Education Service

VIS 201

Veterans Information Solution for Education

Lesson Plan



January 2020

Version 1.0

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 2 hours |
| Purpose of the Lesson: | The purpose of this lesson is to provide the Veterans Claims Examiner (VCE) with an in depth understanding of the Veterans Information Solution.  This lesson is part of the National Training Curriculum, and is intended to serve as refresher training for experienced Veteran Claims Examiners. |
| Prerequisite Training Requirements: | None |
| Target Audience: | This lesson is for entry-level, intermediate, or journey-level employees. This training is mandated and may be used for refresher training as necessary. |
| Lesson References: | * [**M22-4, Part III, Chapter 3**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001048/content/554400000073583/Part%203:%20Chapter%203%20-%20Processing%20Applications%20for%20Benefits) * [**M22-4, Part XII, Chapter 33**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001048/topic/554400000007294/Part-12-Chapter-33) * [**VADIR as Authoritative Source for All Active Service Periods after January 1, 2015**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001048/content/554400000083620/VADIR-as-Authoritative-Source-for-All-Active-Service-Periods-after-January-1-2015) * [**DVA Chief of Staff Memorandum, May 19, 2017, Subject: Veteran and Eligible Beneficiary Identity Authoritative Data Source Selection (VAIQ 7771217)**](https://vaww.pclo.infoshare.va.gov/PCLO/MemosDirILs/Memos/05192017%20-%20Data%20Governance%20-%20SD%20Memos%20w%20Attachments.pdf) * [**VIS User Guide**](http://vaww.va.gov/hec/Training/vis_userguide.asp) * [**https://vaww.visr.aac.va.gov/vis/**](https://vaww.visr.aac.va.gov/vis/) |
| Lesson Objectives: | At the end of this lesson, you will:   * Recognize service data in VIS as authoritative * Know how to correctly document service information from VIS into a file * Recall the different pages and sections in VIS used for claims processing * Learn how to interpret information reported and identify know issues |
| What You Need: | Reserve adequate space equipted to project PowerPoint presentation. Provide copies of handouts in advance of the lesson or provide directions on how to print from saved location with training advertisement, refer to lesson plan and have a subject matter expert (SME) available if primary presenter is not an SME to assist with answering questions. Training should be instructor led with a means to ask questions during the training. It may be delivered virtually however, except for make-up sessions, always to live participants. Individuals viewing a recorded live session to make-up the training should be provided a local POC who is available for questions while the employee is taking the lesson. |
| Post Training Requirements: | Upon completion of the classroom portion of the lesson, participants are required to complete an online lesson assessment and survey in Talent Management System (TMS).  To demonstrate successful completion of the lesson participants must pass the assessment with a score of at least 80%.  Participants must also complete the online survey to earn credit for completion of the lesson. |

Instructor Notes

This lesson will prepare the Veterans Claims Examiner (VCE) to use the Veterans Information Solution to verify service and eligibility information necessary for processing Education benefit claims.

