45	**Module Pretest Grading**	Test directions and answer keys are in the VBA Learning Catalog.
1	00	**Administrative Functions**	Includes emailing the TPSS Help Desk with Module Pretest results, if applicable, notifying students of course schedule, and preparing a briefing.
	30	**Orientation/Briefing**	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.
	30	**Module Introduction**	Students read the module objective. Students are introduced to lessons contained in the module.
3	00	**Lesson 1**	• **Introduction** – Students will read lesson objective(s). • **Topic 1** – Unreimbursed Medical Expenses • **Topic 2** – Change to Household Income
	5	**Computer-Graded Lesson 1 Posttest Briefing**	Includes time to review lesson objective and explain how to access the online computer-graded test to the students before they begin, as well as ensure students are ready to take the test.
	15	**Computer-Graded Lesson 1 Posttest**	Students access the test online. The computer grades the test and provides feedback. Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, he or she must review the

Duration			
hrs	min	Activity	Notes / Tips
			computer-generated feedback and follow instructions for reviewing missed information until he or she feels confident to take a variant of the Lesson Posttest. The student may retake the computer-graded test as many times as necessary to pass.
2	00	**Lesson 2**	• **Introduction** – Students will read lesson objective(s). • **Topic 1** – Initial Review • **Topic 2 -** Adjustments to Pension Programs • **Topic 3** – Failure to Return EVRs
	5	**Computer-graded Lesson 2 Posttest Briefing**	Includes time to review the lesson objective and ensure students are ready to take the test.
	15	**Computer-graded Lesson 2 Posttest**	Students access the test online. The computer grades the test and provides feedback. Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, he or she must review the computer-generated feedback and follow instructions for reviewing missed information until he or she feels confident to take a variant of the Lesson Posttest. The student may retake the computer-graded test as many times as necessary to pass.
2	00	**Lesson 3**	• **Introduction** – Students will read lesson objective(s). • **Topic 1** – Security Considerations • **Topic 2** – Initial Screening and Verifying Income • **Topic 3** – Completing the IVM Process
	5	**Computer-graded Lesson 3**	Includes time to review the lesson objective and ensure students are ready to take

Duration			
hrs	min	Activity	Notes / Tips
		Posttest Briefing	the test.
	15	**Computer-graded Lesson 3 Posttest**	Students access the test online. The computer grades the test and provides feedback. Feedback times will vary depending on the number of items a student missed. If a student fails the Lesson Posttest, he or she must review the computer-generated feedback and follow instructions for reviewing missed information until he or she feels confident to take a variant of the Lesson Posttest. The student may retake the computer-graded test as many times as necessary to pass.
1	45	**Module 4 Cooperative Exercise**	Students will review several case scenarios that include EVRs or VA forms and, in some cases, evidence, to determine how to proceed with processing an Income Adjustment. They will also complete a Self-Assessment. The Self-Assessment prompts students to: • Reflect on what they have learned in this module. • Measure their individual level of understanding of the concepts and procedures presented. • Assess how confident they feel about their ability to successfully process an Income Adjustment.
	15	**Module Posttest, Variant 1 Briefing**	Includes time for reviewing the results of the cooperative exercises, reviewing the module by reading the Lesson Summaries, and reviewing the module objective.
2	00	**Module Posttest, Variant 1**	
	45	**Module Posttest, Variant 1 Grading (if applicable)**	Test directions and answer keys are in the VBA Learning Catalog.

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
	45	**Module Posttest, Variant 1 Feedback (if applicable)**	**Note:** Feedback times will vary depending on the number of items a student missed. If a student fails Variant 1 of the Module Posttest, you must provide remediation until the student feels confident enough to take Variant 2 of the Module Posttest. At that time, you will administer Variant 2 in the same way you administered Variant 1 of the Module Posttest and provide feedback based on the student's results of Variant 2.
2	**00**	**Module Posttest, Variant 2 (If applicable)**	
	45	**Module Posttest, Variant 2 Grading (if applicable)**	Test directions and answer keys are in the VBA Learning Catalog.
	45	**Module Posttest, Variant 2 Feedback (if applicable)**	**Note:** Feedback times will vary depending on the number of items a student missed. If a student fails Variant 2 of the Module Posttest, you must provide remediation until the student can demonstrate proficiency in the task.
	15	**Emailing TPSS Help Desk Based on Module Posttest Results**	

Section 3 – Lesson Summaries

Training Coordinator's Notes

This section provides a summary of each lesson in the Income Adjustments Module. Review the entire module by reading the following summary (or your own personalized version) before distributing the module posttest.

After you have presented the module 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 module before administering the module posttest.

The summaries begin on the next page.

Lesson 1 - Routine Adjustments

As a Veteran Service Representative (VSR), you will process a change to household income for UMEs.

Unreimbursed medical expenses (UMEs**)** are medical expenses paid by recipients of income-dependent benefits. Unreimbursed Medical Expenses are normally reported on VA Form 21-8416, Medical Expense Report.

The medical expenses must be incurred on behalf of the beneficiary or a relative of the beneficiary who is a member of the beneficiary's household.

VA Form 21-4138, Statement in Support of a Claim, is used when additional development for medical expenses is needed.

You will be required to review all evidence and determine if a change to benefits is necessary. After reviewing the evidence submitted, you are responsible for processing the necessary adjustment. It is also your responsibility to notify the claimant of the decision regarding his or her change in benefits.

Lesson 2 - EVR Processing

As a VSR, you are responsible for processing eligibility verification reports (EVRs) for recipients of income-based VA benefits.

EVRs released by Hines Benefits Delivery Center (BDC) are usually released in December with instructions for the beneficiary to complete and return to the RO of jurisdiction by March 1st. In order to have received an EVR, a claimant must be in receipt of income-based benefits by the end of August to be included in the current year review.

During the initial review of the EVR, you must ensure that it is properly and completely filled out, and that the eligibility information is entered into the VA electronic database. If you find any discrepancies with the EVR, you will compare the information provided on the EVR with evidence in the beneficiary's C-File or electronic file.

You will also make adjustments to beneficiaries pension rates based on the information provided on the EVR. These adjustments may increase or decrease the effective rate of payment. And if a recipient of income-based benefits fails to return an EVR, you will be required to terminate their benefits.

The effective dates of termination for Improved Pension and Parents' DIC beneficiaries are the first day of the EVR reporting period or the commencing date of the original or reopened award, whichever is later.

When working with EVRs, you are required to follow designated VA procedures to ensure the privacy and physical protection of the claimant's information.

Lesson 3 – Income Verification Match

As a VSR, you are responsible for processing income verification matches (IVMs) for recipients of income-based VA benefits.

When working with IVMs, you are required to follow designated VA procedures to ensure the security and confidentiality of income information.

The income verification match process starts when a contradiction is found between VA information furnished by the beneficiary and IRS or SSA records.

During your review of the IVM, you must determine if there are any discrepancies, and if further development is necessary. You will also be required to make adjustments to beneficiary's pension rates based on the information in the IVM or information furnished by the income payer, income recipient or beneficiary. It is also your responsibility to notify the beneficiary of any decision regarding changes to their benefits.