# PENSION AND FIDUCIARY SERVICE

# policy Letter 21-16-02 –

# REFRESHER AND consistency TRAINING

# Instructor Lesson Plan

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| TMS # | VA 4184276 |
| Prerequisites | Prior to this lesson, hub personnel should have knowledge and experience using and applying the Fiduciary Program Manual (FPM) as it relates to the processing and reporting field examinations in the Benificiary Fiduciary Field System (BFFS). |
| target audience | The target audience for this mandatory training is trainee and experienced field examiners (FEs) and legal instrument examiners (LIEs). It may be used as station-selected training for all other fiduciary personnel. |
| Time Required | 1.0 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * PowerPoint Presentation * Policy Letter (PL) 21-16-02, *Field Examination Reporting Requirements and Performance of Quality Reviews* |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Physical or virtual classroom or private area suitable for participatory discussions * PowerPoint presentation * Large writing surface (easel pad, chalkboard, dry erase board, virtual board etc.) with appropriate writing materials, * Computer with associated projector and PowerPoint software to present the lesson material, as needed   Trainees require access to the following tools:   * VA Talent Management System (TMS) to confirm completion of learning session * VBA Intranet * Fiduciary Knowledge Management (KM) * Fiduciary Program Manual (FPM) * Beneficiary Fiduciary Field System (BFFS) * PL 21-16-02 |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides and Policy Letter. This will provide the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * When required, reserve the training room and/or schedule online meeting event. * Arrange for equipment such as computer, an overhead projector, and any other equipment (as needed). * Talk to office personnel who are most familiar with this topic to collect experiences to include them as examples in the lesson. * The lesson plan may be printed. It may be helpful to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes, information, or talking points that are needed in the margins. |
| Training Day | * Arrive as early as possible to ensure access. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are documented, as required. |

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| policy Letter 21-16-02 -  REFRESHER AND consistency TRAINING | | | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities/web-based environment | | |
| time required | | 1.0 hours | | |
| Purpose of Lesson  Explain the following: | | This lesson will educate trainees on the procedures for consistently executing Policy Letter (PL) 21-16-02. It will teach trainees to:   * Identify changes to VA Form 21P-4716a, *Adult Beneficiary - Field Examination Request and Report* * Identify field examination report fields that that have been removed or relocated within the FElux * Identify information that is no longer required to be documented on VA Form 21P-4703, *Fiduciary Agreement* * Know what information to include in the budget letter | | |
| Lesson Objectives  Discuss the following:  Slide 2 | At the end of this training, personnelwill be able to:   * Identify changes to VA Form 21P-4716a, *Beneficiary Field Examination Report* (previously titled *Adult Beneficiary - Field Examination Request and Report*) * Identify the field examination report fields removed or relocated within the FElux in the BFFS 3.0 release * Identify budget letter expenses * Identify changes in documentation requirements on VA Form 21P-4703, *Fiduciary Agreement* | | | |
| Explain the following: | At the conclusion of the lesson, the learning objectives will be reviewed. | | | |
| Motivation | This session is designed to provide hub personnel with consistent guidance on how to execute Policy Letter 21-16-02. | | | |
| VA Form 21P-4716a Updates  Slide 3 | | | | Effective May 24, 2016, VA Form 21P-4716a was revised and is now named Beneficiary Field Examination Request and Report.  The revised form is available online and VA Form 21P-4716a implements changes described in PL 21-16-02, and will be updated in BFFS on June 6, 2016.  P&F Service will no longer use VA Form 21P-3190, *Minor Beneficiary Field Examination Request and Report*.  The 21P-3190 will be removed from BFFS when the new 21P-4716a is updated in FElux.  Manual language will be updated with the release of the revised FPM. | |
| PL 21-16-02 Enclosure Update- FELux Fields  *Slide 4* | | | | P&F Service has revised PL 21-16-02 to include an enclosure documenting which fields in FELux were removed entirely, and which information is still required but relocated to a new place in FELux.  FEs will continue to document all beneficiary expenses within the FElux in BFFS. | |
| VA Form 21P-4703 Update  *Slide 5* | | | | FEs no longer complete the “Paid from VA Benefit” column on the VA Form 21P-4703, *Fiduciary Agreement.* The budget letter no longer contains the “Paid from VA” column.  All expenses listed in Part II – Expenses, Page 3 VA Form 21P-4703 must be documented within the FElux as indicated in FPM 2.D.13. | |
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| References  Slide 6 | | | | Explain where these references are located in the workplace.  All references are found in the Fiduciary Knowledge Management Site and Fiduciary Program Manual.   * Policy Letter 21-16-02, *Field Examination Reporting Requirements and Performance of Quality Reviews* * FPM 2.D.13, Specific Areas to Evaluate and Document for All IA and FB Field Examinations for Adults * M21-4, Chapter 3. Appendix C. STAR Fiduciary Quality Review Checklist * VA Form 21P-4716a, *Beneficiary Field Examination Report* * VA Form 21P-4703, *Fiduciary Agreement* * FELUX [Process Sheet](https://vaww.fiduciary.km.va.gov/system/templates/selfservice/va_ka/portal.html?encodedHash=) | |
| summary  Slide 7 | | | Today we reviewed changes to:   * VA Form 21P-4716a, *Beneficiary Field Examination Report* * FElux reporting fields * VA Form 21-4703, *Fiduciary Agreement*, reporting fields * Budget letter expenses | |
| wRAP-UP/next steps  Slide 8 | | | Remind the trainees to complete the on-line survey in TMS to receive credit for completion of the course. The survey is available on their To-Do List under item VA 4184276, and must be completed by July 1, 2016. | |
| QUESTIONS  *Slide 9* | | | Questions can be emailed to [FFE.VBACO@va.gov](mailto:FFE.VBACO@va.gov) | |