PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5, Part 1(a): Initial Screening and Claim Establishment

Phase 5, Part 1(a) Knowledge Check Preparation

Appendix B

October 28, 2016

Version 1.0

Knowledge Check Preparation Worksheet

Part A: Initial Screening

Using Appendix A: Example Claim, answer the following questions regarding the initial screening process.

1. Is the application dated before or after 3/24/2015?

2. Is the application substantially complete? Provide the rationale for your decision.

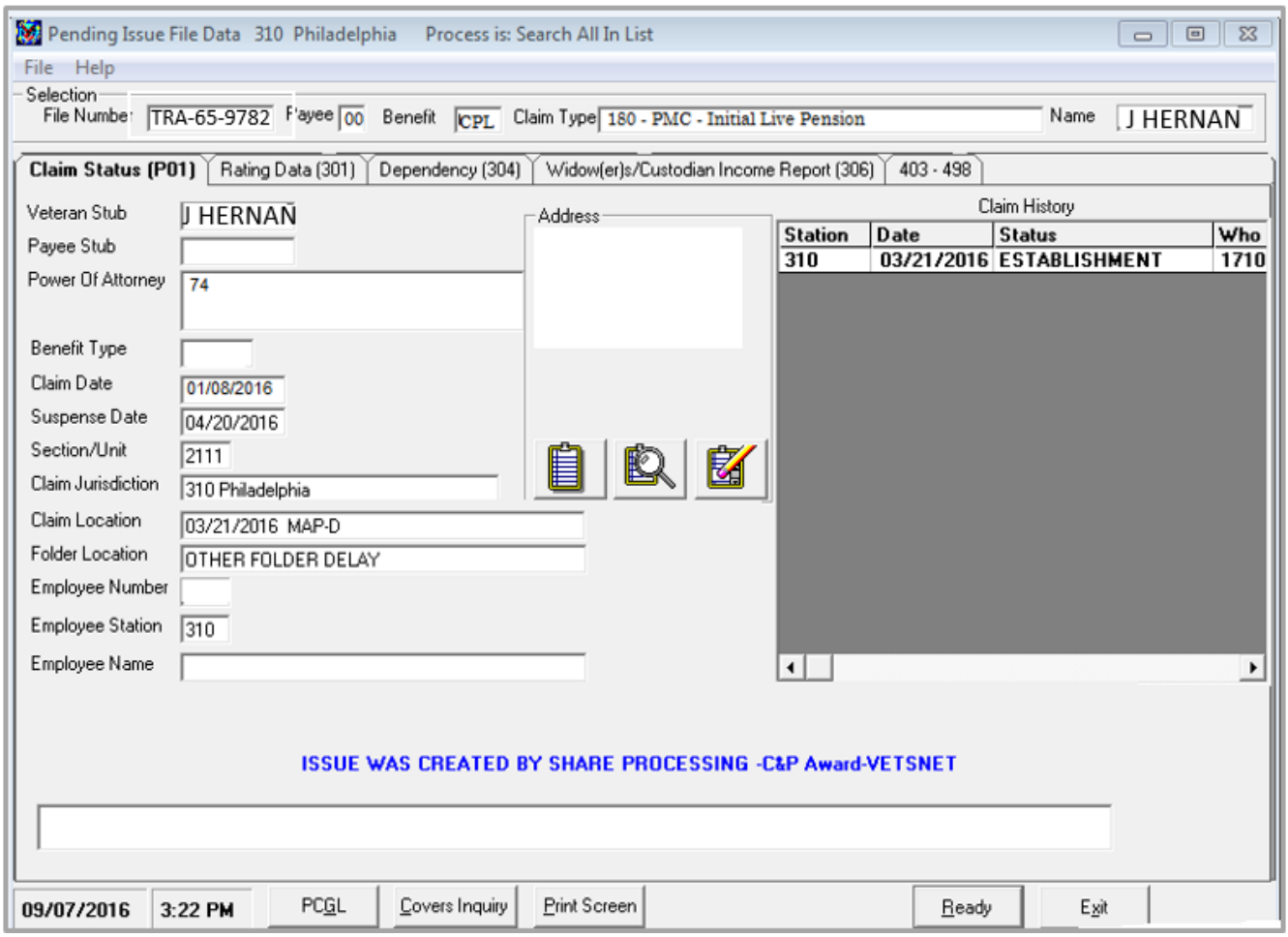
3. Does this claim meet the requirements of a FDC program? Provide the rationale for your decision.