| PowerPoint Slides | Instructor Activities |
| --- | --- |
| **VIS 201 Veterans Information Solution  for Education** | **DISPLAY** slide  INTRODUCE yourself as the instructor and introduce the lesson. |
|  | **DISPLAY** slide  **INTRODUCE the terms on this page, by quickly running through the abbriviations only and letting the learners read to themselves the proper term from the slide.**  **STATE “You should already be familiar with these terms - these abreviations will be used throughout this presentation.”** |
|  | **DISPLAY** slide  **REVIEW the lesson learning objectives.** |
|  | **DISPLAY** slide  **PREPARE learners for the introductory overiew part of the lesson. “We’ll now begin with an overview of VIS; why we use it, discuss the parts developed for and used to process Education claims, and required documentation. (i.e. capture requirements.)”** |
|  | **DISPLAY** slide  **READ the information on the slide. Explain the background of the data feed, and how in the bigger picture, VIS is the primary source of data for education benefits.** |
|  | **DISPLAY** slide  **Refer back to the previous slide – On the previous slide we reviewed a VA directive to use VADIR to determine eligibility, which is why we use VIS.**  **READ information on the slide.**  **“As with any system, it is not without flaws. However, VIS is our primary source for service information which we consider reliable unless there is evidence to conclude otherwise. Ocasionally VIS may be missing information as well – for example if a claimant indicates an excluded period but VIS does not indicate one, this should not be interpreted as one does not exist. It only indicated nothing has been reported. Development will be required.”** |
|  | **DISPLAY** slide  **READ information on the slide. Explain how the education tab is in constant development to improve data reliability as well as layout to improve user experience.** |
|  | **DISPLAY** slide  **READ information on the slide. Explain how the other tabs are for different business lines.** |
|  | **DISPLAY** slide  **READ information on the slide.** |
|  | **DISPLAY** slide  **READ information on the slide.** |
|  | **DISPLAY** slide  **READ the information on the slide.** |
|  | **DISPLAY** slide  **READ the information on the slide.** |
|  | **DISPLAY** slide  **READ the information on the slide.**  **Highlight the sections that will be beneficial for education benefit processing** |
|  | **DISPLAY** slide  **READ the information on the slide.** |
|  | **DISPLAY** slide  **READ the information on the slide.**  **Emphasize the importance of reviewing on every education claim.**  **Only 35/Fry supplemental claims do not require service review unless those beneficiaries are service members.** |
|  | **DISPLAY** slide  **READ the information on the slide.** |
|  | **DISPLAY** slide  **PREPARE learners to go more indepth into understanding the system and how we properly use VIS.** |
|  | **DISPLAY** slide  **“We will begin by going over the Education page.”** |
|  | **DISPLAY** slide  **READ the information on the slide.**  **Ephasize that POA is found on BIRLS and how one must expand that section one in the VIS web page, and depending on one’s own processing flow, BIRLS can be accessed different ways.** |
|  | **DISPLAY** slide  **READ information on the slide. Explain how I use this field to guide me down a certain “path” of service information, will I be on the lookout for additional GRAS? Has he been separated for an extended period of time? Etc.** |
|  | **DISPLAY** slide  **READ the information on the slide.**  **Explain the background of the “election” via DOD and how this may impact election dates and alternative elections.** |
|  | **DISPLAY** slide  **READ the information on the slide.** |
|  | **DISPLAY** slide **23.**  **EXPLAIN this is our process flow for the TOE indicator. Emphasize how development is rarely needed if we use the RAD date and OED date to determing if obligation was met. TOE elig is not subjective and it is not a VA decision, it is our job as adjudicators to use the data VIS provides to determine, and when conflict is present, develop. Explain that the indicator is not input by DOD to tell us yes or no regarding TOE elig, but rather cross references data to make an “indication” of eligibility.** |
|  | **DISPLAY** slide **24.**  **READ the information on the slide.**  **RECALL🡪 GRAS on Military history for reserve and guard active service and compare the two sections.** |
|  | **DISPLAY** slide **25.**  **READ the information on the slide.**  **Hover text is available in live VIS, printed reports will display narrative.** |
|  | **DISPLAY** slide **26**  **READ the information on the slide.**  **Explain that these eligibility codes are NOT exclusively separation reasons and how those differ. Touch upon how 98 and 99 will eventually be obsolete as we continually work upon data improvement.** |
|  | **DISPLAY** slide **27.**  **READ the information on the slide. Explain the bigger context of while processing, be on the lookout for those under the 100% elig tier, that purple heart may be present and that will impact eligibility.** |
|  | **DISPLAY** slide **28.**  **READ the information on the slide.**  **Emphasize that payments are not retroactive before 1/1/18.** |
|  | **DISPLAY** slide **29.**  **READ the information on the slide.**  **Speak to how this was a “win” for processing, as sources for Ch30 and 1606 eligibility are now consolidated to make it easier for processors, as well as less margin for error since VIS is updated more regularly.** |
|  | **DISPLAY** slide **30.**  **READ the information on the slide.**  **Refer to MGIB eligibility processing guidance.** |
|  | **DISPLAY** slide **31.**  **READ the information on the slide.**  **Refer to MGIB-SR eligibility processing guidance.** |
|  | **DISPLAY** slide **32.**  **READ information on the slide.**  **Recall 🡪 although nothing is new, remind that kicker development changed recently and to refer to helpful charts when processing kickers** |
|  | **DISPLAY** slide **33.**  **READ information on the slide.**  **Emphasize the two separate areas for Guard/Reserve and Active components.** |
|  | **DISPLAY** slide **34.**  **READ the information on the slide.**  **Remind of the bigger picture that even though some information may be “incomplete” (IE no training on VIS) it may not be necessary in certain cases to question or develop for missing info.** |
|  | **DISPLAY** slide **35.**  **READ information on the slide.**  **Briefly touch upon how dates may not always line up exactly with service periods, and how to look at the case “as a whole” to determine the exact dates of exclusion.** |
|  | **DISPLAY** slide **36.**  **READ the information on the slide.** |
|  | **DISPLAY** slide **37**  **“Now we will take a look at the Military History page.”** |
|  | **DISPLAY** slide **38.**  **READ the information on the slide.**  **Clarify that the GRAS table contains project codes which provide additional information, however, “eligibility codes” on the Education page consider project codes along with other elements to assit with determinations.** |
|  | **DISPLAY** slide **39.**  **READ the information on the slide.**  **Explain the other indicators of how we can identify these cases such as service listed on application or BIRLS data.** |
|  | **DISPLAY** slide **40.**  **READ the information on the slide.** |
|  | **DISPLAY** slide **41.**  **READ the information on the slide.**  **Emphasize that BIRLS is not authoritative but it can be used as an indicator to alert you to a potential conflict.** |
|  | **DISPLAY** slide **42.**  **READ the information on the slide.** |
|  | **DISPLAY** slide **43, briefly, move to next slide.** |
|  | **DISPLAY** slide **44.**  **FOR Webinars – Ask attendees to place comments in the Q&A pod so they may be complied and included with responses in a Q&A document.**  **ASK for questions on the topics discussed in this training and entertain responses. (If trainees are reluctant, propose questions yourself to begin the dialog.)**  **CLARIFY responses as needed and paraphrase question clearly for all to hear before providing a “correct” responses.**  **NOTE limit questions to scope of topic. Do not guess. Unless information is covered in the training, make note of question and provide a follow-up response to all trainees as soon as possible.**  **MOVE to next slide prior to concluding.** |
|  | **DISPLAY** slide **45.**  **READ the information on the slide.**  **STRESS for everyone to complete the assessment and survey as soon as possible while the training is still fresh.** |