Pension and Fiduciary Service

PMC VSR Core Course

Common VA References

Job Aid

February 2024

This job aid serves as a quick source for common references used by the PMV VSR.

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| **Reference**  | **Location(s)**  | **Description**  |
| **38 CFR Title****38 USC**  | * **e-CFR website**
* **CPKM**
 | * Title 38 of the United States Code (USC) outlines the role of Veterans’ Benefits
* Title 38 is the principle set of rules and regulations issued by federal agencies of the United States regarding
	+ Pension
	+ Bonuses, and
	+ Veterans’ relief
* Organized in numerical order from the first regulation (3.1 -3.2600)
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| **M21-1** **Adjudication** **Procedures** **Manual** | * **CPKM**
* **Compensation Service Intranet Home Page**
* **Pension and Fiduciary Homepage**
 | Most commonly used manual for PMC VSRs* Known as “The Manual”
* Contains interpretations of the CFRs
* Consist of the following parts:
	+ Part 1 – Claimants’ Rights and Claims Processing Centers and Programs
	+ Part 2 – Intake, Claims Establishment, Jurisdiction, and File Maintenance
	+ Part 3 – The Development Process
	+ Part 4 – Examinations
	+ Part 5 – The Rating Process
	+ Part 6 – The Authorization Process
	+ Part 7 – Dependency
	+ Part 8 – Special Compensation Issues
	+ Part 9 – Pension Survivors’ Pension, and Parents’ Dependency and Indemnity Compensation
	+ Part 10 – Benefits Administration and Oversight
	+ Part 11 – Notice of Death, Benefits Payable at Death, and Burial Benefits
	+ Part 12 – Dependency and Indemnity Compensation (DIC) and Other Survivors’ Benefits
	+ Part 13 – Eligibility Determinations and Information Sharing for Other Benefits
	+ Part 14 – Matching Programs
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| **M21-3 (Part II) Training Program** | * **CPKM**
 | Provide information on the creation of training programs for PMC training programs.Consists of the following parts:* Section A: Pension Management Center (PMC) Pension National Training Curriculum (PNTC)
* Section B: Pension Management Center (PMC) Core Pension Training (CPT)
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| **M21-1 4 Manual** | * **CPKM**
* **Compensation Service Intranet**
* **Pension and Fiduciary Home Page**
 | Provides a logistical overview of how the stations functionConsists of the following parts:* Appendix A – Regional Office Station Numbers, Payee Codes, and Work-Rate Standards
* Appendix B – End Product Codes
* Appendix C – Index of Clam Labels
* Appendix D – Index of Claim Stage Indicators
* Appendix E – Index of Corporate Flashes and Special Issues
* Appendix F – Fiduciary Workflow Stage Indicators and Administrative Tasks
* Chapter 1 – Overview
* Chapter 2 – Workload Management Plans
* Chapter 3 – National Quality Reviews
* Chapter 4 – Claims and Appeals Processing Timeliness
* Chapter 5 – Strategic Oversight and Analysis Review
* Chapter 6 – Quality Review Team (QRT)
* Chapter 7 – Pension Management Center (PMC) National Quality Reviews and Quality Review Team (QRT)
* Chapter 8 – Fiduciary Hub (Hub) National Quality Reviews and Quality Review Teams (QRT)
* Chapter 9 – Fiduciary Hubs (Hub) Systematic Analysis of Operations (SAO)
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| **M21-5 Appeals and Reviews** | **CPKM** | The M21-5, Appeals and Reviews, serves as a general guide for processing legacy appeals for compensation and higher-level reviews (HLRs) under the Appeals Modernization Act (AMA).Consists of the following parts:* Chapter 1 – Field Oversight
* Chapter 2 – National Training Programs
* Chapter 3 – Quality Assurance
* Chapter 4 – AMA Control & Other Activities
* Chapter 5 – HLR Procedures
* Chapter 6 – Controlling Legacy Appeals
* Chapter 7 – Legacy Appels Procedures
* Agent and Attorney Fee Processing
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| **Fiduciary Program Manual** | **CPKM** | [The Fiduciary Program Manual (FPM)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/topic/554400000002708/Fiduciary-Program-Manual), serves as a general guide for activities and decisions inherent to providing fiduciary assistance to VA beneficiaries. Consists of the following parts:* Part 1 – General Fiduciary Process
* Oversight of Beneficiary’s Estate and Funds
* Part II – Oversight of Beneficiary’s Estate and Funds
* Part III - Fiduciary Appeals
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| **M27-1 Benefits Assistance Service (BAS) Procedures** | **Web Automated Reference Material System (WARMS)** | BAS is responsible for ensuring timely and accurate benefit information and services are provided to Servicemembers, Veterans, dependents, and survivors. Consists of the following parts:* Part 1 - VBA Public Contact and Direct Services
* Part II - VBA Outreach
* Part II - VBA Web Communication
* Part IV – Quality and Training
* Part V – Access and Business Applications
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| **P&F Service Inquiries** | **CPKM Portal** | Provides assistance to inquiries from the PMCs clarity regarding policies and procedures |
| **P&F Service PACT Act – Subpage** | **CPKM Portal** | Provides information regarding the PACT Act Dependency and Indemnity Compensation (DIC) and Survivor claims. ILER Guidance PACT Act General Fact Sheet Link to Field Inquiry Tool (FIT) |
| **VSR Assistant** | **Compensation Service Intranet**  | The VSR Assistant can help VSRs quickly and accurately develop and adjudicate various types of claim to include CHAMPVA, DEA, hospital adjustments, incompetency, income/net worth, and due process.Contains job aids for PMC VSRs.The [PMC VSR Job Aids](http://epss.vba.va.gov/vsr_assistant/pmc_vsr/index.html) site provides immediate, online access to jobs aids made available during the PMC VSR Core Training. These job aids include simple checklists, guided procedures, task flows, and decision support tools. |