4. Does this claim meet the requirement for special processing? Provide the rationale for your decision.

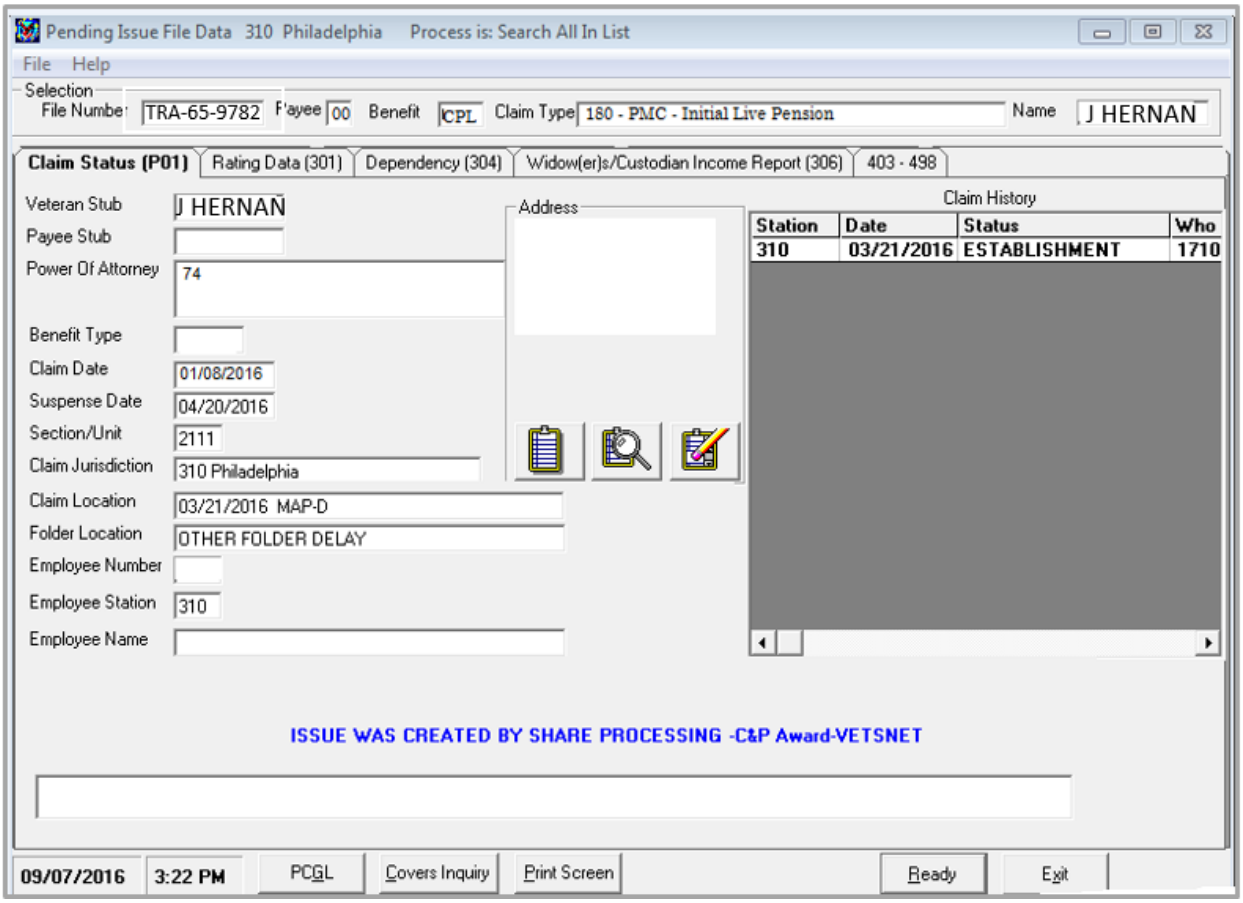
5. Does this claim meet the characteristics of an Old Law pension? Provide the rationale for your decision.

