Pension and Fiduciary Service Instructor-led Training Guide

Lesson Title	Overview of Share
TMS Item Number	VA 4212740
Learning Hours	1.5
Target Audience	Legal Instruments Examiners Fiduciary Service Representatives Field Examiners

Table of Contents

Lesson Description

This course teaches personnel an overview of the VA system, Share, and how to inquiry and review beneficiary corporate records.

Lesson Objectives

By the end of this lesson, given the Share User's Guide, learners will:

- Define the Purpose of Share
- Navigate to and Access Share

Learners will also be able to conduct the following actions:

- BIRLS Inquiry
- Pending Issue File Inquiry
- Beneficiary Payment Data Inquiry
- Corporate Inquiry and Navigate the:
    - Claims/Denials Screen
    - Awards/Ratings Screen
- Search All in List
- SSA Inquiry

Lesson Reference

- Share User's Guide: http://vbaw.vba.va.gov/bl/21/Systems/share.htm

Materials and Aids

Lesson materials available in the VBA Learning Catalog:

- Overview of Share PowerPoint Presentation
- Overview of Share Instructor Guide

Training Area and Tools

The following are required to ensure the trainees are able to meet the lesson objectives:

- Classroom or private area suitable for participatory discussions
- Seating, writing materials, and writing surfaces for trainee note taking and participation
- Casework to utilize for demonstration and practical exercises
- Computer with Share access and PowerPoint software to present the lesson material

Trainees require access to the following tools:

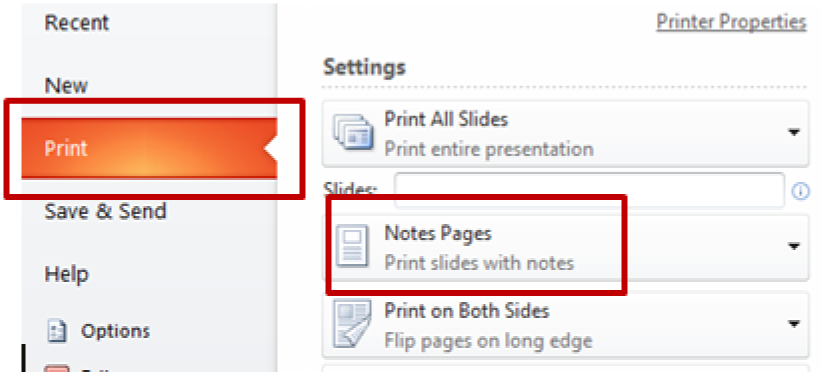
- VA Talent Management System (TMS) to complete the assessment and survey
- Pension and Fiduciary Service – Fiduciary Knowledge Management Site
- Share application from VBAPPS in the Windows Start Menu
- Beneficiary eFolder

Pre-Planning

- ☐ Become familiar with all training materials by reading the Instructor-led Training Guide, PowerPoint slides (including the instructor speaking notes in the notes area below each slide), and the Share User's Guide. Preparation will provide you the opportunity to see the connection between all lesson materials, which will allow for a more structured presentation during the training session.
- ☐ Become familiar with the content of the Share User's Guide and its association to the presentation.
- ☐ **Prepare Casework**: Select several beneficiary cases prior to training day to show during live demonstration. It is recommended to select records for both VA pension and service-connected compensation recipients, as well cases with a fiduciary appointment.
- ☐ Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between the lesson materials, demonstration, and to ensure your timing is on track with the length of the lesson.
- ☐ Make appropriate training room reservations and accommodations.
- ☐ Ensure the instructor computer and overhead projector work properly.
- ☐ Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson.
- ☐ This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins.

Printing PowerPoint Instructor Notes

In preparation for the training, print the PowerPoint to include the instructor notes. In PowerPoint, select the following: ***File > Print > Notes Page***. Also, select ***Print on Both Sides*** if your printer allows it to save paper.



Training Day

- ☐ Arrive as early as possible to ensure access to the facility and computers.
- ☐ 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.
- ☐ Make sure that the instructor has login access to any other necessary programs and VBA systems for any demonstration(s).
- ☐ The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. Forward the attendance record to the Regional Office Training Manager when complete.

Survey

Remind the trainees to complete the survey in TMS to receive credit for completion of the course. The survey provides Pension and Fiduciary Service with feedback and satisfaction on the lesson.

Questions and Comments

Please contact the Pension and Fiduciary Service – Fiduciary Training Staff with any questions or comments on this Instructor-led Training Guide or the other materials associated with the lesson at PFTNGQUALOVRST.VBACO@va.gov.