Pension and fiduciary service

PMC VSR Basic Core Course

Phase 3: PMC VSR Resources

Phase 3 Knowledge Enhancer Preparation (KE Prep)

Appendix A: Worksheet

**December 2024**

Phase 3 Worksheet

Part A: Spot the VA Term

Review the letter excerpt and determine if all the VA terms and acronyms are correct. Circle any errors and write the correct term (if any).Use the **Common VA Terms** job aid for assistance reviewing the following letter excerpt.

Dear Mr. Caruso:

We made a decision on your claim for Dependency and Indemnity Compensation (DEA), Survivors Pension, and Accrued benefits received on October 7, 2019.

This letter tells you about your entitlement amount and payment start date and what we decided. It includes a copy of our rating decision that gives the evidence used and reasons for our decision. We have also included information about additional benefits, what to do if you disagree with our decision, and who to contact if you have questions or need assistance.

**Your Award Amount and Payment Start Date**

Your monthly entitlement amount is shown below:

|  |  |  |
| --- | --- | --- |
| **Monthly Entitlement Amount** | **Payment Start Date** | **Reason For Change** |
| $3,227.00 | Feb 1, 2019 | Eligible for Veteran’s Month of Death (DOD) Rate |
| 1,645.81 | Mar 1, 2019 | Dependency and Indemnity Compensation (DIC) Benefits Granted |

We're paying you as a surviving spouse with no dependents. Let us know right away if there is any change in your marital status.

**You Can Expect Payment**

Your payment begins the first day of the month following your effective date. You will receive a payment covering the initial amount due under this award, minus any withholdings, in approximately 15 days. Payment will then be made at the beginning of each month for the prior month. For example, benefits due for May are paid on or about June 1.

**What We Decided**

* We granted dependency and indemnity compensation (DIC) effective February 14, 2019.
* We have approved an additional allowance for Aid and Attendance (A/R) effective March 1, 2019.
* We granted Dependents’ Educational Assistance (DEP) effective February 14, 2019.
* We have denied your claim for Survivors Pension benefits.

Part B: Seek and Find

Use the **VBA Intranet and Pension Home Page** and **Common VA References** job aidsto answer the following questions.

1. Which regulation of the Title 38 Code of Regulation (CFR) includes information on marriage dates? (5 Points)

a. 3.11

b. 3.54

c. 3.59

d. 3.804

1. Which section of the Pension and Fiduciary Service Home Page includes a link to disability examination worksheets? (5 Points)

a. Contract Management Home Page

b. Rating Consistency Review

c. Training Homepage

d. Quality Assurance Homepage

1. What is the email address for Pension and Fiduciary’s Policy and Procedures inquiries? (5 Points)

a. VA/VBA/CO/POL & PROC

b. VAVBA/CO/P&F POL & PROC

c. VA/CO/P&F POL & PROC

d. VAVBAWAS/CO/P&F POL & PROC

1. The Veteran served in active duty February 21, 1965, through March 3, 1973. What is the name of the wartime period for this Veteran? (5 Points)

a. Vietnam Era

b. Gulf War

c. Mexican Border Period

d. Korean Conflict

1. Where would you go to download VA Form 21P-5427? What is the name on the form? (10 Points)
2. List at least three references and/or regulations where you would find information on age requirements of a child. (10 Points)
3. What reference would you use to learn more about end product codes and work-rate standards for quantitative measurements? Provide the online location you used to find the reference. (15 Points)
4. What job aid would you use for examples of when and how effective dates are applied to PACT Act related accrued/substitution claims. (20 Points)

Part C: Trivia

Use the **Pension Systems and Applications** job aid to match the definition with the system/application. Group A will provide the definitions listed below to Group B. Group B will look up the answers using the job aid and write the correct answers on whiteboard/flip chart. Group A will then verify that the answer is correct.

**Definition:**

1. This program is used to house information and notification letters that are restricted from VBMS, such as Federal Tax Information.
2. A PMC VSR uses this system to request verification of service as well as service treatment records for Veterans discharged before certain dates.
3. This application allows users to inquire against legacy information such as BIRLS, COVERS, and other agencies information.
4. A PMC VSR uses this system to generate awards for beneficiaries.
5. This program is used to send outbound correspondence addressed to claimants and representatives.
6. A PMC VSR uses this system to review claimant’s record for potential debts owed to VAMC.
7. A PMC VSR uses this system to request verification of personnel records after specific dates of discharge.
8. A PMC VSR uses this application to create development letters to the Veteran or claimant requesting additional information needed to process the pending claim.
9. All supplemental claims must be established in this system
10. This system is used to review the eFolder and insert documents into the electronic file.
11. *The system* all claims processors must use when reviewing and processing certain service-connected claims that may be subject to a TERA.

Part D: Name that Phase!

Use the **Curriculum Guide Learning Aid** to identify the correct phase. Work in groups of 4, and record answers in Part D of the worksheet. Be prepared to share your answers.

1. I am the phase in which you would find material that familiarizes you with roles, responsibilities, and operations:
2. Phase 1
3. Phases 2 and 3
4. Phase 5 and 6
5. \_\_\_\_\_\_\_is more foundational in which the focus is on initial screening, the end products you will use, the importance of understanding the date of claim, and establishing claims
   1. Phase 3
   2. Phase 4
   3. Phase 5
6. This phase expands the trainees’ skill levels by introducing them to more complex subject matters and advanced techniques.
   1. Phase 4 and 5
   2. Phase 5.1a-5.6
   3. Phase 3, 4 and 5
7. I am the phase that helps the trainee become more proficient via on-the-job training.
   1. Phase 4
   2. Phase 2
   3. Phase 6
8. \_\_\_\_\_\_ is used to identify and ensure an understanding of fundamental concepts and skills.
   1. Phase 1-4
   2. Phase 5-6
   3. Phase 6

Part E: Identifying Core Values and Characteristics

Divide into 2 groups to complete Part E of the worksheet. Use the VA Core Values and Characteristics Quick Reference to identify the correct core value and characteristic and record answers for each statement next to the bullet point. Each group will compare answers and determine if the other is correct or incorrect.

1. Thoughtful and decisive in leadership, accountable for my actions
2. Fulfill my individual responsibilities and organizational responsibilities.
3. Strive for the highest quality and continuous improvement.
4. Maintain the trust and confidence of all with whom I engage.
5. Treat all those I serve and with whom I work with dignity and respect.
6. Adhere to the highest professional standards.
7. Be driven by an earnest belief in VA’s mission.
8. Be Veteran-centric