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) |
| **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 |
| **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) |
| **M21-1 4 Manual** | * **CPKM** * **Compensation Service Intranet** * **Pension and Fiduciary Home Page** | Provides a logistical overview of how the stations function  Consists 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) |
| **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 |
| **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 |
| **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 |
| **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. |