For Training Purposes Only

Training Coordinator's Module Guide for VSR TPSS Original Claim for Pension Module

June 27, 2013

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Section 1 - Introduction

Introduction

Welcome to the VSR Training and Performance Support System (TPSS) Original Claim for Pension 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 Original Claim 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 summaries for each of the lessons in the Original Claim 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 this module should have either failed or opted not to take the module pretest.

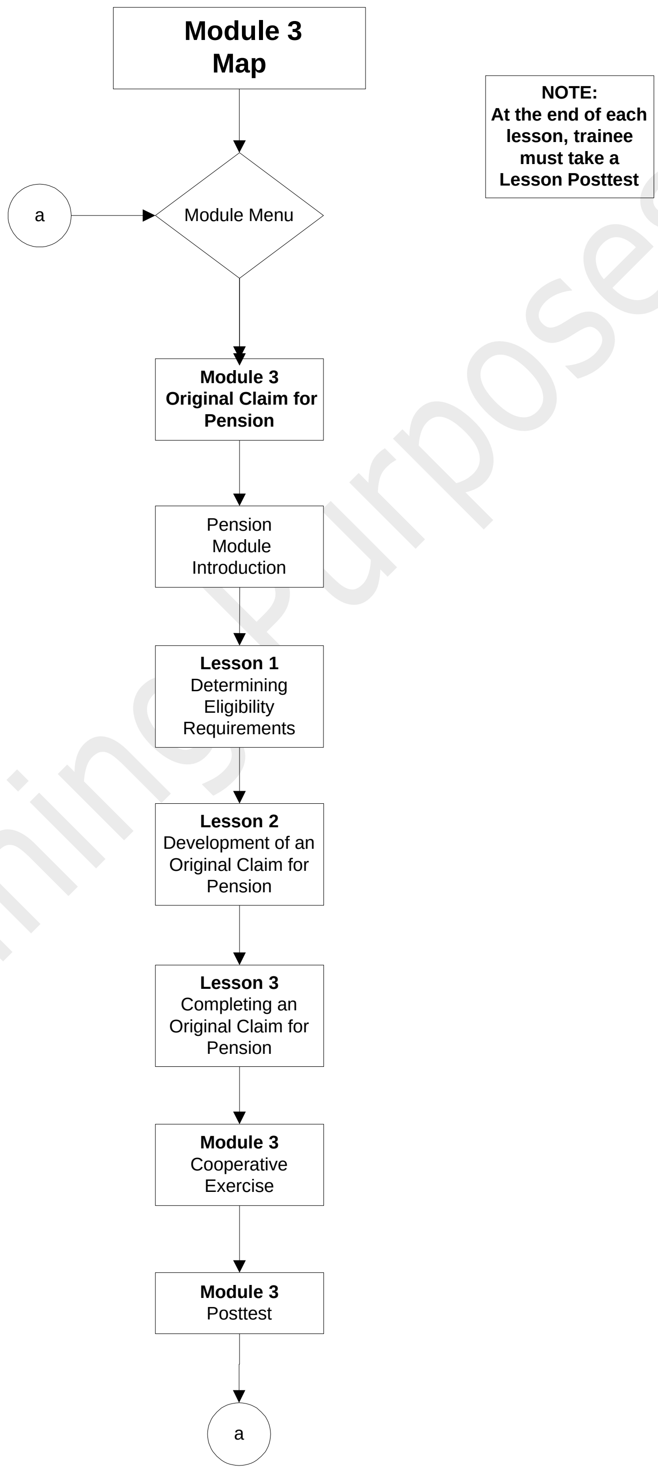
> **Note:** The pretest is optional. Students who want to take a module may choose to take the pretest, or may choose to go directly to the module.

All students selected to take this module 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 Original Claim for Pension Module is laid out, take a look at the Module Map below.

As you can see, each module is comprised of lessons.



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.

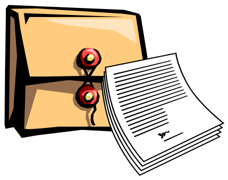
The module objective details the **action** to be taken (the task), the **conditions** under which the task is to be performed, the **standards** to be met in order to successfully perform the task, and the **time** it should take to complete the task on the job.

