



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course Phase 4: Introduction to Pension Management

Phase 4 Knowledge Check Preparation

Appendix A: Worksheet

October 28, 2016

Version 1.0

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.

Phase 4 Knowledge Check Preparation Appendix A

- a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
2. This stage address all issues pertaining to a single claim by denying benefits when entitlement does **not** exist.
 - a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
 3. This stage makes the appropriate award adjustments following changes to income subsequent to the original claim.
 - a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
 4. This stage provides the claimant with full knowledge of the decision made and his/her rights pertaining to that decision.
 - a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
 5. This stage address all issues pertaining to a single claim by awarding benefits when entitlement exists.
 - a. What is Initial Screening stage?
 - b. What is Claim Development stage?

Phase 4 Knowledge Check Preparation Appendix A

- c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
6. This stage assists claimants in obtaining evidence to substantiate the claim before VA makes a decision.
- a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?
7. This stage reviews all evidence to determine if an immediate denial is warranted.
- a. What is Initial Screening stage?
 - b. What is Claim Development stage?
 - c. What is Award Determination/Promulgation stage?
 - d. What is Claimant Notification stage?
 - e. What is Maintenance?

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.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims

2. A one-time benefit in which a surviving spouse may receive pension or DIC for the last month that the Veteran was entitled to before death.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims

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.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims

Phase 4 Knowledge Check Preparation Appendix A

4. A benefit generally payable to survivors of Veterans who died from service-connected disabilities.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims
5. A monetary benefit payable to low-income wartime Veterans. Also referred to as live or new pension.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims
6. A record received by VA matching programs that indicates a contradiction or mandated review, which requires action by a PMC VSR.
 - a. Special Monthly Pension (SMP)
 - b. 800 Series Work Items
 - c. Survivors Pension
 - d. Month of Death (MOD)
 - e. Veteran's Pension
 - f. Dependency and Indemnity Compensation (DIC) Claims

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)

- a. VBMS
- b. PIES
- c. VVA
- d. SHARE
- e. 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?

Part D: Think It Through

Read each scenario and determine the type of caller, the information needed to verify the caller, and the type of information that can be provided to the caller. Refer to the **Provide Benefit Information** job aid for assistance.

Scenario 1: The VA receives a call from the living Veteran's dependent spouse responding to a development letter they received in the mail. The VSR reviews the eFolder and locates VA Form 21-0845 designating the caller as the authorized individual. The caller was able to verify the security question under box 11 on the form in addition to the ID protocol.

1. Type of caller:
2. Information needed to verify caller:
3. Type of information that can be provided to the caller:

Scenario 2: The Veteran calls to determine the status of his original pension claim. The Veteran stated his full name, SSN, and date of birth. The VSR verified the ID protocol with the evidence contained in the Veteran's corporate record.

1. Type of caller:
2. Information needed to verify caller:
3. Type of information that can be provided to the caller:

Scenario 3: The VSR receives a call from Jan Scott, VSO Representative from the American Legion. Jan is inquiring about the documentation necessary to substantiate the Veteran's claim. The VSR reviews the Veteran's eFolder and is unable to locate VA Form 21-22 designating Jan Scott as the POA. The VSR also reviewed the corporate record and realized that there is no POA in the system.

1. Type of caller:
2. Information needed to verify caller:
3. Type of information that can be provided to the caller: