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| VA Seal-ColorVA Seal-ColorEDUCATION SERVICE  Transfer of Entitlement (TOE) Debts Update  ***Lesson Plan***  ***May 2020 Version 1.0*** |

Lesson Overview

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| **Time Estimate:** | | 1 hour |
| **Purpose of the Lesson:** | | The purpose of this training is to educate Claims Examiners on the updates associated with Transfer of Entitlement (TOE) Debts. |
| **Prerequisite Training Requirements:** | | None |
| **Target Audience:** | | Education Service Claims Examiners |
| **Lesson References:** | | The following references support the lesson content:   * 38 USC 3319 * Procedural Advisory: Creation of TOE Debts |
| **Lesson Objectives:** | | * Understand the updates related to TOE debts * Perform the actions required by Regional Processing Offices (RPOs) to appropriately assign TOE debts |
| **What You Need:** |  | | |
| **Post Training Requirements:** |  | | |

Instructor Notes

The purpose of this training is to introduce Claims Examiners to the new changes associated with Transfer of Entitlement overpayments.

| **PowerPoint Slides** | **Instructor Activities** |
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|  | **DISPLAY** slide 2 |
|  | **DISPLAY** slide 3  **NAME** the objectives |
|  | **DISPLAY** slide **4**  **DISCUSS** the previous guidance |
|  | **DISPLAY** slide **5**  **DISCUSS** the law prior to March 6, 2020 |
|  | **DISPLAY** slide **6**  **DISCUSS** the new guidance, effective March 6, 2020 |
|  | **DISPLAY** slide **7**  Now you will move into the claims processing procedures VCEs will take when encountering TOE Debts |
|  | **DISPLAY** slide **8**  **EXPLAIN** the actions VCEs must take when encountering overpayments or debts created by a termination of benefits |
|  | **DISPLAY** slide **9**  **EXPLAIN** the difference between an administrative error and a potential administrative error |
|  | **DISPLAY** slide **10**    **EXPLAIN** the items that need to be captured into TIMS |
|  | **DISPLAY** slide **11**  **EXPLAIN** the actions VCEs will take when a transferor fails complete obligated service |
|  | **DISPLAY** slide **12**  **EXPLAIN** the summary of steps involved in zeroing out all entitlement transferred in the transferor’s LTS record |
|  | **DISPLAY** slide **13**  **EXPLAIN** the summary of steps involved in zeroing out all entitlement transferred in the transferor’s LTS record |
|  | **DISPLAY** slide **14**  **EXPLAIN** the actions of the VCEs and Senior VCEs |
|  | **DISPLAY** slide **15**  **EXPLAIN** the actions of the VCEs and Senior VCEs |
|  | **DISPLAY** slide **16**  **SUMMARIZE** the discussed claims processing procedures |
|  | **DISPLAY** slide **17** |
|  | **DISPLAY** slide **18**  **EXPLAIN** the actions required by the VCE |
|  | **DISPLAY** slide **19**  **DISCUSS** the aspects of Scenario 1 |
|  | **DISPLAY** slide **20**  **DISCUSS** the aspects of Scenario 2 |
|  | **DISPLAY** slide **21**  **DISCUSS** the aspects of Scenario 2 |
|  | **DISPLAY** slide **23**  **DISCUSS** the aspects of Scenario 3 |
|  | **DISPLAY** slide **23**  **DISCUSS** the aspects of Scenario 3 |
|  | **DISPLAY** slide **24**  **PREPARE** students for Knowledge Check Questions |
|  | **DISPLAY** slide **25**  **DISCUSS** Knowledge Check Question |
|  | **DISPLAY** slide **26**  **EXPLAIN** Knowledge Check Answer |
|  | **DISPLAY** slide **27**  **DISCUSS** Knowledge Check Question |
|  | **DISPLAY** slide **28**  **EXPLAIN** Knowledge Check Answer |
|  | **DISPLAY** slide **29**  **DISCUSS** Knowledge Check Question |
|  | **DISPLAY** slide **30**  **EXPLAIN** Knowledge Check Answer |
|  | **DISPLAY** slide **31**  **DISCUSS** Knowledge Check Question |
|  | **DISPLAY** slide **32**  **EXPLAIN** Knowledge Check Answer |
|  | **DISPLAY** slide **33** |
|  | **DISPLAY** slide **34** |
|  | **DISPLAY** slide **35**  **ALLOW** students the opportunity to ask questions; **PROVIDE** answers and applicable feedback |
|  | **DISPLAY** slide **36**  **DISCUSS** TMS Assessment and Survey |