

**DEPARTMENT OF VETERANS AFFAIRS
Veterans Benefits Administration**



**Standard Operating Procedures
Pension and Fiduciary Service
PMC National Training Curriculum
Fiscal Year 2017**

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Introduction

This standard operating procedure (SOP) is intended to facilitate the understanding, implementation, and recording of the Pension and Fiduciary (P&F) Service Fiscal Year (FY) 2017 Pension National Training Curriculum (NTC). All Pension Management Centers (PMCs) must ensure that the procedures in this SOP are implemented upon receipt.

Definition of Training

Section 4101 of Title 5, United States Code, defines “training” as “the process of providing for and making available to an employee, and placing or enrolling the employee in, a planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education, in scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields which will improve individual and organizational performance and assist in achieving the agency’s mission and performance goals.” The PMC NTC is consistent with the statutory definition in that it prescribes specific programs of training designed to improve both individual and organizational performance.

Stations must deliver all training in accordance with the intent of the lesson. For example, if the lesson plans states the lesson is instructor-led; it must be taught as an instructor-led course. If there is a practical exercise(s) and/or media demonstration (such as a video); the practical exercise(s) and/or media demonstration **must** be used in the class.

Training Classifications

- **Curriculum:** A course of study designed for a particular purpose.
- **Station-Determined Training:** Technical training to gain or improve specific skills related to a job, function, or task; and developmental training to prepare employees to perform future jobs and/or move with the organization as it develops, changes, and grows.
- **Mandatory Training Curriculum (MTC):** 40 hours of mandatory training as identified by P&F Service.
- **National Training Curriculum (NTC):** 80 hours of required training mandated by P&F Service to include 40 hours of mandatory training and 40 hours of station-determined training, plus five (5) hours of required training for all VBA employees.

- **Talent Management System (TMS):** The recognized system for all VA training records. All training managers must ensure each employee completes the surveys at the end of the lesson plan so that credit is received for completion of training.
- **VBA Learning Catalog:** An online training catalog that is organized specifically to support the way VBA structures and manages its training programs. The training catalog is the designated focal point to recognize the target areas of P&F Service training items. Searchable functions identify mandated items and target audiences. Items are also searchable by job position; TMS item number, curriculum, etc.
 - The catalog is available at: <https://vba-tpi.vbatraining.org/lc/>

FY 2017 Training Requirements for PMC VSRs, RVSRs, and DROs

All Veterans Service Representatives (VSRs), Rating Veterans Service Representatives (RVSRs), and Decision Review Officers (DROs) working in the PMCs must complete a minimum of 85 hours of training in FY 2017 and satisfy curriculum requirements.¹ These requirements include five hours of all-employee VBA training requirements and 80 hours of training as determined by P&F Service. To satisfy the 80 hours that P&F Service requires for each group of employees, PMCs will conduct the training prescribed by the appropriate training curricula.

There are two categories of training curricula for each position of VSR, RVSR, and DRO. These categories include:

1. **P&F Service Mandatory Training Curriculum for PMC** – P&F Service has identified 40 hours of required training on specific topics based on national quality trends and emerging issues.
2. **Station-Determined Training Curriculum**² – Each PMC identifies 40 hours of training items based on their station needs assessments and quality trends.

All Mandatory items will be listed as Pension Mandated Training in the [VBA Learning Catalog](#). Training Managers can assign any other items listed in the [VBA Learning Catalog](#) or the [VALU Course Catalog](#) to satisfy the Station-Determined Training requirement.

¹ PMC managers must prorate training hours for employees who start after the beginning of the FY.

² This category of training is revised to combine the former station-determined with technical and developmental training, so that stations are able to have more flexibility with these assignments.

If a station-determined training item does not have an existing TMS number and/or is not listed in the [VBA Learning Catalog](#), the Training Manager must submit the lesson to the Pension Quality and Training Staff for approval and assignment of a TMS number.

