

 VAU.S. Department  
of Veterans Affairs

# Pension and Fiduciary Service (P&F)

## Pension Quality Call

Date: March 26, 2024

TMS: # VA 4657112

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### *AGENDA TOPICS*

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[ITEM 1: STAR ERROR TRENDS](#)[ITEM 2: PACT ACT UPDATES](#)[ITEM 3: POTENTIAL FRAUD AGAINST A VA CLAIMANT](#)[ITEM 4: GRACE PERIOD FOR NOTIFICATION LETTERS](#)[ITEM 5: FIELD INQUIRIES](#)[CLOSING, QUESTIONS, NEXT QUALITY CALL](#)

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### *AGENDA ITEMS*

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**Agenda item:** STAR Error Trends

**Target Audience:**

QRT and Management

**Discussion:**

Beginning with the February 2024 reviews, the STAR sample size increased from 38 to 47 reviews per month. Samples are calculated based on an average performance from the past 2 years.

A trend analysis was conducted regarding errors cited on National STAR Pension Quality Reviews completed for the months of **January 2024 and February 2024** (transactions completed between December 1, 2023, through January 30, 2024). STAR reviews are performed the month after a claim is completed.

Review Month	Review Category	Total Reviewed	Total # of Errors	# Claims in Error	BE Errors	Recons Submitted	BE Accuracy %
Jan	Authorization	14	9	6	4	0	83.33%
	Rating	24	15	7	2	1	79.17%
	<b>Total</b>	<b>38</b>	<b>24</b>	<b>13</b>	<b>6</b>	<b>1</b>	
Feb	Authorization	25	5	3	0	2	100%
	Rating	22	13	9	2	2	90.91%
	<b>Total</b>	<b>47</b>	<b>18</b>	<b>12</b>	<b>2</b>	<b>4</b>	

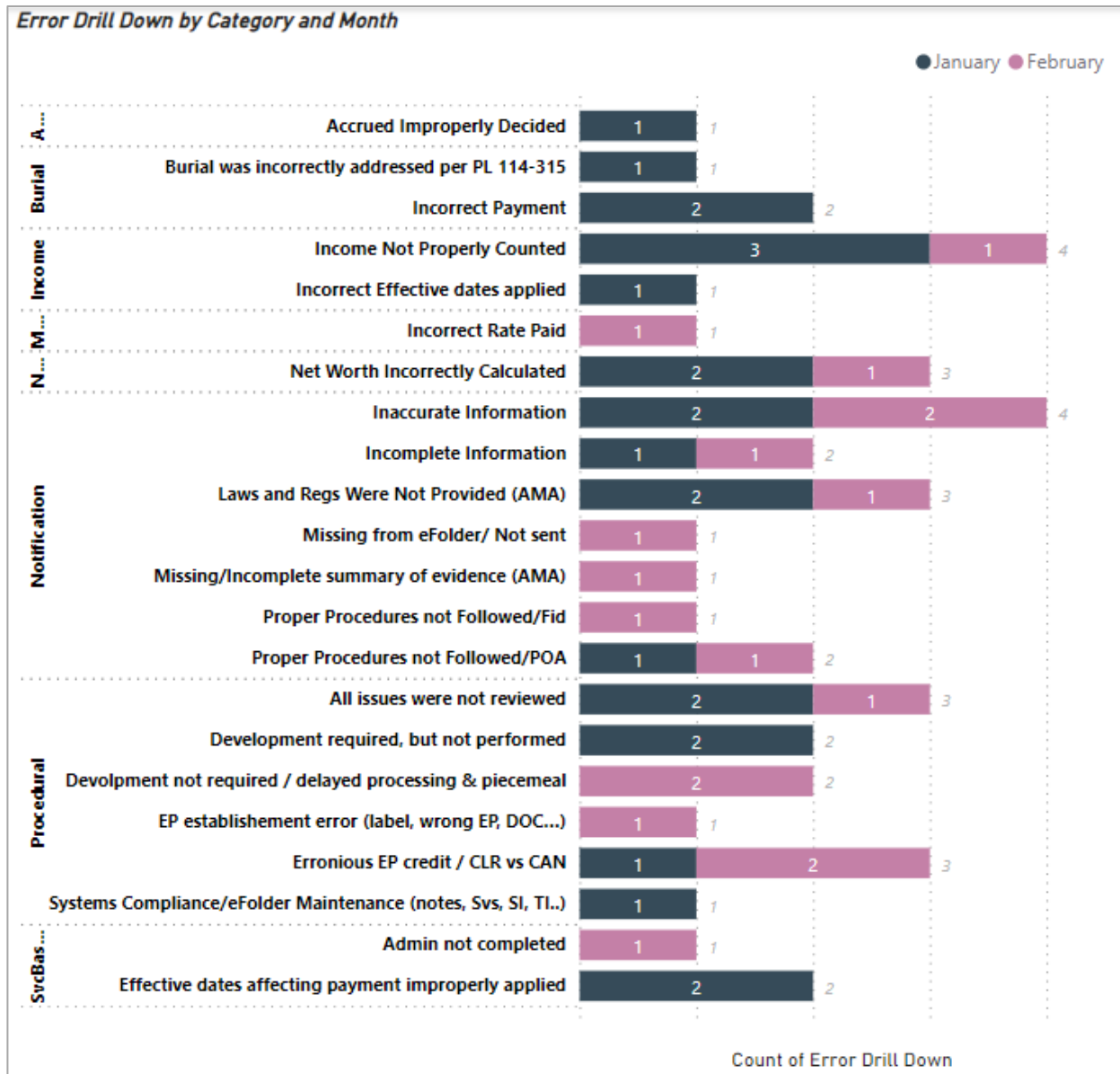
Out of a total of **85** claims reviewed for quality, **25** claims had **42** errors cited; **8** of those claims had BE errors.

**5** reconsiderations (recons) were submitted. 2 were upheld, 2 non-BE error was overturned, and 1 is still pending.

The **42** cited errors were within the following categories:

January Reviews		February Reviews	
BE	Non-BE	BE	Non-BE
1 Accrued 3 Burial 1 Income 1 Basic Eligibility	3 Income 2 Net Worth 6 Notification 6 Procedural 1 Basic Eligibility	1 MOD 1 Basic Eligibility	1 Income 1 Net Worth 8 Notification 6 Procedural

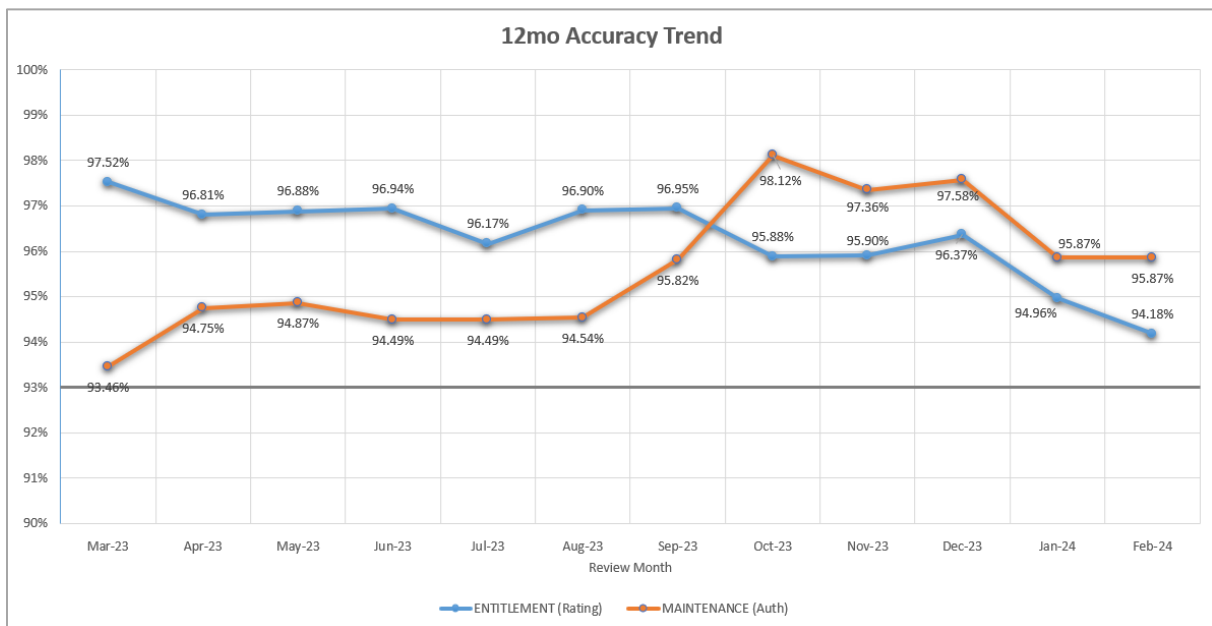
The *Error Drill Down* graph below details the errors broken out by category/reasons:



Notification continues to be the highest area of errors. Please continue to include all appropriate attachments and review all letters for accuracy before releasing. These reviews also showed a dramatic increase in procedural inaccuracies. Please remind VSRs to be aware of POA and Fiduciary Hub notification procedures, proper disposition of the correct EP, and procedures for when it is acceptable to clear and cancel EPs. These reviews also saw many burial processing errors. Please remind claims processors to review burial rules, procedures, and acceptable transportation expenses.

Although both rating and accuracy are still at the Outstanding level (above 94%), please be aware that accuracy on Rating EPs are on an overall decline.

Authorization quality has dropped since the beginning of this FY, but overall BE errors are minimal.



## References/Contacts

- ✓ STAR Reports [https://vbaw.vba.va.gov/bl/21/star/reports/star\\_rpts20.htm](https://vbaw.vba.va.gov/bl/21/star/reports/star_rpts20.htm)
- ✓ Pension STAR Dashboard | Salesforce [Pension STAR Dashboard | Salesforce](#)

**Agenda item:** PACT Act Updates

**Target Audience:**  
QRT and Management

## Discussion:

### Recent Key-Releases and events:

- September 8, 2023 – SOP v4 released. Latest updates. (Reminder)

### (Reminder) PACT SI:

- **PACT SC Death** SI is still a placeholder and must **not** be used to indicate a PACT claim in VBMS Core. Please use **PACT** or **PACT ACT DIC Reevaluation** on DIC contentions to indicate a PACT claim.

### PACT Special Focus Review (SFR):

The follow up SFR is still in progress. P&F is reviewing cases completed between October 9, 2023 through December 31, 2023. The anticipated completion date is May 2024.

Questions regarding training courses should be directed to the Pension & Fiduciary Service Training Team, Policy questions should be directed to the Policy and Procedures team, case specific questions should be directed to Quality and Oversight via the [Field Inquiry Tool](#) (FIT).

## References/Contacts

- ✓ PMC Intranet Site [PACT Act - Pension and Fiduciary Service \(va.gov\)](#)

## References/Contacts

✓ Questions [Field Inquiry Tool](#) (FIT).

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### Agenda item: Potential Fraud Against a VA Claimant

#### Target Audience:

QRT and Management

#### Discussion:

This serves as a general reminder that when a claims processor notes the possible existence of fraud against a claimant, notify the claimant that they can file a complaint with the Federal Trade Commission using the language found in M21-1, Part X, Subpart iv, 3.A.4.a.

Also, in cases where a claims processor receives a specific complaint alleging a claimant was financially exploited (pension poaching), refer the complaint to Pension and Fiduciary Service, Quality and Oversight Team, at VAVBAWAS/CO/P&F TNG QUAL OVRST.

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### Agenda item: Grace Period for Notification Letters

#### Target Audience:

QRT and Management

#### Discussion:

On January 24, 2024, P&F provided new language for inclusion in Veteran's Pension grant and denial letters to inform low-income Veterans of available healthcare benefits, to include mental health and crisis assistance. Effective January 25, 2024, Notification errors will be cited for not including the language provided. A grace period is granted from January 25, 2024 through March 31, 2024. Any error cited prior to the expiration of the grace period will be recorded as a comment and will not be a critical quality error. However, a case correction will still be required.

The Extended Grace Period Quality Management System (QMS) Guidance at the end of this document provides information to assist with the reconsideration process associated with a covered grace period.

## References/Contacts

Field Notification                      New language for Veterans Pension Grant or Denial Letters, January 24, 2024 and January 26, 2024

Questions [Field Inquiry Tool](#) (FIT).

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### Agenda item: Field Inquiries

#### Target Audience:

QRT and Management

#### Discussion:

## **St. Paul PMC:**

**Question:** Potential administrative errors are no longer controlled under an EP 960 but instead are controlled under an EP 600 (M21-1 VI.i.2.B.3.g). M21-1 III.i.2.F.2.a states to enter issues as contentions when they are:

- Expressly claimed by the claimant/Veteran/authorized representative and/or
- Put at issue and require development.

We generally apply a contention for the potential administrative error on the EP 600 based on the above manual reference as the potential administrative error is being put at issue. We request clarification as to whether it would be a quality error if the issue was not properly addressed at adjudication.

**P&F Response:** At this time, P&F is working with OFO to address tracking issues associated with administrative decisions. Once a decision is made, P&F will update the manual accordingly and notify the field. Therefore, since M21-1 III.i.2.F.2.d does not indicate that an administrative error contention is specifically applicable, a systems error would not be called if there is, or is not, a contention for an administrative decision on the EP 600. However, it would be an error if the claims processor did not address the administrative error as part of their complete actions taken on the claim as indicated in M21-1 VI.i.1.A.2.c, III.i.2.F.5.a (note), VI.i.2.B.3.g and VI.i.1.A.2.c

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## *Closing Comments*

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### **P&F Quality Call Topics:**

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](mailto:PFTNGQUALOVRST.VBACO@va.gov). For specific policy and procedures related topics, please send inquiries through the [P&F Service Field Inquiry Tool \(FIT\)](#).

### **Quality Call Bulletins**

Quality Call Bulletins can be found within TMS along with call recordings. Once the monthly bulletin is finalized, information will be sent to the PMCs and Fiduciary Hubs which will include the TMS #.

The next Quality Call is tentatively scheduled for May 2024.

## Extended Grace Period Quality Management System Guidance

If...	Then...
<p>the error correction record is still open</p>	<p>the employee should submit a reconsideration.</p> <p><b>Important:</b> QRS are to accept these submissions even if not submitted within 5 business days from notification of the error. Additionally, coaches are not required to enter a coach's note to account for the late submission.</p>
<p>the employee has previously marked the error correction record as both 'accepted' and 'corrected'</p> <p>AND</p> <p>No reconsideration decision was previously initiated OR only the first level reconsideration was requested</p>	<ol style="list-style-type: none"> <li>1. the home RO will reopen the error correction record by selecting the "Reset" button and indicating the 'accepted' and "corrected' fields should be reset.</li> <li>2. the employee should submit a reconsideration request and specifically state that the newly extended grace period as the basis for the reconsideration request.</li> </ol> <p><b>Important:</b> QRS are to accept these submissions even if not submitted within 5 business days from notification of the error. Additionally, coaches are not required to enter a coach's note to account for the late submission.</p>
<p>the employee has already previously submitted two (2) reconsiderations</p>	<ol style="list-style-type: none"> <li>1. the home RO will reopen the error correction record by selecting the "Reset" button and indicating the 'accepted' and "corrected' fields should be reset.</li> <li>2. The home RO coach will contact the QRT coach at the station the second reconsideration decision was completed.</li> </ol>

	<p>3. A QRS at the second reconsideration station has access to reset the reconsideration decision and change any previously upheld errors to a mitigation.</p> <p>When resetting the reconsideration decision, the QRS should enter a note stating that it is being reset due to the extended grace period.</p> <p>4. Upon completion of the new reconsideration decision, the coach from the reconsideration station must provide notice to the home station QRT coach that a new reconsideration decision has been issued. <i>QMS does not send out automatic notification when a reconsideration decision has only been reset.</i></p> <p><b>Important:</b> Stations are not able to reset a reconsideration decision that was not made by their station. Only the station that issued the most recent reconsideration decision is able to reset a reconsideration decision.</p>
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**Reminder:** QRS must review the entirety of the originally cited error to ensure that there are not any un-related errors included with the original citation. If there are errors not subject to the extended grace period, the original reconsideration decision should remain unchanged. Errors that are only related to processing deficiencies noted by the extension are subject to mitigation.

Once a new reconsideration decision has been issued, employees are responsible for ensuring that all corrective actions have been taken. Employees will also have to, once again, mark the error as both 'accepted' and 'corrected' to fully close out the error correction record.