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.

Module Test Design



Tests are designed to evaluate the students in an authentic or "real life" setting using cases or scenarios. The module pretest 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 #1379363.

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 computer-graded 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 lesson 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.

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.

Lesson Test Remediation

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.

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 module test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1379363.

While you do need to administer the module test, you do not need to enter the test score. 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 Original Claim for 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 module test answer sheets that they print from the system and give them feedback.

You can access the module test scoring instructions and answer keys from the VBA Learning Catalog. Search for TMS Item #1379363.

TPSS Equipment

Dual Monitors

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:

"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.

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.

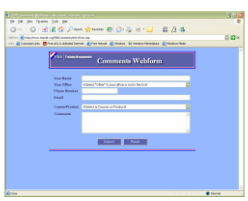
Also encourage students to read and follow the directions for the cooperative exercise very carefully.

Publications

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

- ⇨ M21-1MR
- ⇨ 38 Code of Federal Regulations (38 CFR)
- ⇨ VBA Circulars
- ⇨ Pension Management Center 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 web form at:

http://cptraining.vba.va.gov

Select the **<u>Comments Web Form</u>** link located at the bottom of the page.

Section 2 - Module Master Planning Chart

Original Claim for Pension 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 6 hours to 10 hours. The Module Posttest times ranged from 1 hour to 1 hour, 30 minutes. The estimated total student course time ranges from 7 hours to 11 hours, 30 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: **9 hours, 30 minutes**
- Estimated total Student time for Module (aka, total "seat" time): **11 hours, 15 minutes**
(**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 they are.)

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
	15	**Module Pretest Preparation**	Includes giving student access to the Original Claim for Pension Module in TMS.
1	**15**	**Module Pretest (optional)**	Administered sometime prior Day 1 of the training.
	30	**Module Pretest Grading**	Scoring instructions 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, assigning student privileges, 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.
	10	**Getting Started**	Students learn about the interface and course structure.
	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** – Pension Eligibility Requirements • **Topic 2** – Organizing Supporting Information • **Topic 3** – Income • **Topic 4** – Net Worth
	5	**Computer-Graded Lesson 1**	Includes time to review lesson objective and explain how to access the online

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
		Posttest Briefing	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 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**	**Lesson 2**	• **Introduction** – Students will read lesson objective(s). • **Topic 1** – Initiating a Claim for Pension • **Topic 2** – Locating Supporting Evidence
	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.
1	**00**	**Lesson 3**	• **Introduction** – Students will read lesson objective(s). • **Topic 1** – Completing an Original Claim for Pension Based on a Rating Decision

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
			• **Topic 2** – VSR Denial of an Original Claim for Pension
	5	**Computer-graded Lesson 3 Posttest Briefing**	Includes time to review the lesson objective and ensure students are ready to take 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	**30**	**Module Cooperative Exercise**	Students will review several case scenarios that include VA forms and, in some cases, evidence, to determine how to proceed with processing an Original Claim for Pension claim. They will also complete a Self-Assessment. The Self-Assessment prompts students to: • Reflect on what they have learned in this module. • Measure their level of understanding of the concepts and procedures presented. • Assess how confident they feel about their ability to successfully process an Original Claim for Pension claim.
	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.

Duration			
hrs	**min**	**Activity**	**Notes / Tips**
1	**15**	**Module Posttest, Variant 1**	
	45	**Module Posttest, Variant 1 Grading (if applicable)**	Scoring instructions and answer keys are in the VBA Learning Catalog.
	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.
1	**15**	**Module Posttest, Variant 2 (If applicable)**	
	45	**Module Posttest, Variant 2 Grading (if applicable)**	Scoring instructions 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 Original Claim for Pension Module. Review the entire module by reading the following summary (or your own personalized version) before telling them to take 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 - Determining Eligibility Requirements

Pension is a benefit based on need stemming from the inability to earn a reasonable livelihood because of a permanent and total disability. It is restricted to Veterans with service performed in time of war. The amount the VA will pay depends on the type and amount of income the Veteran and Veteran's family members receive from other sources.