Training Hours for Skills Certified Employees

PMCs may reduce to 20 hours the NTC requirements for employees who have successfully passed their respective skills certification tests and who are able to maintain the 'skills-certified status' upon retesting. In these instances, PMCs may select up to 20 hours of station-determined training from the course offerings provided by P&F Service.

Prorating FY 2017 NTC Training Requirements

Prorating FY 2017 NTC training requirements will be allowed in the following circumstances (see **Attachment 1** for full prorating details):

- Employees who first become eligible for NTC training more than one month after the beginning of the fiscal year
- Employees on extended periods of excused absence from their RO
- RVSR Challenge instructors, beginning with their fourth month away from their RO

Credit for Training

In order for training to be credited, it must satisfy all of the following criteria:

1. Station-Determined Training that is not already pre-approved by P&F Service must be requested, scheduled, and approved in advance. All pre-approved training is located in the VBA Learning Catalog at <https://vba-tpi.vbatraining.org/lc/>. Requests for approval of locally developed training should be sent to the Pension Training and Quality email box, VAVBAWAS/CO/PENSION TRNG & QUALITY. P&F Service will provide a response to the unapproved training request within 30 business days.
2. Technical training must include an evaluation of training content and instruction (online or paper evaluation).
3. Training must be recorded in the TMS and include proof of attendance for instructor-led items. PMCs must retain the sign-in sheets used to document employee participation in instructor-led training for a three-year period beginning on the date of the training. However, PMCs need not attach lesson plans to document employee participation in instructor-led training.

4. Training Managers must place employees in classes set up specifically for each job position. Each class will be tied to the proper mandated curriculum and the mandated item assignments will be automatic once an employee is added to the class. This allows Training Managers to easily move employees in and out of curricula when they change positions (refer to the FY17 Pension NTC Class Assignment Job Aid on the [TM Resources page of the Training Managers Resource Center \(TMRC\) Website](#) for additional details regarding FY17 class and curricula assignments). Training managers should place PMC employees in the following TMS classes:

- Class VBA-293 for PMC VSRs
- Class VBA-294 for PMC RVSRs and DROs

Credit Awarded to Instructors

1. Instructors may be granted credit for instructional time learning hours if they have completed an authorized VBA trainer preparation course, *such as (but not limited to)*, Foundational Instructor Training (FIT), or the Instructor Training Course (ITC) Common Core Essentials Module. The maximum total is no more than 20 hours for station-determined training requirements to be used for this purpose.
2. Preparation time of up to 20 hours for the fiscal year may be recorded under TMS item number VA 221915.
3. RVSR Centralized Challenge instructors must track the hours spent preparing Challenge instruction to receive credit toward their curriculum requirements and assist VBA in tracking the total number of instructional hours devoted to Challenge. Local managers must determine the locally required courses from which these individuals will be considered “exempt.” Actual hours spent in the preparation of Challenge lessons, excluding those hours for which an exemption was granted, will be recorded under TMS item number VA 221915.
 - For example, an RVSR Challenge instructor may be at centralized training when training courses are offered at his/her local RO. Local management will determine which curricular course(s) will be considered exempt for that individual; up to 20 hours of his/her Challenge instruction time is to be recorded under TMS item number VA 221915.
 - Instructors who complete the FIT Program will receive credit under TMS item number 4179006.
 - Instructors who complete the ITC Common Core Essentials Module will receive credit under TMS item number 3939003.

Assigning P&F Service Mandatory Pension Training Curriculum Training Items in TMS

P&F Service has created an item number in TMS for each of the P&F Service MTC lessons and will create item numbers for any additional mandatory courses added throughout the FY. The PMCs will only use these assigned TMS item numbers to ensure consistency and avoid duplication. Mandatory items will automatically populate on the TMS To-Do Lists of employees who have been added to the proper job position-specific class.