6. What is the DOC for this claim? Provide the rationale for your decision.

7. Using the SHARE screen below, determine if the DOC is correct in SHARE. Provide rationale for your decision.



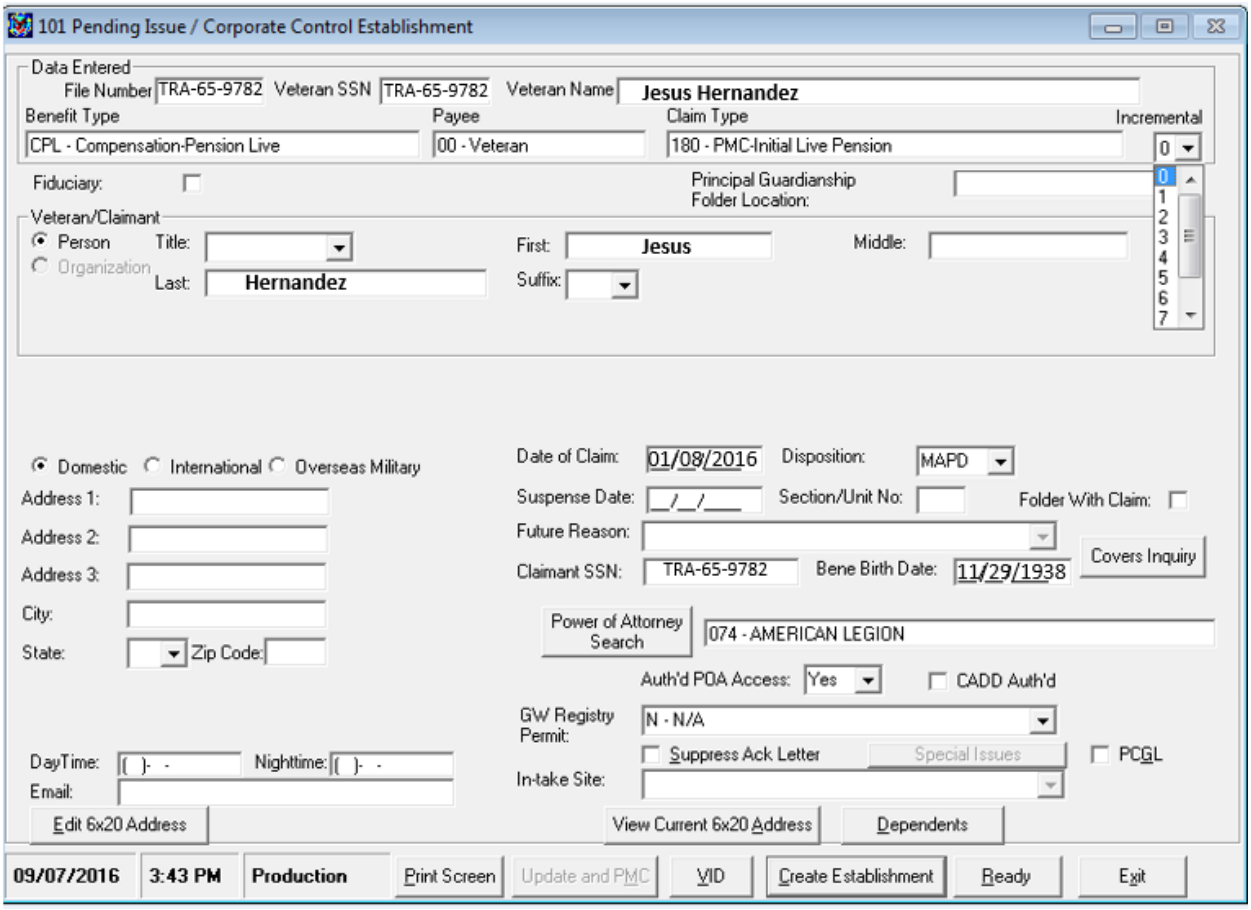
8. Review the SHARE screen below. Using the example claim and **End Product (EP) Code** job aid, determine if the EP code is correct. Provide the rationale for your decision.