In addition to military service and character of discharge, a Veteran must have served Basic pension eligibility is established if:

- served at least 90 days, or
- served any amount of time and was discharged for a disability incurred or aggravated in service or had a service-connected disability at time of discharge that would have justified a discharge for disability.

In addition to the 90 days, a claimant must also meet a minimum active duty service requirement of 24 months.

To be eligible for pension, a claimant must have served in the military, naval, or air service during a period of war. The minimum time limit a claimant must have served during a wartime period is 1 day. However, the claimant did not have to serve in the war zone -- just serve during the period of war.

Eligibility for VA nonservice-connected pension benefits is also contingent on the claimant's income. A claim for pension must be denied if countable income exceeds the applicable income limit found in M21-1 Part I Appendix B - Rate Tables.

In addition to income, claimants cannot receive pension benefits if they have financial resources that are sufficient to meet his or her basic needs without assistance from VA.

Effective September 17, 2001, PL 107-103 added three criteria that presumptively establish entitlement to pension without need for rating action, if basic eligibility is first established.

Presumptive criteria:

- The Veteran is age 65.
- The Veteran is a patient in a nursing home for long-term care due to disability.
- The Veteran is disabled for the purposes of the Social Security Administration.

If the Veteran meets all basic eligibility criteria and at least one of the three presumptive criteria, he/she is presumed permanently and totally disabled for pension purposes. There is no need for rating action and the VSR may award pension benefits.

Lesson 2 - Development for Original Claim for Pension

A formal claim for pension is usually a properly completed and signed VA Form 21-526. In some instances, a Veteran may have a completed VA Form 21-526 on file but never applied for pension benefits.

For example, a Veteran could have submitted a VA Form 21-526 for compensation benefits in the past, but is now applying for pension benefits for the first time.

In such cases, a completed and signed VA Form 21-527 can be used as a claim for pension benefits. This form collects specific pension information about income, net worth, and employment.

As a VSR, you can determine if a claimant meets the requirement for military service by checking to see if this information is in the electronic database at your RO, or if the claimant has submitted a DD 214 or other discharge certificate.

To determine the Veteran's length of service, use the electronic database at your RO to locate the date the Veteran entered on active duty (EOD) and the date he or she was released from active duty (RAD).

You will compare the claimant's dates of service to the wartime periods. Remember that just one day of wartime service is all that is required to fulfill the wartime service requirement for pension.

The date the Veteran entered active duty will generally be labeled "DATE OF ENTRY" or "DATE ENTERED ACTIVE DUTY THIS PERIOD." The date of separation will be in the section that is either labeled "Transfer or Discharge Data" or contains "Type of Separation" information. The separation date is usually next to a block labeled "Effective Date."

Lesson 3 - Completing an Original Claim for Pension

As a VSR, you would deny an original claim for Pension without referral to the Rating Personnel if the claimant does not meet the requirements for:

- military/wartime service,
- character of discharge,
- income, and
- net worth.

In addition, a VSR would also deny an original claim for Pension before referral to the Rating Personnel if a claimant withdraws his or her claim.

If Rating Personnel determine the Veteran meets the medical criteria for Aid and Attendance, you need to evaluate if the award is to be processed with a Medicaid reduction.
A Medicaid reduction would apply to Veterans who:

- have no dependents,
- reside in a Medicaid approved nursing facility, and
- Medicaid covers the cost of services provided by the nursing facility.

If you encounter a Veteran who is awarded Aid and Attendance and does not meet this criterion, calculate his or her monthly payment using the Aid and Attendance MAPR figure.

If the claimant indicates on the VA Form 21-526 that he or she is living in a nursing home, call the nursing home to see if it is a Medicaid approved nursing home. The nursing home will also provide information regarding whether Medicaid is covering the Veteran's nursing home expenses.

Once the C-File is returned from the Rating Personnel, retrieve the Veteran's IVAP from the same system since this is needed to calculate the Veteran's monthly rate of pension. Once you have the Veteran's IVAP, locate the MAPR for the Veteran's DOC from M21-1 Appendix B, and select the figure which applies to the Veteran. Once you've determined the Veteran's MAPR, subtract the IVAP from this figure. Take the difference between the IVAP and MAPR and divide this by twelve (12). This quotient is the monthly rate of pension for the Veteran.