Pension and Fiduciary Service

PMC VSR Basic Core Course  
Phase 4: Introduction to Pension Management

Pension Claims eFolder/Records Management

Appendix A

February 2024

For Your Review

You will have **15-20 minutes** to complete this exercise. Access the **Locating and Updating a Claimant Record** job aid. Read the scenarios and then write the appropriate system or application next to the question.

1. You have received new evidence that contains information about dependents. You review the claims file and do not find any information regarding dependents. You determine that you need to update the claims file to reflect your findings regarding the new dependents.
   1. What system will you need to access to update dependent information?
   2. Where in the system do you need to access to review and add dependent information?
2. You have attempted to reach a claimant by phone regarding additional information needed but have been unable to make contact.
   1. What system will you need to access to document your unsuccessful phone calls to the claimant?
   2. Where in the system do you need to document this information?
3. You have received a new claim. You know your first step is to perform an SSA inquiry.
   1. What system will you need to access to perform the SSA inquiry?
   2. What information do you need to access the eFolder to begin the inquiry?
4. You have received a claim where you notice possible toxic exposure.
   1. What application would give you a single access point to the Veteran’s deployment history?
   2. Once in the application, what information can claims processors use to search for an individual?