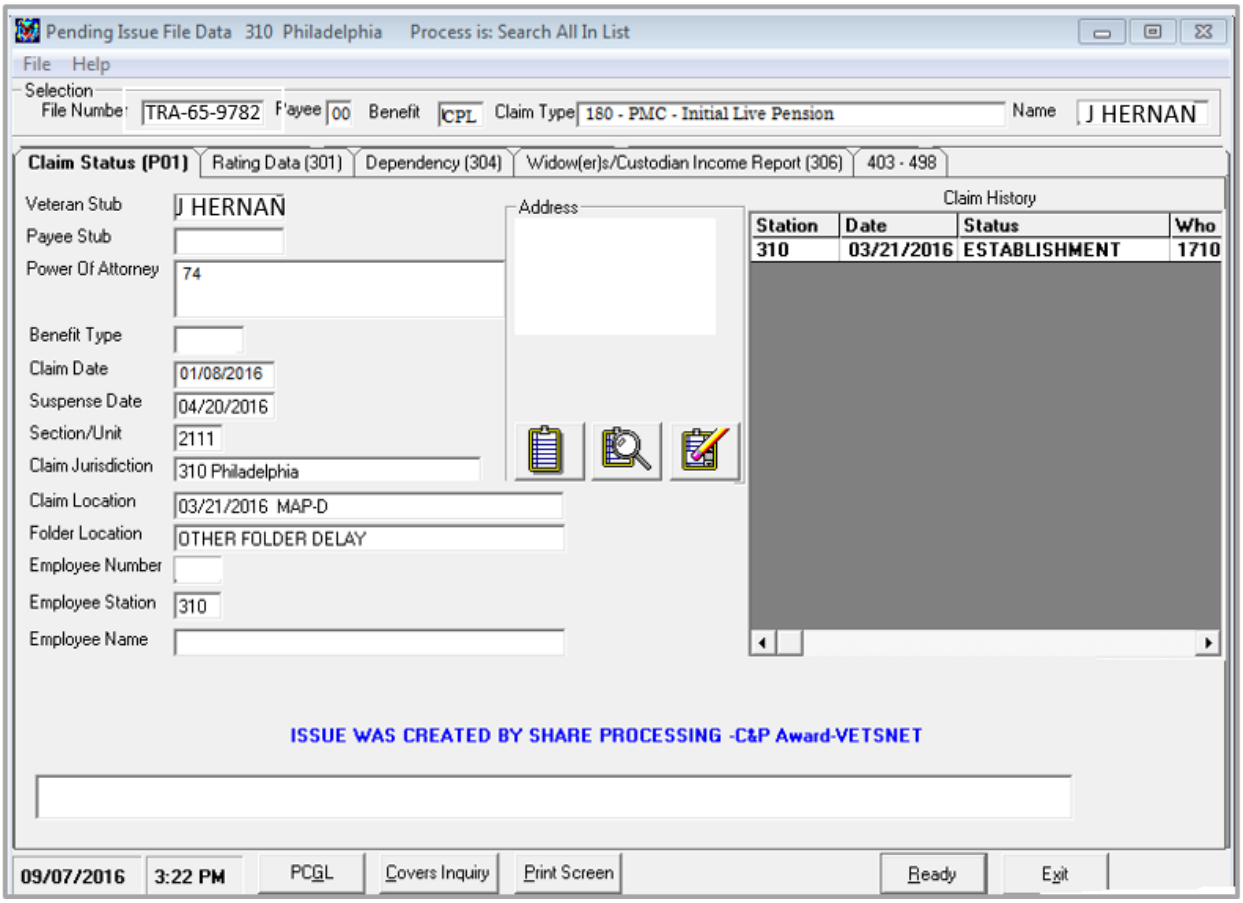


9. Does the claimant list a POA? If POA is listed, is POA accredited. Remember to use the Accreditation Search.

Part B: Claim Establishment

Use the example claim and the SHARE screens below to determine if the claim has been established. Provide rationale for your decision.




Pending Issue File Data 310 Philadelphia Process is: Search All In List
File Help
Selection
File Number: TRA-65-9782
Payee: 00
Benefit: CPL
Claim Type: 180 - PMC - Initial Live Pension
Name: J HERNAN
Claim Status (P01)
Rating Data (301)
Dependency (304)
Widow(er)s/Custodian Income Report (306)
403 - 498
Veteran Stub: J HERNAN
Payee Stub:
Power Of Attorney: 74
Benefit Type:
Claim Date: 01/08/2016
Suspense Date: 04/20/2016
Section/Unit: 2111
Claim Jurisdiction: 310 Philadelphia
Claim Location: 03/21/2016 MAP-D
Folder Location: OTHER FOLDER DELAY
Employee Number:
Employee Station: 310
Employee Name:
Address
Claim History
Station Date Status Who
310 03/21/2016 ESTABLISHMENT 1710
ISSUE WAS CREATED BY SHARE PROCESSING -C&P Award-VETSNET
09/07/2016
3:22 PM
PCGL
Covers Inquiry
Print Screen
Ready
Exit