Station-Determined training lesson material is posted in the [VBA Learning Catalog](#) with a corresponding TMS item number that is to be used when assigning training. All Station-Determined training courses must be locally assigned in TMS using the associated TMS item number. The lesson material for Station-Determined courses may come from other sources, but must be approved by P&F Service, which will then create a TMS item number.

Make-up Training

Employees are required to complete all items listed in the MTC. Thus, each PMC must establish and publish a process for providing make-up training session(s) for employees who missed the original training session(s). PMCs must include the following requirements in the procedures for make-up training sessions:

- Instructor will use the same lesson plan
- Instructors will use the same materials and/or handouts
(For example, completing online exercises, demonstrating media and/or evaluations)
- The same instructor will provide the training if possible; this may be accomplished in person or by being videotaped or recorded.
- If a videotaped or recorded session is provided, PMCs will make available a subject matter expert (SME) to facilitate the class and answer questions.
- Make-up sessions are to be completed as soon as possible, but must be provided within eight weeks of the original training session.
- Instructors will use a sign-in sheet and/or Microsoft LYNC to record attendance, including the name of the SME who facilitated the make-up session when applicable. All sign-in sheets may be converted to an Excel spreadsheet to ensure accessibility.

Training Reporting Requirements

All stations must submit their station's training progress report for the applicable National Training Curriculum to P&F Service (per VBA Letter 20-13-02, Required Annual Training Compliance Reporting). Stations must submit reports in the format provided by P&F Service using reporting Excel shells (with macros) and the instructions on the [TM Resources page of the Training Managers Resource Center Website](#). Stations must submit reports at the end of each quarter during the fiscal year and no later than the 3rd workday of the month as described below:

- **1st quarter – January 5, 2017**
- **2nd quarter – April 5, 2017**
- **3rd quarter – July 6, 2017**
- **4th quarter – October 4, 2017**

Additional Information

1. During the course of the year, P&F Service may mandate additional training to address specific agency needs. Any hours over the 40-hour P&F Service MTC requirement may be applied toward the Station-Determined Training Curriculum requirement. For example, if P&F Service identifies 45 hours of training from the P&F Service MTC during the reporting period, stations may report five hours as station-determined training.
2. All authorized curriculum items will be listed in the [VBA Learning Catalog](#). Other training sources identified in TMS may also be used (e.g., VALU courses in the [VALU Course Catalog](#)).
3. P&F Service does not require trainees to complete the P&F Service NTC *until 10 months* after they have completed their Compensation Service Challenge training.
 - a. RVSRs trainees *should* complete the following courses prior to eligibility for Journey-level Skills Test Certification:

<u>TMS#</u>	<u>Item Title</u>
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3885017	RVSR PTSD 1- Evaluate Claims for PTSD
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3885019	RVSR PTSD 2- Rate Claim for PTSD
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3885021	RVSR PTSD 3- PTSD and Veteran Competency
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3885022	RVSR PTSD 4- PTSD and Individual Unemployability
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3885023	RVSR PTSD 5- PTSD and Ancillary Benefits
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3884915	RVSR New Pension- Evaluate New Pension Claims
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4183893	VSR Dependency: Determine Eligibility for Dependency
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4183894	VSR Dependency: Develop for Dependency Claims
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4183895 VSR Dependency: Granting, Denial, and Removing Dependents

3814513 VSR Total Disability Based on Individual Unemployability (TDIU)

3825367 VSR Character of Discharge (COD) Web-Based Training (WBT)

- b. P&F Service mandatory training for RVSR trainees will be prorated for the remainder of the fiscal year following the 10-month period the RVSR completed the Compensation Service RVSR-mandated Challenge training.

Example:

A PMC RVSR is hired in January 2016. The RVSR completes the required Compensation Service Challenge in February 2017. Since the overlapping period crosses over into one quarter of FY 17 the RVSR is only responsible for 75% of the Pension NTC for FY 17. This would include 75% of the 40 hours of mandatory training and 75% of the 40 hours of station-determined training. Therefore, the RVSR would be required to complete 30 hours of the mandatory training and 30 hours of station-determined training in in FY 17.

