

# Pension and Fiduciary Service National Fiduciary Quality & Training Call Notes

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<b>Call Information</b>	Date: Tuesday, August 16, 2016
	Time: 1:00 – 2:00pm ET
	TMS: VA 4191614

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## Call Meeting Minutes

Call Agenda Item	Details
<p><b>Introduction to Veterans Benefits Management Training (VBMS)</b></p>	<p>The Virtual VA (VVA) System is the current document repository for the fiduciary program. When opening VVA, users will see a notice informing them of VVA's planned retirement. A final VVA retirement date is yet to be determined, however, in preparation, P&amp;F Service is providing mandatory training on Veterans Benefits Management System (VBMS) for hub personnel.</p> <p>The Introduction to VBMS training instructs users on how to access the VBMS system, navigate to the help features, search for beneficiary records, and manage documents in the VBMS eFolder.</p> <p>This mandatory course is for all hub employees. P&amp;F Service will release a due date for completion of the training in the future along with training materials for hubs to conduct live demonstration training locally.</p>
<p><b>Targeted Program Review (TPR) In Process Reviews (IPRs)</b></p>	<p>P&amp;F Service is actively conducting IPRs of TPR cases and forwards all identified errors to the respective hubs. TPR errors are non-punitive and are for training purposes only. The below guidance addresses some of the identified errors.</p> <p><b><u>IPR Error Trends</u></b></p> <p><b><i>Change of Fiduciary (CFID)</i></b> - CFIDs are required for supervised direct pay (SDP) cases even though the beneficiary may be handling all finances. CFIDS must be completed to update the master records in accordance with FPM 1.B.7.p.</p> <p><b><i>VA Form 21-592, Request for Appointment of a Fiduciary, Custodian or Guardian</i></b> – Hubs are not required to complete VA form 21-592 for TPR cases. In lieu of completing the form, employees must document the information that would normally be contained in VA Form 21-592 in the "Initial Request For Appointment Information" fields on the beneficiary record in BFFS.</p> <p><b><i>Approved Language in TPR Notification Letters</i></b> - When sending out notification letters, please use the letter guide</p>



	and letters found in PL 21-16-01 enclosures. The standard language is approved by VBA leadership and should not be changed or altered. The addition of pertinent information is expected such as name, address, and claim number, however, the body of the letters should not be altered.
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## Call Questions and Answers

Area	Question	Answer
<b>Populating Fields in the VA Form 21-592</b>	Is there controlling guidance stating where “Other Income” on the VA Form 21-592 should be derived when documenting in BFFS?	For pension recipients, there is no controlling guidance requiring that “other income” field amounts come from the notification letter outlining countable income for VA purposes versus the amounts provided in the beneficiary’s application for benefits.  Errors should not be cited on the local or national level as long as the employee is able to substantiate where he or she obtained the income information. Completion of these fields provides baseline guidance to the field examiner (FE) of what has been reported as income. Income information will be verified during the Initial Appointment field examination and the BFFS fields will be updated based upon the results of the FE’s investigation.
<b>Beneficiary Ability to Review Fiduciary Documents in e-Benefits</b>	Will the beneficiary be able to view fiduciary documents using e-Benefits?	No: Fiduciary documents are restricted. Beneficiaries are only able to see documents that are not restricted within the eFolder.
<b>FPG Article Updates</b>	How can we determine if substantive changes have been made to FPG articles?	The green update notification on the right of FPG articles in KM represent the date of upload or indicate minor changes have been made to the article.



		P&F Service will issue a breaking news announcement on the Fiduciary KM homepage when substantive changes are made to content provided in KM. For FPG articles please check the date at the bottom of the article to know when the document was last updated with substantive changes.
<b>Centralized Training Schedule</b>	When will the next FE Centralized training scheduled?	No additional FE Centralized trainings are scheduled for this fiscal year. The proposed FY17 schedule is pending approval.
	When is the next LIE and FSR centralized training courses?	P&F Service is working to provide both FSR and LIE training in FY17. The proposed FY17 schedule is pending approval.
<b>National Quality Accuracy Rates</b>	How are error rates calculated?	<p><b>National Fiduciary Quality Accuracy (Three Month)</b></p> <p><i>June 2016 - 91.4% Target: 92%</i></p> <p>During FY16, P&amp;F Service and PA&amp;I implemented several changes within the Fiduciary Quality Assurance program to include changing the standard statistical practice weights results to adjust for varying degrees of workload across hubs (national weighting) and across months (station weighting).</p> <ul style="list-style-type: none"> <li>• National weighting: Previously, all hubs contributed 1/7 to the national accuracy. Now, larger hubs have a greater contribution toward national accuracy, and smaller hubs have a reduced contribution toward national accuracy</li> <li>• Station weighting: Previously, each month contributed 1/3 toward 3 month rolling accuracy. Now, the higher producing months have a greater contribution toward the 3 month</li> </ul>



		<p>rolling accuracy value for that hub. Lower producing months will have a lesser contribution toward 3 month rolling accuracy</p> <p>Please review the <a href="#">Fiduciary Star FY16 Program Changes</a> article in KM for additional information.</p>
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## Upcoming Events

Date	Event
August 24, 2016	QRT Call, Expedited Spouse Appointments Training
August 25, 2016	QRT Call, VBMS Live Demonstration Training
September 9, 2016	End of the FE Journey Level Self Study Course (JLSSC) 2016-3
September 20, 2016	Monthly National Fiduciary Quality & Training Call
September 30, 2016	Completion Deadline for the FE Misuse Web-based Training

## Next Monthly Quality & Training Call

The next National Fiduciary Quality & Training Call is on **September 20, 2016**.

This call is the third Tuesday of each month. P&F Service will send call information and Lync Meeting invite directly to field QRT personnel.

Please send an email to [FFE.VBACO@va.gov](mailto:FFE.VBACO@va.gov) notifying P&F Service of any changes to local QRT personnel. P&F Service maintains a distribution list of all field QRT personnel for notification of upcoming Quality and Training calls.

## Comments and Questions

Submit all comments and questions regarding these call notes and future calls to [FFE.VBACO@va.gov](mailto:FFE.VBACO@va.gov).

