Curriculum Guide



PMC VSR

Core Pension Training (CPT)

**Learning Aid**

January 2024

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**Overview of the Core Pension Training (CPT)**

The Core Pension Training Curriculum (CPT) is a comprehensive training program designed to provide trainees with a structured learning experience. The curriculum progresses through six separate phases to accommodate different levels of expertise. These levels center on the following:

* Basic Core Training
  + Foundational Enrichment
* Intermediate Core Training
  + Proficiency Development, and
* Advanced Core Training
  + Practical Application and Experience

**Foundational Enrichment Phase (Phases 1-4):**

During the **Foundational Enrichment** phase, the aim is to offer comprehensive material that center on core concepts, theoretical frameworks, and principles relevant to the trainees’ job functions. This segment is used to expose trainees to a wide range of concepts and practical applications for a more in-depth understanding of the content. With practical exercises and activities, trainees strengthen their competency levels and demonstrate their application of lessons learned.

Trainees are encouraged to use their analytical skills to engage with the instructors and develop decision-making skills. Emphases during this phase are placed on reinforcing foundational concepts, as well as to prepare the trainees for subsequent stages throughout their learning journey. Trainees not only gain foundational knowledge but are also afforded opportunities to expand and improve their skills. This segment equips the trainee to advance towards the **Proficiency Development** phase and establish a stronger foundation for continuous learning and growth.

**Proficiency Development Phase (Phase 5):**

During the **Proficiency Development** phase, trainees’ skills, knowledge and understanding of various topics are refined and strengthened. Throughout thisphase, the knowledge level of the trainee is heightened, as the material centers on building technical skills, problem-solving, and decision-making. This phase qualifies the trainee to advance towards the **Practical Application and Experience** phase and continue building a solid foundation for continuous learning and growth.

**Practical Application and Experience (Phase 6):**

Throughout the **Practical Application and Experience** phase, the emphasis is placed on practical application via a hands-on experience. Trainees will utilize scenarios, practice exercises, and claims to translate theoretical knowledge into practical skills. This phase provides comprehensive training on advanced topics using tools, techniques, and methodologies relevant to the topic. The goal is to transform the trainee into a subject matter expert.

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**About Knowledge Checks (Level 2 Assessments):**

**Level 2 Assessments are mandatory** and are integrated into each course as the Knowledge Check (KC). To ensure trainees’ understanding and retention of the material, each course include a KC section, which replaces the traditional lesson summary review. Level 2 Assessments are a key component of each course, replacing traditional lesson summary reviews by offering real-time feedback to further enhance the learning experience. This tool serves as a comprehensive assessment that gauges the trainees’ grasp of the content. Trainees must access the assessment portal, when prompted, to complete the KC before the lesson summary review. These assessments offer a rigorous analysis of trainees’ knowledge and practical skills. See[**M21-3 II.B.3 – CPT Training Evaluation and Assignment**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/content/554400000255488/Section-B-Pension-Management-Center-PMC-Core-Pension-Training-CPT#4), for further instructions.

Advantages of implementing Level 2 Assessments as Knowledge Checks include:

* **Improved quality** – by assessing trainees’ knowledge, the curriculum ensures each trainee acquires the skills and knowledge needed to advance to the next phase, as well as informs a higher standard of quality training.
* **Retention Assessment** – this allows instructors the ability to gauge trainees’ retention levels, and then tailor their andragogical approach to address knowledge gaps and misconceptions effectively.
* **Live Feedback** –allows the instructor to provide immediate feedback and clarifications to further assist in building trainees’ knowledge base and confidence.
* **Engagement** –affords the trainee the opportunity to become more involved with the content through assessments and improve their learning experience.

Some phases within the curriculum include a *Knowledge Check Prep (KC Prep)*, which serves as an additional tool for trainee development. The Training Manager (TM) will determine whether a trainee requires further development and utilize the *KC Prep* accordingly. The *KC Prep* targets specific areas of concern to offer additional guidance/practice. After completing the *KC Prep*, trainees should return to the Assessment Portal to reassess their retention level.

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**About the Lesson Summary Reviews**

**Instructors will use the assessments as a basis to complete the lesson summary and offer live feedback**. **See** [**M21-3 II.B.3 – CPT Training Evaluation and Assignment**](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001030/content/554400000255488/Section-B-Pension-Management-Center-PMC-Core-Pension-Training-CPT#4)**, for further instructions.**

During the lesson summary review, the instructor provides immediate feedback based on the Level 2 Assessment, which generates a thorough assessment of the trainees’ retention levels. Mainly, this interactive approach fosters engagement, as well as facilitates real-time feedback to help elevate the overall quality of the new hires’ learning experience.

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***Analysis of Effectiveness:***

Integrating Level 2 Assessments into the curriculum offers a variety of benefits as it results in a more accurate measurement of trainees’ knowledge and understanding of the material. Moreover, the live feedback provided during the lesson summary review addresses any gaps or misconceptions immediately to ensure trainees absorb the content more effectively.

Additionally, this interactive approach to assessments supports the engagement level of trainees via active participation throughout the evaluation process and foments personalized feedback. This approach also enables instructors opportunities to identify areas for improvement and adapt their andragogy to meet the need. By leveraging Level 2 Assessments, the curriculum fosters a proactive and effective learning environment, benefiting both trainees and instructors.

**About Surveys – Level 1 Assessments**

As the course designers strive for continuous improvement, shared insights via Level 1 Assessments ensure the tailoring of material to address the needs of trainees. Suggestions and critiques offered by trainees will assist the designers in identifying areas that may require additional enhancements, necessary updates, and/or a fresh perspective on steps to take in conveying complex concepts.

Therefore, at the conclusion of each training course is a Level 1 Assessment that not only serves as an essential step in earning credit, but also allows each trainee to offer feedback. Importantly, trainees can assess their learning experience, identify the strengths of each course, as well as highlight areas of improvement requiring additional clarification or support.

**About the Introductory Courses**

Certain topics are inherently complex and require a higher level of knowledge; therefore, many introductory courses are positioned within the intermediate phase, as trainees should have already acquired foundational understanding of how to review various types of pension claims during the **Foundational Enrichment** phase.

Unlike the conventional approach of offering introductory courses as prerequisites, the CPT’s strategic inclusion of these courses within the intermediate and advanced phases serves as a benefit as this method addresses potential knowledge gaps regarding more challenging topics and accommodates learning diversity. By positioning introductory courses within the intermediate and advanced phases, trainers can leverage trainees’ foundational understanding, to further enhance their ability to grasp the complexities of various topics. For instance, the Foundational Enrichment phase prepares trainees for more specialized training within the intermediate phase, which informs their ability to handle diverse claims competently.

Introducing complex topics during the intermediate phase acts as a transitional link between generalized and specialized training. As trainees advance in their understanding, they frame their foundational knowledge in a way in which they can appreciate its direct application to their specific roles and responsibilities. This contextualization cultivates a deeper connection to the material to further support retention and practical application. This concept stems from a carefully crafted learning progression model that affords trainees opportunities to develop their knowledge and skills when handling various claims.

**A Comprehensive Overview of the Training Hours**

**The training schedule can be found in the Appendix section of the** [**Curriculum Guide**](https://epss.vba.va.gov/vsr_assistant/pmc_vsr/pdfs/ja_PMCCPTCurriculumGuide.pdf#zoom=100)**.**

Each phase serves a specific purpose, fostering progressive development and preparing trainees to excel in their job functions. Importantly, hours spent in this training program is to secure knowledge acquisition, applied learning, and team collaboration. As such, the learning hours and significance is outlined as follows:

**Basic Core Phase: Introductory Courses (Phases 1-4)**: By the end of this segment trainees should have accumulated a total of **28 training hours**. The underpinnings of the ***Basic Core (Foundational Enrichment)*** phase are rooted in establishing a solid understanding of fundamental concepts and skills.

**Intermediate Core Course Phase (Phases 5.1a-5.6)**:The **Intermediate Core Course (Proficiency Development)** phase contains approximately **96 training hours**. This phase expands the trainees’ skill levels by introducing them to more complex subject matters and advanced techniques.

**Advanced Core Course Phase (Phase 6)**: The final phase is the **Advanced Core Course (Practical Application and Experience)** phase, which is projected to encompass **100 training hours**. During this segment, trainees become more proficient via on-the-job training, to further support learning and facilitate immediate application of newly acquired skills.

Completion of the projected training time for each phase suggests trainees have met the expected learning outcomes and achieved the desired level of competency. This comprehensive training sets the foundation for long-term success and ongoing continuous growth and professional development.

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**Comprehensive Knowledge Sessions (CKSs)**

The **Comprehensive Knowledge Session (CKS)** is a two-day recap session that extends beyond the existing structure of reviews and assessments, to offer a comprehensive review that will allow trainees opportunities to revisit various course material covered; and confirm their understanding of the subject matter. The CKS permits the submission of accumulated questions, concerns, as well as present areas of confusion for additional clarification and feedback before moving forward.

These sessions are held at the end of Phase 6, to reinforce key concepts, methodologies, and skills learned throughout the program, while also encouraging trainees to synthesize their knowledge and draw connections between the topics covered.

**Note**: Instructors may also use this time to assign KC Prep courses to address those topics that proved more complex for trainees, and then invite the trainee to revisit the Assessment Portal to reevaluate their knowledge base. **Training Managers (TMs)/Instructors are advised to create additional training exercises for any challenging topics based on error trend analysis reports pertaining to their local needs. Use this time to assign KC Prep courses to guide further review and discussions.**

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**About the Images and References**

**Images**: For courses with images, the visuals used throughout the presentation, lesson plan, and trainee’s guide, are consolidated in the Appendix. Instructors and trainees are encouraged to refer to the Appendix, located at the end of the lesson, to access images for improved visual support during training.

**References**: In consideration of the number of references used and to allow for a comprehensive and expanded list of resources, manual references are noted within the lesson plan and trainee guide as opposed to the presentation. Not only does this allow for a clear and concise presentation, but it also cultivates self-directed learning in which the trainees move beyond the presented material to explore sources that assist with developing their knowledge base. Mainly, this approach permits a decluttered presentation while the core content is highlighted, and active engagement is encouraged.

To conclude, the curriculum begins with basic training, advances to intermediate, and then culminates in advanced-level training. This methodization allows trainees opportunities to develop their knowledge and skills in a logical and progressive manner, as each segment builds upon the knowledge acquired in the previous phase to ensure the gradual and systematic development of trainees’ expertise.

The **Curriculum Guide** plays a crucial role in guiding trainees through the curriculum by providing a list of courses within the Talent Management System (TMS), inclusion of Identification (ID) Numbers, the number of training hours for each course, and the total number of training hours for each phase. Below is a breakdown of topics organized by phase, along with the corresponding learning hours.

**NOTE: TOTAL LEARNING HOURS FOR EACH SEGMENT IS ROUNDED TO THE NEAREST HOUR (e.g., 2.5 training hours is rounded to 3 hours).**

|  |  |  |
| --- | --- | --- |
| **Phase 1: Basic Core Training** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Annual Government Ethics | **3812493** | **1** |
| Harassment Prevention & Accountability Training | **45224** | **1** |
| Privacy and Information Security Awareness and Rules of Behavior | **10176** | **1** |
| VA Core Values (ICARE Refresher) | **3901227** | **1** |
| Privacy and HIPAA | **10203** | **1** |
| VBA Continuity of Operations Awareness | **1372648** | **1** |
| Records Management for All VBA Employees | **3948000** | **.5** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **7** |
| **Phase 2: Basic Core- PMC VSR Orientation** | | |
| **Title** | **TMS Number** | **Training Hours** |
| VSR Orientation: Overview of the Curriculum Guide | **4654618\_**orient | **2** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **2** |
| **Phase 3: Basic Core - PMC VSR Resources** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| VA Terminology | **4545320**\_term | **1** |
| VBA Intranet Resources for the PMC VSR | **4189330**\_penweb | **1** |
| Overview of Pension Systems and Applications | **4189336**\_systems | **2** |
| Phase 3: PMC VSR Resources KC Preparation | **4408379**\_kcprep | **2** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **6** |

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| **Phase 4: Basic Core – Foundational Enrichment** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Stages of a Pension Claim | **4551444**\_stages | **1** |
| Types of Pension Claims and Claims Recognition | **4189342**\_types | **2** |
| Pension Claims eFolder/Records Management | **4189344**\_records | **2** |
| Initial Screening Policies for Applications | **4189348**\_formal | **1** |
| Date of Claim (DOC) | **4189354**\_date | **1** |
| End Product (EP) Codes | **4189359**\_ep | **2** |
| Establish Veteran Status | **4189364**\_vetstat | **2** |
| Establish a Claim | **4189361**\_cest | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **12** |
| **Phase 5: Intermediate Core – Proficiency Development** | | |
| **Phase 5 Part 1(a): Types of Claims** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Types of Claims and Priority Processing | **4189352**\_priority | **2** |
| VA Representation and Third-Party Authorization | **4189357**\_poa | **1** |
| Introduction to Old Law and Section 306 Programs | **4189360**\_oldlaw | **.5** |
| Fully Developed Claims (FDCs) | **4189349**\_fdc | **2** |
| Introduction to NOD\_FNOD\_MOD Claims | **4641156\_**nod | **3** |
| Introduction to Initial vs Supplemental Claims | **4652079 \_**initial | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **10** |

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| **Phase 5 Part 1(b): Basic Eligibility** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Determine Dependency Eligibility: Spouse | **4189367**\_spouse | **2** |
| Determine Dependency Eligibility: Child | **4189368**\_child | **3** |
| Establish Parental Relationship for DIC | **4408422**\_parent | **2** |
| Presumptive Criteria for Permanent and Total (P&T) Disability | **4189366**\_presum | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **10** |
| **Phase 5, Part 1(c): Income Eligibility** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Establish Periods for Calculating Income | **4408425**\_incperiods | **2** |
| Determine Types of Income | **4408431**\_inctypes | **3** |
| Select Qualifying Expenses | **4408432**\_expense | **2** |
| Determine Income Status | **4408434**\_incstatus | **4** |
| Determine Net Worth Status | **4408435**\_networth | **3** |
| Phase 5.1(c) Income Eligibility KC Preparation | **4408437**\_kcprep | **2** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **16** |

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| **Phase 5, Part 1(d): Beyond Basic Eligibility** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Verify Proof of Death of Veteran for Survivor’s Benefits | **4408438**\_death | **1** |
| Apply Liberalizing Law to Pension Eligibility | **4408444**\_liblaw | **1** |
| Process Vet Married to Vet Cases | **4408446**\_vettovet | **1** |
| Determine Eligibility for Month of Death (MOD) Eligibility | **4408454**\_mod | **1** |
| Overview of Ready to Rate | **4408456**\_ready | **1** |
| Determine Accrued Benefits Eligibility | **4408449**\_accrued | **2** |
| Determine Substitution Eligibility | **4646322**\_substitution | **2** |
| Determine Burial Benefits Eligibility | **4408455**\_burial | **3** |
| Determine Eligibility for DIC and Parents’ DIC | **4408457**\_DIC | **3** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **14** |

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| **Phase 5, Part 2: Process a Claim** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Overview of the Development Process | **4408466**\_dev | **3** |
| Request Appointment of Fiduciary for Incompetency Claims | **4408469**\_fid | **2** |
| Introduction to the Matching Program | **4649168\_**matching | **1** |
| Process a Claim KC Preparation | **4408470**\_kcprep | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **6** |
| ***Phase 5, Part 3: Promulgation*** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Confirm Accuracy of a Rating Decision | **4408481**\_rate | **1** |
| Overview of the Award Process | **4408480**\_award | **2** |
| Overview of Election Claims | **4652531\_**elections | **1** |
| Introduction to Processing a Request for Renouncement of Benefits | **4649119\_**renouncement | **1** |
| Introduction to 800 Series Work Items | **4649125\_**800series | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **6** |
| ***Phase 5, Part 4: Prepare Decision Notice*** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Prepare the Decision Notice | **4408484**\_decnotify | **3** |
| Overview of the Administrative Decision | **4189363**\_admindec | **2** |
| Apply/Issue Due Process Provisions | **4408493**\_duepr | **2** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **7** |

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| ***Phase 5, Part 5: Award Adjustments*** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Determine Qualifying Expense Adjustments | **4408485**\_expadj | **4** |
| Determine Amended Income Adjustments | **4408487**\_incadj | **4** |
| Determine Dependency Adjustments | **4408490**\_depadj | **1** |
| Intro to Overpayments and Waiver Withholdings | **4408497**\_opymnt | **2** |
| Introduction to Post Award Audit (PAA) Adjustment | **4649930\_**paa | **1** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **12** |
| ***Phase 5, Part 6: Award Adjustments Extension*** | | |
| **Title** | **TMS Numbers** | **Training Hours** |
| Introduction to Contested Claims | **4649153\_**contested | **3** |
| Introduction to Special Monthly Pension (SMP), Aid & Attendance (A&A), and Housebound (HB) Claims | **4650014\_**SMP | **2** |
| Introduction to Incarceration Adjustments | **4649124\_**incarce | **4** |
| Introduction to Fugitive Felon Adjustments | **4649160\_**fugitive | **3** |
| Introduction to Apportionment Claims | **4649658 \_**apport | **3** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **15** |

| **Phase 6: Advanced Core: Practical Application and Experience** | | |
| --- | --- | --- |
| **Course Name** | **TMS Numbers** | **Training Hours** |
| Process Original Veterans Pension Claims | **4408386**\_vetpen | **5** |
| Process Burial Claims | **4408387**\_burial | **6** |
| Process Burial Claims KC | **4309844**\_KC | **1** |
| Process Month of Death (MOD) Claims | **4408388**\_mod | **4** |
| Process Month of Death Claims KC | **4215715**\_KC | **1** |
| Process Original Survivors Pension Claims | **4408393**\_surviv | **4** |
| Process Special Monthly Pension (SMP) Claims (Aid & Attendance/Housebound) | **4408389**\_smp | **4** |
| Process a Request for Renouncement of Benefits | **4408420**\_renounc | **2** |
| Process DIC Claims | **4408391**\_dic | **6** |
| Process Parents’ DIC Claims | **4408394**\_pdic | **3** |
| Process Election Claims | **4408417**\_elect | **3** |
| Process Accrued Claims | **4408395**\_accr | **5** |
| Process Accrued Claims KC | **4271830**\_KC | **1** |
| Process Income and Net Worth Adjustment Claims | **4408406**\_incnetadj | **4** |
| Process a Post Award Audit (PAA) Adjustment | **4408416**\_paa | **2** |
| Process Dependency Adjustment Claims | **4408411** \_depadj | **5** |
| Process Expense Adjustment Claims | **4408407**\_expadj | **4** |
| Process Medicaid-Approved Nursing Facility Adjustments | **4408419**\_medicaidadj | **4** |
| Process Apportionment Claims | **4408408\_**apportion | **4.5** |
| Process Incarceration and Fugitive Felon Adjustments | **4408414\_**incaradj | **6** |
| Process VAMC Facility Adjustments | **4408418**\_vamcadj | **7** |
| Process Cases with Multiple Issues | **4408421**\_multiple | **4** |
| Process Initial vs Supplemental Claims | **4627550**\_initalsup | **6** |
| \*Introduction to PACT Act-Related Clams | **4643229**\_pactact | **3** |
| \*Overview of 38 U.S.C. 1151 DIC Claims | **4649843 \_**1151 | **2** |
| \*Overview of Ancillary Benefits | **4649127\_**ancillary | **3** |
| **TOTAL NUMBER OF TRAINING HOURS** |  | **100** |

***\*Note****: Although considered introductory courses, due to the complexity of the topic and the amount of expertise required, some introductory courses are covered at the end of Phase 6.*

**Appendix**

**Course Schedule**















