Pension and Fiduciary (P&F) Service

Pension Quality Call

Date: September 20, 2022
TMS: # VA XXXXXXX

AGENDA TOPICS

AGENDA ITEMS

Agenda item: STAR Dashboard Updates

Presenter: Jennifer Kunkel, Analyst

Target Audience:
QRT and Management

Discussion:

Updates to the QMS Pension STAR dashboard on August 5, 2022, include the following:

- Added a global drop-down filter to display the information on the dashboard for national or station specific metrics. Station specific tiles were removed for this feature.
- Added new tiles to break down BE and Claim based monthly accuracy by Authorization and Rating claims
- Added two new tiles to show the number of errors pending more than 30 days after notified, and the average number of days an error takes to complete from date of notification. These metrics exclude cases with recons.
- The number of deselects per EP were added to the tile: *Total EPs Reviewed by Station*.

Please submit any additional comments or suggestions to the Pension and Fiduciary (P&F) Service Quality mailbox.

References
✓ QMS Pension STAR Dashboard   Pension STAR Dashboard | Salesforce

Agenda item: Fourth Quarter Error Trends

Presenter: Jennifer Kunkel, Analyst

Target Audience:
QRT and Management

Discussion:

A trend analysis was conducted regarding errors cited on National Pension Quality Reviews completed during the 3rd and current 4th quarters of FY22.

The chart below shows a breakdown of the errors cited during the National STAR Quality Reviews completed between May 2022 and August 2022 (transactions completed between **April 1, 2022, and July 31, 2022**). STAR reviews are performed the following month after a claim is completed.

A total of 200 claims were reviewed,124 Authorization (non-rating claims) and 76 rating claims.

Station	Review Category	Total # of Claims Reviewed	Total # of Errors Cited	# of BE Errors Cited
310	Authorization	36	7	0
	Rating	32	16	0
	Station Total	*68*	*23*	*0*
330	Authorization	12	3	0
	Rating	32	9	0
	Station Total	*44*	*12*	*0*
335	Authorization	76	28	6
	Rating	12	7	1
	Station Total	*88*	*35*	*7*
	Total	**200**	**70**	**7**

Of the **70** cited errors, **4** recons were submitted**:** 1 error was overturned, 3 are still pending.

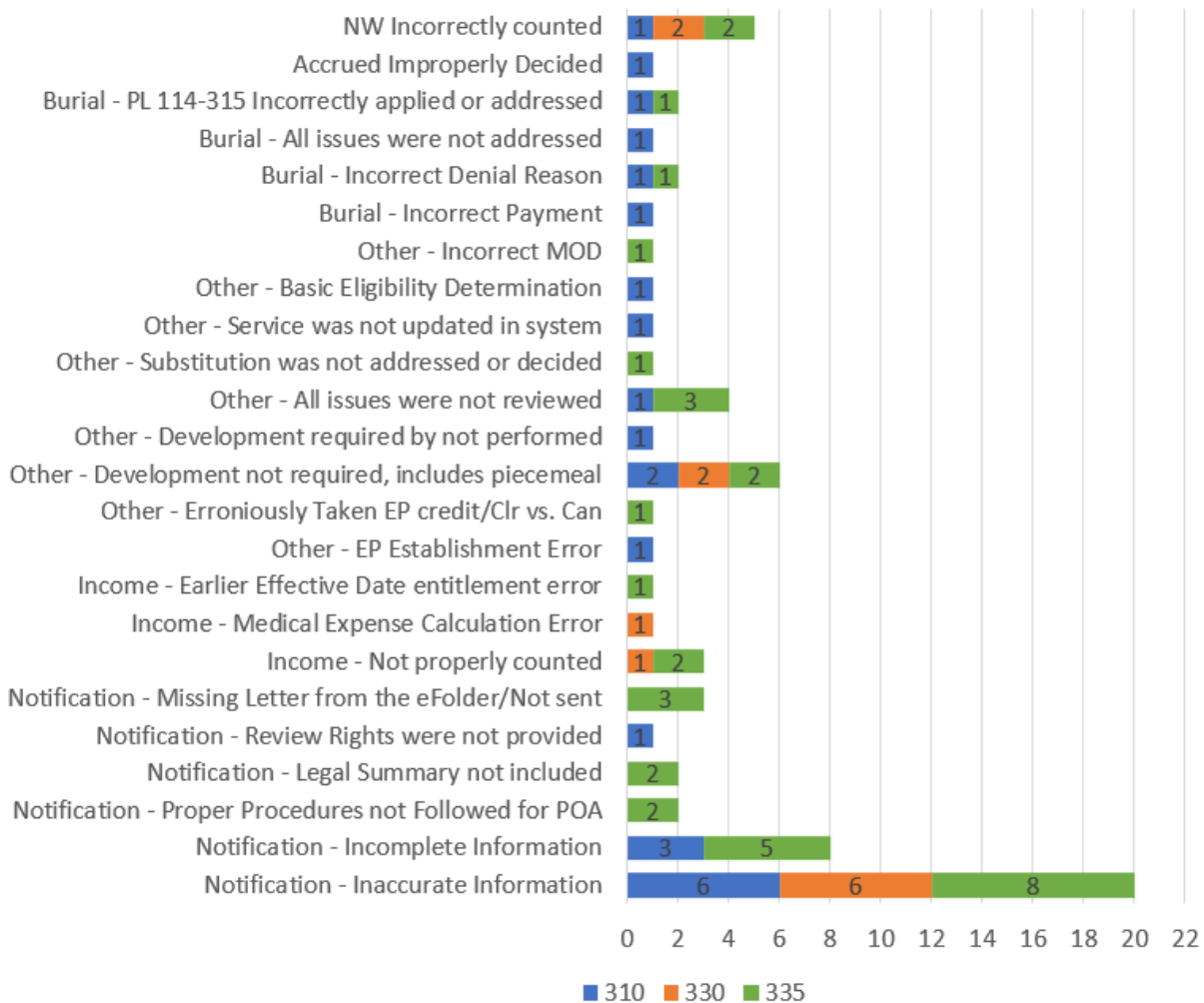The 70 errors cited were noted within the following categories:

- Notification
- Other (procedural)
- Burial
- Income
- Net Worth
- Accrued

Breakdown of Error Categories - FY22 Q3 to Current
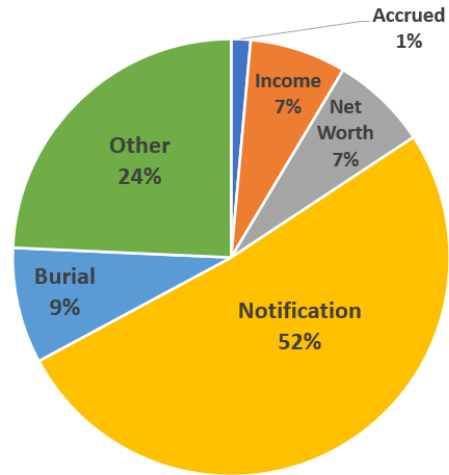
The graph below details the 70 cited errors broken out by category/reasons and station.

Error Reasons by PMC

Error Reason	310	330	335
NW Incorrectly counted	1	2	2
Accrued Improperly Decided	1		
Burial - PL 114-315 Incorrectly applied or addressed	1		1
Burial - All issues were not addressed	1		
Burial - Incorrect Denial Reason	1		1
Burial - Incorrect Payment	1		
Other - Incorrect MOD	1		
Other - Basic Eligibility Determination	1		
Other - Service was not updated in system	1		
Other - Substitution was not addressed or decided	1		
Other - All issues were not reviewed	1		3
Other - Development required by not performed	1		
Other - Development not required, includes piecemeal	2	2	2
Other - Erroniously Taken EP credit/Clr vs. Can	1		
Other - EP Establishment Error	1		
Income - Earlier Effective Date entitlement error	1		
Income - Medical Expense Calculation Error		1	
Income - Not properly counted		1	2
Notification - Missing Letter from the eFolder/Not sent			3
Notification - Review Rights were not provided	1		
Notification - Legal Summary not included			2
Notification - Proper Procedures not Followed for POA			2
Notification - Incomplete Information	3		5
Notification - Inaccurate Information	6	6	8