Attachment 1: Prorating FY 2017 Training Requirements

PMC Training Managers may prorate P&F Service FY 2017 NTC Training Requirements in the following circumstances:

- Employees become eligible for NTC training after the first month of the fiscal year.
- Employees on extended periods of excused absence from their PMC. Examples of eligible periods of excused absences include the following:
 - Consecutive active duty or active duty for training absence for 30 consecutive days or more
 - Cumulative active duty or active duty for training absence for 30 days or more
 - Consecutive leave for 30 days or more including leave under the Family and Medical Leave Act (FMLA)
 - Cumulative sick leave or FMLA for the same illness or disease of 30 days or more; single days of sick leave not excused by a physician's approval will not count as time applied for prorated hours
 - Instructors with absences for local training requirements, and
 - Instructors teaching Challenge Training

Instructors may apply up to 20 hours of teaching or instruction to the National Training Requirements. Instructors teaching RVSR Challenge training for at least three months may prorate beginning with the fourth month away at Challenge training (applicable to RVSR Challenge trainers).

When Training Managers prorate training requirements in the circumstances described above, they will maintain documentation approving the reduced training for the current fiscal year in the employees' training file. Satisfactory documentation of approval for prorated training consists of a memorandum from the employee's immediate supervisor with the name of the employee, period of time and amount of days that have been approved as extended periods of leave. The documentation will be kept confidential and will only be presented to the RO Director's office of the RO for compliance purposes with the National Training Requirements. The RO Director will certify the proper documentation is of record and all prorated training requirements are in compliance.

Example of documentation for extended excused absence

Memorandum

From: (Employee's Immediate Supervisor's Name)
To: (Regional Office Name) Training Manager
Subject: (Employee Name) approved extended leave

The above-mentioned employee has been authorized extended absence as follows:

March 1 to April 1, 2017: Extended approved sick leave 31 Days
June 1 to July 1, 2017: Extended approved military leave 30 Days

Signed by (Immediate Supervisor)

Calculating prorated training items

Calculation of prorated items:

- Any prorating of training requirements based on absences will be applied 50% to mandatory items and 50% to station-determined items.

Calculated examples:

- **Example one:** Employee's first year as a VSR ends on January 1, 2017. The employee must complete nine months of training to be in compliance with the National Training Requirements.
 - $9/12 = .75$
 - $80 \times .75 = 60$ hours
 - 50% of 60 (30 hours) must be devoted to mandatory hours
 - 50% of 60 (30 hours) must be devoted to elective hours
- **Example two:** Employee is promoted from VSR to RVSR on July 1, 2016. The first year as an RVSR ends on June 30, 2017. The employee must complete three months of RVSR training requirements (July 1, 2017 to September 30, 2017) to comply with RVSR National Training Requirements.
 - $3/12 = .25$
 - $80 \times .25 = 20$ hours
 - 50% of 20 (10 hours) must be devoted to mandated hours
 - 50% of 20 (10 hours) may [or must] be devoted to elective hours

From October 1, 2016 through June 30, 2017 the employee is in a “trainee status,” and, during that time, must start to complete the mandated hours of training for the complete fiscal year. Any NTC elective training completed during these nine months will count towards the 10 hours that are required for this employee by the end of the fiscal year, even if the training was completed before July 1, 2017.

Excessive mandatory hours over the required hours will apply to the station-determined hours.

Note: The P&F Service reporting Excel shells located on the TM Resources page of the [Training Managers Resource Center](#) Website allow Training Managers to adjust an employee’s proration and automatically calculate the employee’s training requirements for the fiscal year. Training Managers should ensure any adjustments in proration are included in the quarterly reports they submit to P&F Service.