



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 3 PMC VSR Resources

Lesson 4: Pension EPSS

Trainee Guide

October 28, 2016

Version 1.0

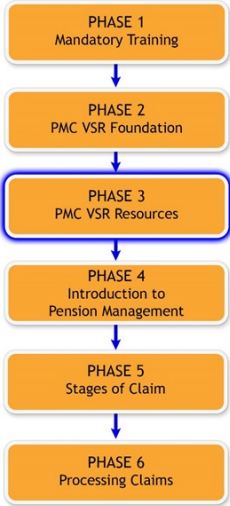
**Lesson 4: Pension EPSS
Trainee Guide**

Pension EPSS

Lesson Overview

Topic	Description
Time Estimate:	30 minutes
Purpose of the Lesson:	The purpose of this lesson is to prepare you to locate and use the appropriate Electronic Performance Support System (EPSS) from the VSR Assistant.
Prerequisite Training Requirements:	Prior to taking the Pension EPSS lesson, you must complete PMC VSR Core Course Phases 1–2 and Phase 3 Lessons 1-3.
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> • VSR Assistant • Master Course Map learning aid
Knowledge Check:	Phase 3: PMC VSR Resources Knowledge Check
Technical Competencies:	VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> • Locate information in EPSS <ul style="list-style-type: none"> ○ Define the purpose of an EPSS ○ Select the appropriate EPSS ○ Locate the appropriate EPSS ○ Navigate the EPSS
What You Need:	<ul style="list-style-type: none"> • Trainee Guide • Master Course Map learning aid • Access to VBA intranet


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PowerPoint Slides	Notes
Lesson 4: Pension EPSS	
You Are Here  <pre>graph TD; P1[PHASE 1 Mandatory Training] --> P2[PHASE 2 PMC VSR Foundation]; P2 --> P3[PHASE 3 PMC VSR Resources]; P3 --> P4[PHASE 4 Introduction to Pension Management]; P4 --> P5[PHASE 5 Stages of Claim]; P5 --> P6[PHASE 6 Processing Claims];</pre>	
Why It Matters! <ul style="list-style-type: none">• An Electronic Performance Support System (EPSS) provides step-by-step guidance for performing complex and/or infrequently performed tasks.• Use of EPSSs reduces errors.	
Technical Competency <ul style="list-style-type: none">• VBA Applications (PMC VSR)	

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PowerPoint Slides	Notes
<p>Objectives</p> <ul style="list-style-type: none"> • Locate information in EPSS. <ul style="list-style-type: none"> ○ Define the purpose of an EPSS. ○ Select the appropriate EPSS. ○ Locate the appropriate EPSS. ○ Navigate the EPSS. 	
<p>Knowledge Check</p> <pre> graph TD P1[PHASE 1 Mandatory Training] --> C1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> C2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> C3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> C4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> C5{Multiple Knowledge Checks} P5 --> P6[PHASE 6 Processing Claims] P6 --> C6{Multiple Knowledge Check} </pre>	

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PowerPoint Slides	Notes
<p>What is an EPSS?</p> <ul style="list-style-type: none">• An EPSS is a tool that:<ul style="list-style-type: none">○ Is easily accessible online○ Provides step-by-step guidance○ Supports claim processing and decision making○ Contains tutorials○ Includes links to references and forms	
<p>EPSSs for the PMC VSR</p> 	

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PowerPoint Slides	Notes
<p>Selecting an EPSS</p> <ul style="list-style-type: none"> You may use more than one EPSS to complete a claim Select EPSSs based on the decisions you need to make 	
<p>Example 1</p> <p>Determine the effective date for a claim for an original survivors (death) pension award.</p>	
<p>Example 2</p> <p>Determine due process requirements for initiating due process for information received from a third party.</p>	

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PowerPoint Slides	Notes
<p>Example 3</p> <p>Calculate if income is within limits when requested income evidence is received.</p>	
<p>Navigating EPSS</p>  <p>The screenshot shows a web browser window with the title 'Income/Net Worth Determination'. The page has a blue header with navigation links: MENU, FAQ, RESOURCES, GLOSSARY, PRINT, HELP, COMMENTS, VSR ASSISTANT START PAGE, and EXIT. The main content area is titled 'Income/Net Worth Determination Menu' and contains several sections with bullet points, including 'Initiating an Income and Net Worth Determination', 'Continuing an Income and Net Worth Determination after Evidence is Received', and 'Completing an Income and Net Worth Determination after Suspense Expires'. A 'QID Jump' link is at the bottom.</p>	

Income/Net Worth Determination

[MENU](#)
[FAQ](#)
[RESOURCES](#)
[GLOSSARY](#)
[PRINT](#)
[HELP](#)
[COMMENTS](#)
[VSR ASSISTANT START PAGE](#)
[EXIT](#)

Income/Net Worth Determination Menu

Income/Net Worth Determination Tutorial

Initiating an Income and Net Worth Determination

- Improved Pension Claim Requires Income and Net Worth Determination

Continuing an Income and Net Worth Determination after Evidence is Received

- Requested Income Evidence Received
- Requested Incomplete Net Worth Information Received
- Requested Income and Net Worth Information Received Together
- Requested Evidence of Possible Hardship Exclusion Received
- Requested Corpus of Estate Determination Information Received

Completing an Income and Net Worth Determination after Suspense Expires

- Suspense for Requested Income Evidence Expires and No Evidence is Received
- Suspense for Requested Net Worth Evidence Expires and No Evidence is Received
- Suspense for Requested Income and Net Worth Evidence Expires and No Evidence is Received
- Suspense for Requested Corpus of Estate Determination Information Expires and No Evidence is Received

QID Jump

Income/Net Worth Determination Menu

To determine income and net worth, compare a veteran's household financial information to VA limits regarding pension eligibility. On the Income/Net Worth Determination Menu to the left, select a **Menu option** from one of the following:

Income/Net Worth Determination Tutorial
Select this option for a general overview of an income and net worth determination.

Initiating an Income and Net Worth Determination:
Select this option when you begin an income and net worth determination for an Improved Pension claim.

Continuing an Income and Net Worth Determination after Evidence is Received
Select this option if you receive requested income and net worth evidence.

Completing an Income and Net Worth Determination after Suspense Expires
Select this option if the suspense on a request for additional income and or net worth evidence has expired.

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PowerPoint Slides	Notes
<p>Activity: Navigating EPSS</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Form small groups of two or three people○ Read directions on the Navigating EPSS Activity○ Complete the activity; be prepared to share your responses• Time allowed: 10 minutes	


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Navigating EPSS Activity

Work in your small groups to find the answers to the questions below using the EPSSs. You have 10 minutes to answer the questions and document where you located the answer in the EPSS. You may be asked to give your answer and show where you found it. The team with the most correct answers wins.

1. Which of the six EPSSs for the PMC VSR include a tutorial?
2. What is the VA definition of incompetency?
3. What is the CFR reference for effective dates?
4. Define IVAP?
5. What is the wartime period for the Vietnam era?
6. What are the CFR references applied for adjusting a Veteran's benefits as he or she is readmitted into a facility?

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PowerPoint Slides	Notes
<p>Discussion</p> <ul style="list-style-type: none">• What are some uses for an EPSS?• Where can you find the link to the EPSSs?• Which EPSSs are most useful for the PMC VSR?• Are you comfortable using an EPSS to find information to perform a task or make a decision?• What was the most useful feature you noted in the EPSSs?	
<p>Questions?</p> 	
<p>What's Next?</p> <p>Overview of Pension Systems and Applications</p>	