References/Contacts

✓ STAR Reports   https://vbaw.vba.va.gov/bl/21/star/reports/star_rpts20.htm
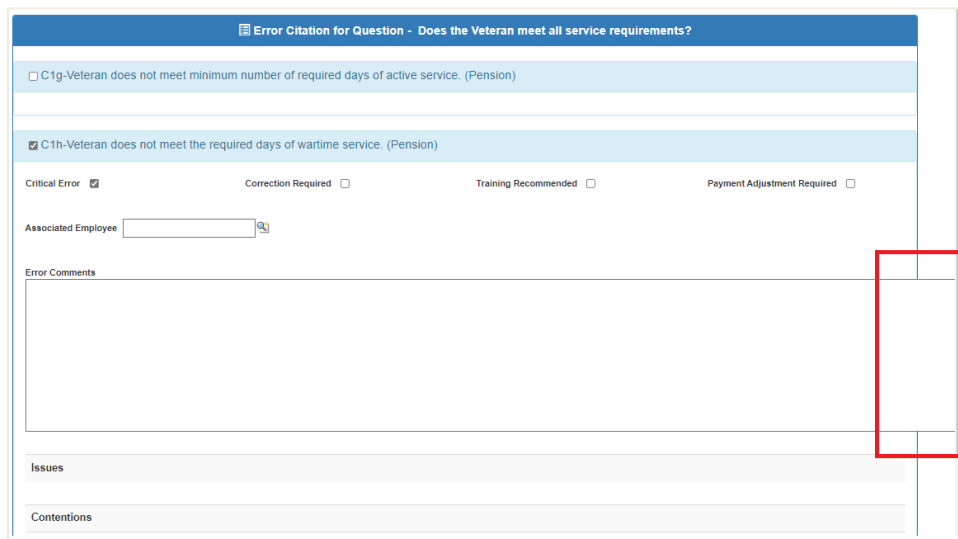

Agenda item: QMS Error Comment Workaround   **Presenter:** Michael Domzalski, Analyst

Target Audience:
QRT and Management

Discussion:

P&F Service sent an inquiry to the QMS Admins regarding a permanent fix to the Error Comments box not fitting on the screen. QMS is aware of the issue; however, a permanent solution was added to the roadmap for a future enhancement, with a date TBD due to limited resources. The PMCs must use the workaround provided, and manually adjust the error comments box. See instructions with screenshots below.

To do this, locate the handle in the bottom right of the error box (indicated by two stripes in the corner), and manually drag, or resize, the error box into view near the checklist frame.

4

There are two ways to locate the handle:

1. Scroll to the bottom of the page to find the horizontal page slider. Slide the page horizontally to the right to get the outlying box corner into view. Once the bottom right corner of the box is visible, place your cursor over the corner handle, and drag, or resize, the box near the checklist frame.
2. Reduce the zoom on the browser from 100% to bring the outlying portion of the comment box into view. Then grab the handle in the bottom right corner of the error box and drag it into view near the checklist frame.
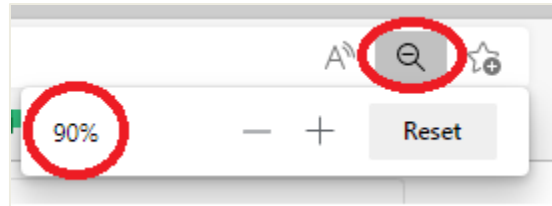
Agenda item: STAR Reconsideration Changes   **Presenter:** Alfreda Smith, Analyst

Target Audience:
QRT and Management

Discussion:

In June 2022, QMS Admins slightly updated the procedures for submitting Reconsiderations (Recons). Supplemental training and guidance were uploaded to the *QRT Coaches* chatter group in QMS. While there was no recording available, a PowerPoint was provided with step-by-step instructions: QMS Error Corrections_LOC-NAT Recons - QRT Reviewer and QRT Coach. A TMS number (VA 4626820) is available for training credit. Be sure to review the notes of each slide for details, and remember processing Error Corrections or Recons *must* be done in Salesforce Lightning view.

One of the biggest changes is that the ***Initiate Recon*** button was replaced with the ***Recon*** button to initiate a recon and/or make a recon decision.

Overview of the updated National Recon Submission process

1. An error correction is sent to the field from the National Reviewers. If applicable, the reviewer initiates a Recon at their level by hitting the ***Recon*** button and enters the facts and references that support the disagreement. Once finished/initiated, the recon remains at the station for QRT Coach to approve or reject.
2. The QRT Coach will select the initiated recon and open the Error Correction Detail page. The QRT Coach must push the ***Recon*** button to initiate the review.
3. The QRT coach, will be asked "Do you want to take ownership?" They will need to answer "Yes."
4. The QRT coach will then either "accept" or "reject" the employee's Recon request. Accepting the recon is an agreement by the reviewer and the QRT Coach that reconsideration of the error is valid.

a. If the QRT coach agrees the error should be reconsidered, they will hit "accept recon."
b. If the QRT coach disagrees that the error should not be reconsidered, they will hit "reject recon" and explain why. The error correction will then return to the original "Notified" stage and be returned to the original employee who initiated the National Recon.

5. If the initiated recon is accepted by the QRT Coach, the coach will then add/modify the argument explanation to the comment box and finish updating the record.
6. Once the Error Correction has been updated (finished), the *Error Stage* will change from *Recon-Received-Pending Review* to *National Recon Pending.*
7. The Recon will now be forwarded to the National Reviewers to decide the Recon.

We have attached a copy of the PowerPoint for your reference. If you have additional questions, please send them to the Training, Quality and Oversight mailbox.

References
✓ Salesforce/QMS   [QMS Error Corrections_LOC-NAT Recons - QRT Reviewer and QRT Coach | Salesforce](#)

Agenda item: Field Inquiries   **Presenter:** Shannon Hunsicker, Analyst

Target Audience:
QRT and Management

Discussion:

1. **Question:** Guidance was issued by Compensation Services regarding IQRs and the PACT Act. PMC would like to know if something similar will be released or confirm if this same guidance should be applied in the PMC and if PMC specific examples will be provided.

   Response: On August 10, 2022, President Biden signed the Sergeant First Class Heath Robinson Honoring Our Promise to Address Comprehensive Toxics (PACT) Act of 2022 into law, becoming PL 117-168. The law addresses health care, presumption of service-connection, research, resources, and other matters related to Veterans who were exposed to toxic substances during military service. It has been, and continues to be, a VBA wide effort to implement this law. P&F Service is collaborating with Compensation Service, and many other business lines, to put this law in effect. P&F Service is working on outreach programs, system updates and actively developing procedural guidance and training materials. For the PMCs, DIC, burial and accrued benefits will be significantly impacted by this new law. VBA will start processing claims under the PACT Act in January 2023. Currently, there are almost 29,000 claims on hold with an affixed 'PACT' and 'PACT ACT DIC Reevaluation' special issue. Implementation guidance will be issued prior to January 2023.

   Just after the PACT Act was signed into Law, on August 10, 2022, OFO released Immediate Guidance regarding handling affected claims; Compensation Service followed up with an email shortly after to the field. That guidance has now been rescinded due to the release of the **Interim Guidance** on September 9, 2022, outlining updated procedures and claim handling specifics. This Interim Guidance was developed with the collaboration of multiple business lines and included P&F Service. Please refer to the September 9, 2022, Interim

Guidance for identifying and handling PACT Act claims. Effective September 9, 2022, Quality errors should be called based on the published Interim Guidance. Per M21-4 7.10.d (Grace Period for IQRs), a 30 day grace period is counted as 30 calendar days after the relevant information is published in CPKM. Any error noted prior to the expiration of the 30-calendar day grace period, (but on or after September 9, 2022) should be recorded as a comment and will not be cited as a critical quality error. However, correction to the case will still be required.

P&F Service concurs with the August 10, 2022, guidance issued by OFO noting that errors cited between August 10, 2022 through September 8, 2022, must be for significant non-compliance with the guidance. Examples of significant non-compliance would be instances of RVSRs denying a disability that may be potentially granted under PACT Act. For VSRs, failing to include the appropriate flash would be considered significant non-compliance. The OFO guidance dated August 10, 2022, was effective on release with no grace period since that guidance was not published to the CPKM forum per M21-4 7.10.d (Grace Period for IQRs).

The Interim Guidance has been posted to CPKM on the P&F Interim Guidance page, and Compensation Services Interim Guidance page.

2. **Question:** Please discuss the feasibility of adding In Process Reviews (IPRs) into the QMS system. Incorporating IPRs into QMS would be very valuable to employees as it would allow for faster feedback and allow for closure of feedback looks.

   Response: IPRs are unique to each situation. While QMS has the capability, QMS management has determined that the staffing levels required to implement IPR are not available. Currently, no business lines are using QMS to manage IPRs. However, P&F Service will continue to work with the QMS admins to see if a viable solution is available.

Closing Comments

P&F Quality Mailbox:

We will solicit for agenda topic(s) for each future Quality Call. If you have a specific topic suggestion, please feel free to email it to the Pension and Fiduciary (P&F) Quality mailbox at PFTNGQUALOVRST.VBACO@va.gov. For specific policy and procedures related topics, please email to the Policy and Procedures mailbox at PFPOLPROC.VBACO@va.gov.

Quality Call Bulletins

Quality Call Bulletins can be found in the following locations: https://vbaw.vba.va.gov/PENSIONANDFIDUCIARY/Quality_Call_Bulletins.asp. The next Quality Call is tentatively scheduled for November 2022.

TMS Courses

All Pension and Fiduciary Quality Calls and bulletins will be available in TMS. Once the monthly bulletin is finalized, information will be sent to the PMCs and Fiduciary Hubs, which will include the TMS #.