



Pension and Fiduciary Service (P&F)

Pension Quality Call

Date: July 26, 2024
TMS: # VA 4662418

AGENDA TOPICS

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AGENDA ITEMS

Agenda item: STAR Error Trends

Presenter: Christine Hohnholt, Analyst

Target Audience: QRT and Management

Discussion:

A trend analysis was conducted of errors cited on the National STAR Pension Quality Reviews completed between the months of **May 2024 and June 2024** (transactions completed between April 1, 2024, through May 31, 2024).

Review Month	Review Category	Total Reviewed	Total # of Errors	# Claims in Error	BE Errors	Recons Submitted	BE Accuracy %
May	Authorization	25	4	4	0	0	100.00%
	Rating	22	6	6	0	1	100.00%
	Total	47	10	10	0	1	
Jun	Authorization	25	8	6	3	1	88.00%
	Rating	22	2	2	2	0	90.91%
	Total	47	10	8	5	1	

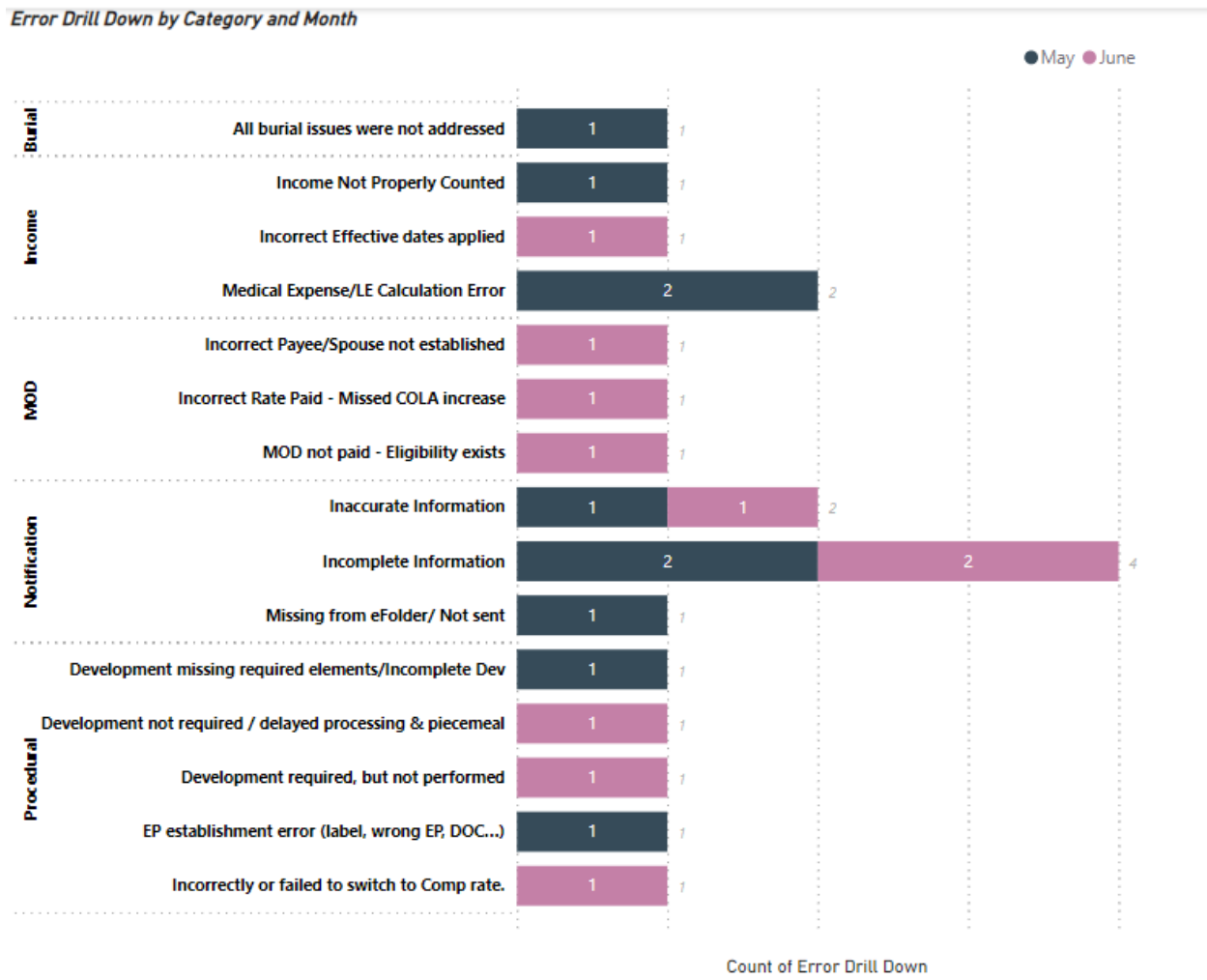
Out of a total of **94** claims reviewed for quality, **18** claims had a total of **20** errors cited; **5** of those claims had BE errors.

