Pension and Fiduciary Service

National Fiduciary Quality & Training Call Notes

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| **Call Information** | Date: Tuesday, May 16, 2017 |
| Time: 1:00 – 2:00 pm ET |
| TMS: VA 4212725 (Self-Study) |

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# Call Meeting Minutes

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| **Call Agenda Item** | **Details** |
| Quality Error Trends | **Fiduciary Quality Accuracy Director’s Performance Dashboard** The April 2017 Director’s Dashboard fiduciary accuracy measure is unavailable at this time. PA&I will post the weighted accuracy results as soon as they are available.  |
| P&F Service provided examples of error citations completed during the period of November 1, 2016, through January 31, 2017.**Administrative Errors*** Verifying field examination reports are of record, professional and proofread/edited prior to work item closure
* Ensuring that information in the beneficiary record is accurate and correct
* Notifying beneficiaries and their representatives of selection of the fiduciary to manage the beneficiary’s funds
* Updating BFFS to reflect information obtained from the corresponding Work Item

**Beneficiary Protection Errors*** Requiring an accounting when retroactive payment was made in excess of $10,000.00
* Applying Streamlined Oversight when the beneficiary is in a licensed facility, however, the facility license was expired
* Approving an accounting when all statements for the accounting period are not present
* Ensuring the established fiduciary checking account is properly titled
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| Local Quality BFFS Reports  | Pension and Fiduciary (P&F) service created two new local quality reports. Both reports are available in Beneficiary Fiduciary Field System (BFFS).* **HM – QRT- Local Quality by Date Range** **Report** allows individuals with the hub management or QRT user roles the option to run local quality on an employee within in the hub for a given date range.
* **My Local Quality Date Range Report** allows individual users to run their own quality report for a given date range. This allows users to view their quality for a given date range.
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| National Misuse IPR Review Update | **National Misuse Quality Accuracy** The cumulative National Misuse Quality Accuracy rate is 28% for the period of November 3, 2016- January 31, 2017 ]P&F Service provided examples of the most common errors identified in January 2017. * Incorrect receive date recorded in BFFS (25)
* Failure to establish the Misuse Allegation within two business days (20)
* Misuse Allegation Memorandum lacking all required information (20)
* Failure to merge fiduciary records (17)

As a reminder, any misuse related questions must be sent to P&F Service misuse mailbox at VAVBAWAS/CO/FIDMISUSE |
| Fiduciary Training Update | **LIE Centralized Training** Pension and Fiduciary (P&F) Service thanks all of the Quality Review and Training (QRT) personnel and instructors who participated in the first iteration of the new Legal Instruments Examiner (LIE) Centralized Training.  All courses listed in the LIE Centralized Training Curriculum are available in the VBA Learning Catalog. The courses may also be used as:* individual refresher training,
* cross-training, or
* new employee onboarding

**Temporary Suspension of Local Training Submissions**P&F Service is temporarily suspending fiduciary hub locally-created training submissions. Quarterly National Training Curriculum (NTC) reporting data indicate a majority of hubs are near to or exceeding, 100% compliance with the 40-hour annual training requirement for fiscal year 2017 (FY17).  * Hubs may to continue utilizing local materials and TMS items for training; however, P&F Service does not need to review or approve the content for the remainder of FY17, and the hours will not count toward station-selected NTC requirements.
* Regular local training submission will resume in FY18.
* Hubs must ensure that NTC requirements are satisfied for FY17.
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| Uploading Documents to VBMS  | The retirement of the Virtual VA (VVA) web application is scheduled for June 2017.  On April 1, 2017, Legacy Content Manager (LCM) system was deployed to allow users to have access to restricted documents that cannot be viewed in VBMS.  LCM is a read only. Effective June 1, 2017, VBMS is the electronic repository for fiduciary program document storage.  Hubs will continue to utilize Capture Point scanning capabilities for mail processing until the fiduciary program enters Centralized Mail processing.   P&F Service provided a live demonstration and discussion regarding uploading documents to VBMS. The VBMS job aid [*Adding Documents in VBMS eFolders*](http://vbaw.vba.va.gov/VBMS/docs/VBMS_Job_Aid_Adding_Documents_to_the_eFolder_Job_Aid_20140811.pdf)provides guidance on how to upload documents to the VBMS eFolder.Both the VBMS and LCM user guides are available on the VBA intranet to provide guidance on system navigation.  |

# Questions from the Field

P&F Service will provide responses to policy and procedural questions on the appropriate Frequently Asked Questions (FAQ) document within Knowledge Management.

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| **Area** | **Question** | **Answer** |
| **Quality Review**  | Will P&F Service report March quality errors for calculation of the hubs quality accuracy rate? Will the total number of April quality reviews be doubled? | No, P&F Service will not report quality accuracy for cases completed between February 27 and March 31, 2017, for inclusion on the Director’s Performance Dashboard Measures. P&F Service conducted and monitored quality during the aforementioned period for training and policy purposes only. P&F Service will resume reporting quality accuracy for cases completed on or after April 1, 2017. To ensure a statistically valid sample for the year, P&F Service will increase the number of reviews for each hub in April. |
| **VBMS eFolder** | Can anyone change the name of the document or just the person who inserted the document? Is there a process to remove a document that was erroneously inserted into a record? | Yes, if the user role allows someone to change the name of a document, the user may change the document details. There a process to remove documents that were incorrectly added to the eFolder in: [M21-1, Part III, Subpart ii, 4.G.2.d, *Requesting a Document Deletion in VBMS*](https://vaww.compensation.pension.km.va.gov/system/templates/selfservice/va_ka/portal.html?encodedHash=%23!agent%2Fportal%2F554400000001034%2Farticle%2F554400000014132%2FM21-1-Part-III-Subpart-ii-Chapter-4-Section-G-Folder-Maintenance%3FfromQuery%3Ddocument%20deletion)*.* Users may also move documents from one eFolder to another if the document is uploaded to the wrong eFolder.  |

# Ongoing Events

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| **Date** | **Event** |
| May 2, 2017 | Edits to FPM Chapter 5 Published |
| June 1, 2017  | Retirement of Virtual VA |
| June 19, 2017 | [LIE Centralized Training FY 2017-1 begins](https://vaww.fiduciary.km.va.gov/system/templates/selfservice/va_ka/#!agent/portal/554400000001030/article/554400000048209/Fiscal-Year-2017-Training-Schedules-and) |

# Next Monthly Quality & Training Call

The next National Fiduciary Quality & Training Call is on **Tuesday, June 20, 2017.**

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

Submit all comments and questions regarding these call notes and future calls to FFE.VBACO@va.gov.