Pension and fiduciary service

PMC VSR Core Course

Phase 4: Introduction to Pension Management

Phase 4 Knowledge Check Preparation

Appendix A: Worksheet

February 2020

Phase 4 Worksheet

Part A: What’s the Question?

Select the correct question based on the answer given.

1. This stage is for reviewing all incoming applications, correspondence, and evidence to determine if a claim warrants priority processing because of its nature or facts.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
2. This stage addresses all issues pertaining to a single claim by denying benefits when entitlement does **not** exist.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
3. This stage is applicable to claims that are requesting additional benefits such as aid and attendance or housebound benefits.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
4. This stage provides the claimant with full knowledge of the decision made and his/her rights pertaining to that decision.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
5. This stage addresses all issues pertaining to a single claim by awarding benefits when entitlement exists.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
6. This stage assists claimants in obtaining evidence to substantiate the claim before VA makes a decision.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Ready for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?
7. This stage reviews all evidence to determine if an immediate denial is warranted.
   1. What is Initial Screening stage?
   2. What is Claim Development stage?
   3. What is Read for Decision?
   4. What is Award Determination/Promulgation stage?
   5. What is Claimant Notification stage?

Part B: Know the Claim Type

Match the definition with the correct claim type. Write the corresponding letter (a, b, c, d, e, or f) next to the correct claim type. Use the **Claim Types** job aid for assistance.

1. A monetary benefit payable to a low-income, un-remarried surviving spouse and/or unmarried children of a deceased Veteran with wartime service.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)
2. A one-time benefit that a surviving spouse may receive for the last month that the Veteran was entitled to before death.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)
3. An additional monetary benefit for Veterans and survivors who are eligible for pension benefits and who are housebound. VA Form 21-2680 is associated with this claim type.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)
4. A benefit generally payable to survivors of Veterans who died from service-connected disabilities.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)
5. A monetary benefit payable to low-income wartime Veterans. Also referred to as live or disability pension.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)
6. A record received by VA matching programs that indicates a contradiction or mandated review, which requires action by a PMC VSR.
   1. Special Monthly Pension (SMP)
   2. 800 Series Work Items
   3. Survivors Pension
   4. Month of Death (MOD)
   5. Veteran’s Pension
   6. Dependency and Indemnity Compensation (DIC)

Part C: Update the Record

Read each scenario and then answer the questions about updating the claimant’s record. Use the **Locating and Updating a Claimant Record** job aid for assistance in updating the record in a system or application.

**Scenario 1:** You have received a new claim. You know your first step is to perform an SSA inquiry.

What system will you need to access to perform the SSA inquiry?

What information do you need to access the eFolder to begin the inquiry?

**Scenario 2:** **You received a call from a surviving spouse** regarding a development letter she received in the mail. You document the call on VA Form 27-0820 (Report of General Information)

**What system(s) will you need to access to upload VA Form 27-0820? (Select all that apply)**

1. **VBMS**
2. **PIES**
3. **VVA**
4. **SHARE**
5. **COVERS**

**Where in the system would you find this VA form once uploaded?**

**Scenario 3: You have received a phone call from a Veteran. You verify that the call is from the Veteran stating that his bank account has changed and needs to update his direct deposit information.**

**What system will you need to access to update the direct deposit information?**

**Where in the system do you update the direct deposit information?**