2 reconsiderations (recons) were submitted. Neither recon was on a BE error.

The 20 cited errors were within the following categories:

May Reviews		June Reviews	
BE	Non-BE	BE	Non-BE
	1 Burial 3 Income 4 Notification 2 Procedural	1 Income 3 MOD 1 Procedural	3 Notification 2 Procedural

The *Error Drill Down* graph below shows a breakdown of the error categories:



Inaccurate and incomplete notification letters continue to be the highest area of errors. Please continue to include all appropriate attachments and be sure to proofread for accuracy before releasing. Procedural errors and income counting/medical expense errors continue to be the next highest categories. However, the majority (60%) of the BE errors cited during this time were associated with the month-of-death benefit.

Please remind VSRs to review claims for ALL issues, perform complete development actions applicable simultaneously to avoid avoidable claim delays, and check the claim is being processed under the correct EP(s).

It is important to remind claims processors to review their claims for issues that would cause BE errors, such as basic eligibility issues, income and medical calculations, income counting rules, effective dates, service eligibility and all claimed issues (like reviewing for A&A and incompetency). BE errors are rising and increased BE errors in following months may cause accuracy to fall below national goals.

References/Contacts

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

Agenda item: PACT Act Updates

Presenter: Shannon Hunsicker, Analyst

Target Audience: QRT and Management

Discussion:

Recent Key-Releases and Events:

- May 1, 2024 –consolidated and updated FAQ document is posted on the P&F PACT Intranet site (Reminder).
- June 13, 2024 - OFO provided updated guidance regarding PL 20-2024-06.
- June 20, 2024 - **PACT SC Death** Rating Special Issue (SI) training provided.
- July 17, 2024 – SOP v5 released.

PL 20-2024-06

On June 13, 2024, OFO provided information about PL 20-2024-06 published in the federal register on June 17, 2024. This policy letter is an updated version of VBA Letter 20-22-10, the sub-regulatory guidance on processing claims involving the PACT Act. Compensation service has indicated that the SOP, Job Aids and other subsequent guidance and materials will be updated accordingly. Highlights include:

- ✓ Clarifying ILER guidance.
- ✓ Two new exceptions under 38 USC § 1168(b).
- ✓ Clarification on male breast cancer, urethral cancer and paraurethral cancers included in the list of presumptive conditions associated with exposure to BPOTs.
- ✓ Male breast cancer added as a disease that has no indication of an association with herbicide exposure and included on the list of conditions not warranting a medical examination and opinion under 38 U.S.C. § 1168 when the only participation in a TERA is related to herbicide exposure.
- ✓ Renal cancer (kidney and renal cancer) has been removed from the existing § 1168(b) exception.
- ✓ [38 C.F.R. § 3.309\(d\)\(3\)\(ii\)](#) updated to include the expanded list of locations eligible for presumption of radiation exposure.
- ✓ Correcting end date of qualifying covered service in Thailand for purposes of entitlement to spina bifida benefits.

- ✓ Removal of “Lymphomatic cancer of any type” from the list of presumptive cancers under 38 U.S.C. § 1120(b)(2) due to a law change under the National Defense Authorization Act (NDAA) for Fiscal Year 2023.

New Rating Special Issue (SI): “PACT SC Death”

Previous quality calls introduced the *PACT SC Death* Rating SI as a placeholder in VBMS Core. On June 20, 2024, P&F released guidance that the new rating SI is now available in VBMS-R for use on ratings for PACT SC death grants that are due to a PACT condition, an expanded PACT location, or reevaluation.

When completing a PACT related, service-connected death grant, that is due to a PACT condition or an expanded PACT location, RVSRs are required to add the *PACT SC Death* rating SI in VBMS-R before completing the rating. This identifier will be reflected on the rating code sheet and is needed for tracking DIC PACT grants and assist with DIC automation. It will also aid claims processors in identifying PACT DIC grants on original, and reevaluation claims so the correct effective dates can be applied.

This new SI is not meant to replace other SIs; rather, this is in addition to other SIs required on the claim/rating. The existing requirement to add the *PACT* or *PACT Act DIC Reevaluation* special issues to the DIC contention in VBMS Core still applies, along with TERA SIs and other SIs when applicable. Use of the new rating SI is effective immediately.

P&F provided training to the field on June 20, 2024, and will allow a 30-calendar day quality grace period on associated procedural errors through July 20, 2024. Errors cited during this grace period will be noted as comments but will still require corrective action.

PACT SOP v.5

Compensation service, in collaboration P&F and other business lines, released the latest version of the PACT SOP on July 17, 2024. Highlights include:

- Clarifications of the definition of TERA under Topic 2.
- Updated TERA claim overview and attribute guidance.
- Updated TERA exceptions guidance.
- Added TERA exceptions to the factors to consider when deciding TERA claims.
- Updates to the section *Herbicide Exposure Development Procedures* in Topic 3.2 involving potential Nehmer applicability.
- New note regarding supplemental claims and elections for reevaluation of a previously denied claim under the section *Processing DIC Claims for Reevaluation of a Previously Denied DIC Claim Related to the PACT Act* in Topic 6.
- Removal of the section *Processing Supplemental Claims Requesting Reevaluation of a Previously Denied DIC Claim* under Topic 6 as outdated and now duplicative of the information stated in the new note in the previous bullet.
- Added guidance relevant to applying the new PACT SC Death SI on rating claims.

Please direct all PACT related questions to the FIT tool and select the PACT header.

References/Contacts

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

Agenda item: PACT Act Deferrals

Presenter: Mike Domzalski,
Analyst

Target Audience: QRT and Management

Discussion:

During the in-person site visit of the Philadelphia PMC on April 23-24, 2024, the issue of deferrals was raised. When generating a deferral, it is crucial to reference the specific section and page number of the PACT SOP. The VBMS deferral functionality is required for any situation in which a claim returns to a previous step in the process, and all relevant details must be provided to include:

- a manual reference
- most appropriate reason(s) for deferral, and
- relevant eFolder document bookmarks

References/Contacts

- ✓ [M21-4, 6.8.e., VBMS Deferrals](#)

Agenda item: Potential Fraud Against VA Claimants
Reminder

Presenter: Shannon Hunsicker,
Analyst

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.

Agenda item: SSA Debt Memo Reminder

Presenter: Shannon Hunsicker,
Analyst

Target Audience: QRT and Management

Discussion:

Please remember to only use a BCID on the SSA debt memos and supporting documents in the SSA Debt Tracker.

Target Audience: QRT and Management

Discussion:

P&F has seen several claims where dual entitlement was missed. When reviewing claims, please remember to check the SSA screen to determine if dual entitlement to SSA benefits exists.

Where to Look:

During SSA reviews, near the bottom of the screen (see below), located the blocks **Cross-reference Account Numbers** and **Dual Entitlement CAN List**.

If all blocks are blank, this indicates no dual entitlement exists and no additional user action needed.

If data is identified, a user must take the appropriate action(s) outlined below to determine if additional SSA income is being received that is countable for VA purposes.

Monthly Benefit Credited

Date	Amount	Type

Cross-reference Account Numbers

CAN	BIC	Code
#####	D	O

Dual Entitlement CAN List

	CAN	BIC
<input type="radio"/>		

Run SSA Inquiry

Actions to Verify Dual Entitlement:

First, If the **Dual Entitlement CAN List** has data listed (such as an SSN), select the circle that will appear, then select **“Run SSA Inquiry.”**

Next, review for the **Cross Reference Account Number** Block to determine if there is **CAN** or **BIC** data listed in either of these fields.

- o If the **CAN and BIC** fields are blank, (no matter what is in the other blocks), take the steps below:
 - Select the **“Run SSA Inquiry”** field.
 - If user is prompted for **BIC Code**, enter the single letter (step 1, circled above).
 - IF BIC Code is blank: User must try to determine BIC code. Try to enter “B” or “C” as these are the most common. If unable to determine or identify BIC code to validate income, user must develop to SSA and the claimant for verification of SSA income.

- If the **CAN or BIC** field has an entry (no matter what is in other blocks), take below steps:
- Select the **“Run SSA Inquiry”** field.
- Entry of the **BIC code** is prompted (See below).
- User should enter the **BIC Code** data (step 1, circled above) and select **“Verify Benefits.”**
 - IF BIC Code is blank: User must try to determine BIC code. Try to enter “B” or “C” as these are the most common. If unable to determine or identify BIC code to validate income, user must develop to SSA and the claimant for verification of SSA income.
- Users must verify dual **CAN’s or BIC Code**; in the event a claimant has multiple entitlements.

* Inquiry for:

SSN:

First Name:

Middle Name:

Last Name:

DOB:

Inquire for benefits using a Claims Account Number (CAN).

* CAN:

* BIC: ←

Inquiry Reason:

Results:

- If the results provide an additional SSA income screen, this indicates that the individual may be receiving additional SSA income under dual entitlement. Review the information and determine if this has been included within the award since this income is countable for VA purposes. Develop for clarification, if needed.
- If the results do not show any additional income, no additional income exists.

Closing Comments

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 and Oversight mailbox at 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 which will include the TMS #.

The next Quality Call is tentatively scheduled for September 2024.