



## 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

**Phase 5, Part 1(a) Knowledge Check Preparation**  
**Appendix B**

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**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.

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7. Using the SHARE screen below, determine if the DOC is correct in SHARE. 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 |

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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.

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 Address  
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

Claim History

| Station | Date       | Status        | Who  |
|---------|------------|---------------|------|
| 310     | 03/21/2016 | ESTABLISHMENT | 1710 |

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

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**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.

The screenshot displays the SHARE software interface for a '101 Pending Issue / Corporate Control Establishment'. The window title is '101 Pending Issue / Corporate Control Establishment'. The 'Data Entered' section includes: File Number (TRA-65-9782), Veteran SSN (TRA-65-9782), and Veteran Name (Jesus Hernandez). The 'Benefit Type' is 'CPL - Compensation-Pension Live', 'Payee' is '00 - Veteran', and 'Claim Type' is '180 - PMC-Initial Live Pension'. The 'Incremental' value is 0. The 'Veteran/Claimant' section is set to 'Person' with 'Title' as a dropdown, 'First' name as 'Jesus', and 'Last' name as 'Hernandez'. The 'Date of Claim' is '01/08/2016' and 'Disposition' is 'MAPD'. The 'Claimant SSN' is 'TRA-65-9782' and 'Bene Birth Date' is '11/29/1938'. The 'Power of Attorney Search' field contains '074 - AMERICAN LEGION'. The 'Auth'd POA Access' is 'Yes'. The 'GW Registry Permit' is 'N - N/A'. The 'In-take Site' is a dropdown menu. The bottom status bar shows the date '09/07/2016', time '3:43 PM', and mode 'Production'. Navigation buttons include 'Print Screen', 'Update and PMC', 'VID', 'Create Establishment', 'Ready', and 'Exit'.

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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 Address  
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

Claim History

| Station | Date       | Status        | Who  |
|---------|------------|---------------|------|
| 310     | 03/21/2016 | ESTABLISHMENT | 1710 |

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