PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course

Phase 3: PMC VSR Resources

Lesson 5: Overview of Pension Systems and Applications

Trainee Guide

October 28, 2016

Version 1.0

Overview of Pension Systems and Applications
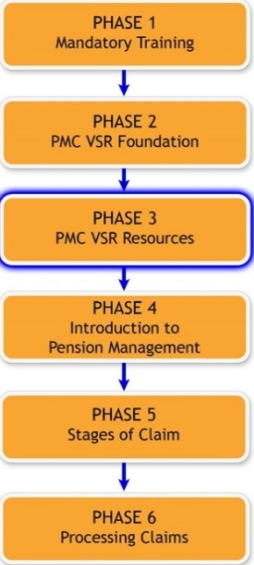
Lesson Overview

Topic	Description
Time Estimate:	2 hours
Purpose of the Lesson:	This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to provide you an overview of systems used by PMC VSRs to process claims.
Prerequisite Training Requirements:	Prior to taking the Overview of Pension Systems and Applications lesson, you must complete: • PMC VSR Core Course Phases 1–2 • PMC VSR Core Course Phase 3, Lessons 1–4
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	• Software systems user manuals on the VBA intranet • **Master Course Map** learning aid • **Pension Systems and Applications** job aid
Knowledge Check:	Phase 3: PMC VSR Resources Knowledge Check
Technical Competencies:	VBA Applications (PMC VSR)
Lesson Objectives:	• Identify the purpose of systems used to initiate, develop, and process claims • Locate systems used to initiate, develop, and process claims • Log in to systems used to initiate, develop, and process claims • Navigate Compensation and Pension Knowledge Management portal

Topic	Description

What You Need:	• Trainee Guide
	
	• **Master Course Map** learning aid
	
	• **Pension Systems and Applications** job aid
	
	• TMS # 3971406 Introduction to Compensation and Pension Knowledge Management (CPKM) Portal video and Adobe Flash to run it.
	
	• Access to VBA intranet
	
	• Access to each system:
	   o CPKM
	   o SHARE
	   o Virtual VA
	   o VBMS
	   o VBMS-A
	   o MAP-D
	   o VETSNET
	   o COVERS
	   o PIES
	   o DPRIS
	   o PCGL
	   o FAS
	   o VACOLS
	   o CAPRI
	
	• Log in information including user names and passwords for each system.
	
	• A computer with access to the VBA intranet

PowerPoint Slides	Notes

PowerPoint Slides	Notes
Overview of Pension Systems and Applications	
You Are Here PHASE 1 Mandatory Training PHASE 2 PMC VSR Foundation PHASE 3 PMC VSR Resources PHASE 4 Introduction to Pension Management PHASE 5 Stages of Claim PHASE 6 Processing Claims	

PowerPoint Slides	Notes

Why It Matters!
 	
• All claims require systems to process
• You will use systems to:
  o Initiate claims
  o Develop evidence for claims
  o Promulgate the awards for claims
  o Notify the claimant of actions taken on the claim
• If you don't know which system to use or how to access it, you can't do the work of the PMC VSR.
• Not knowing the systems has a rippling effect in terms of errors. Ultimately, it is the Veteran who will be affected.	

Technical Competency • VBA Applications (PMC VSR)	
Objectives • Identify the purpose of systems used to initiate, develop, and process claims. • Locate systems used to initiate, develop, and process claims. • Log in to systems used to initiate, develop, and process claims. • Navigate Compensation and Pension Knowledge Management portal.	

PowerPoint Slides	Notes
Knowledge Check 	

Pension Systems and Applications Job Aid
 	
• Instructions
 	
    o Access **Pension Systems and Applications** job aid, located in the VSR Assistant from the PMC VSR button
 	
    o Select Pension Systems and Applications
 	
    o Consider which systems you think you will use most frequently
 	
• Time allowed: 10 minutes	

Question 1 Which system is used to update the corporate record?	
Answer:	

PowerPoint Slides	Notes
Question 2 Which system is used to view rating decision information and payment information?	
Answer:	
Question 3 Which system in development will eventually replace VETSNET?	
Answer:	
VBMS-A The Veterans Benefits Management System Awards (VBMS-A) generates awards for beneficiaries.	
Question 4 Which system is used for preparing development letters?	
Answer:	
Question 5 Which system is used for preparing other forms of correspondence with the claimant?	

PowerPoint Slides	Notes
Answer:	
Question 6 Which system provides PMC VSR access to a Veteran's electronic claims folder (e-folder) and eliminates the need to locate the paper file?	
Answer:	
Question 7 Which system is used to track the location of paper folders within and between offices?	
Answer:	
Question 8 Which system is used to review a claimant's payment and accounting information?	
Answer:	

PowerPoint Slides	Notes
Question 9 Which systems are used to verify service dates and request service treatment records?	
Answer:	
Question 10 Which system is used to view the status of an appeals case?	
Answer:	
Question 11 Which system is used to access medical information about beneficiaries who have received care by a Veterans Affairs Medical Center (VAMC)?	
Answer:	
User Guides User guides for the systems are available from the VBA intranet at vbaw.vba.va.gov/bl/21/index.htm	

PowerPoint Slides	Notes

CPKM Video
 	
• Instructions:
 	
   o Launch TMS
 	
   o Select Introduction to Compensation and Pension Knowledge Management (CPKM) Portal
 	
   o Watch the video
 	
   o Use the steps in the job aid to access CPKM
 	
• Time allowed: 15 minutes	

Summary • Purpose • Location • Access	
Questions? 	
What's Next Phase 3: PMC VSR Resources Knowledge Check Preparation	