



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 4: Introduction to Pension
Management

Lesson 4: Provide Benefit Information

Trainee Guide

October 28, 2016

Version 1.0

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Provide Benefit Information

Lesson Overview

Topic	Description
Time Estimate:	1 hour
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 prepare you to respond to direct inquiries from beneficiaries requesting benefit information.
Prerequisite Training Requirements:	Prior to taking the Provide Benefit Information lesson, you must complete PMC VSR Core Course: <ul style="list-style-type: none">• Phases 1–3• Phase 4, Lessons 1-3

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Topic	Description
Lesson References:	<ul style="list-style-type: none"> • Master Course Map learning aid • VA Form 27-0820 (Report of General Information) • VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) • M27-1 I.2.2 (Providing Information to a Third Party) • M27-1 I.2.3 (Providing Information About VA Benefits) • M27-1 I.2.6 (Handing Non-Claim Actions) • M27-1 I.2.7 (Claimant Representation by Non-Attorney or Non-Accredited Agents) • M27-1 I.7 (Freedom of Information Act [FOIA] and Privacy Act [PA]) <ul style="list-style-type: none"> ○ M27-1 I.2.7.a (Regulatory References for Claimant Representation) ○ M27-1 I.2.7.b (Background on Claimant Representation) • 38 CFR 14.630 (Authorization for a Particular Claim) • 38 CFR 1.502 (Disclosure of the Amount of Monetary Benefits) • Provide Benefit Information job aid
Knowledge Check:	Phase 4: Introduction to Pension Management Knowledge Check
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> • Respond to direct inquiries from callers requesting benefit information <ul style="list-style-type: none"> ○ Verify inquirer before providing information ○ Provide correct pension benefit information ○ Document the call in Modern Awards Processing Development (MAP-D) notes and/or on VA Form 27-0820

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Topic	Description
What You Need:	<ul style="list-style-type: none"> • Trainee Guide • Master Course Map learning aid • Access to VBA Intranet • Access to CPKM • Access to the Provide Benefit Information job aid from VSR Assistant • Access to Accreditation Search Website • Paper for group activity

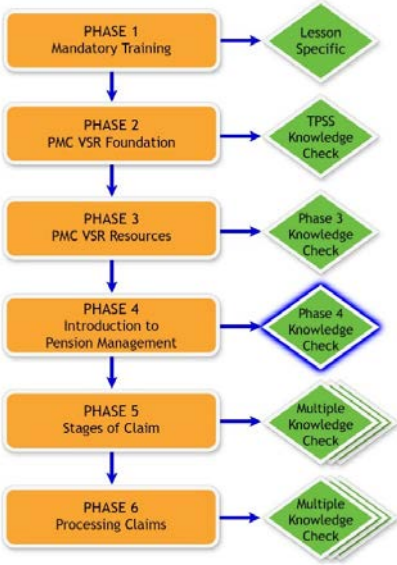
Comment [VE(1): Do the claims need to be added here?

PowerPoint Slides	Notes
Provide Benefit Information	
<p>You Are Here</p> <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>	

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PowerPoint Slides	Notes
<p>Icebreaker Activity</p> <p>Scenario:</p> <ul style="list-style-type: none">• You receive a phone call from a person requesting information about benefits for Veteran John C. Hall. How do you respond?• The next steps are critical because they can affect the benefits and privacy of a Veteran or beneficiary. Performing these steps incorrectly, could put the benefits received by a Veteran or beneficiary in jeopardy.	
<p>Technical Competencies</p> <ul style="list-style-type: none">• Program Benefits and Eligibility (PMC VSR)• VBA Applications (PMC VSR)	
<p>Lesson Objectives</p> <ul style="list-style-type: none">• Respond to direct inquiries from callers requesting benefit information.<ul style="list-style-type: none">○ Verify the inquirer before providing information.○ Provide correct pension benefit information.○ Document the call in Modern Awards Processing Development (MAP-D) notes and/or on VA Form 27-0820.	

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PowerPoint Slides	Notes
<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 Check} P5 --> P6[PHASE 6 Processing Claims] P6 --> C6{Multiple Knowledge Check} </pre>	
<p>For Your Review</p> <ul style="list-style-type: none"> • Review M27-1 I.7 (Freedom of Information Act [FOIA]) • Review Privacy Act (PA) • Review how to conduct a reference search 	

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PowerPoint Slides	Notes
<p>Verify Inquirer</p> <ul style="list-style-type: none">• Determine if the caller is a Veteran or surviving dependent (first party).• Verify the caller's ID by requesting that the caller provide at least 3 specific pieces of information about the beneficiary that is contained in SHARE, such as:<ul style="list-style-type: none">○ Beneficiary's SSN○ Beneficiary's date of birth○ Veteran's branch of service○ Dates of the Veteran's service○ Caller's full name (not required if caller has already been confirmed as the Veteran)	

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PowerPoint Slides	Notes
<p>Authorized Third Party Caller (1 of 4)</p> <ul style="list-style-type: none">• Determine if the caller is a beneficiary or fiduciary.• If the caller is a Veterans Service Organization (VSO) or Power of Attorney (POA), verify his or her identity by asking for applicable identifying information, such as the POA's:<ul style="list-style-type: none">○ Name○ Organization○ County represented, if applicable○ Telephone number• Verify accreditation by navigating to the Accreditation Search and confirming that he or she is listed on the beneficiary's file.	

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PowerPoint Slides	Notes
<p>Authorized Third Party Caller (2 of 4)</p> <ul style="list-style-type: none">• If a POA is found in the accreditation search, treat the POA as a first party caller and ask for the Veteran's:<ul style="list-style-type: none">○ Full name○ SSN or claim number○ Branch of service• If the POA does not know any identifying information, inform the POA that you will need one of the following:<ul style="list-style-type: none">○ A written request from the Veteran or claimant (i.e., VA Form 21-0845, Authorization to Disclose a Record in the Presence of a Third Party)○ The Veteran or claimant to call VA, or a call back when the unknown information is located• If the POA's organization is not showing in the system:<ul style="list-style-type: none">○ Tell the POA that you do not show the organization as having POA.	

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<p>Authorized Third Party Caller (3 of 4)</p> <ul style="list-style-type: none">• If the individual is listed on the VA Form 21-0845 (Authorization to Disclose Personal Information to a Third Party), verify the security question under box 11 on the form in addition to ID protocol requirements.• VA will accept only one person or organization as an authorized party listed on this form.	
<p>Authorized Third Party Caller (4 of 4)</p> <ul style="list-style-type: none">• Specifics about the claim can be communicated to this authorized person; however, you cannot take information from him or her as a first party to adjust benefits.• Individuals acting under the provisions of 38 CFR 14.630 (Authorization for a Particular Claim) are commonly known or referred to as "lay-persons."• Any person may be authorized to prepare, present, and prosecute one claim. Reference: M27-1 I.2.7.a-b (Claimant Representation by Non-Attorney or Non-Accredited Agents).	

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PowerPoint Slides	Notes
<p>Pop Quiz</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of two.○ Access the Provide Benefit Information job aid.○ Review the questions.○ Write answers on a blank sheet of paper.○ Submit answers to instructor.• Time allowed: 5 minutes	
<p>Pop Quiz</p> <ul style="list-style-type: none">• Question #1: What information do you need to verify a caller's identity?• Question #2: What must you verify if the caller is a VSO or POA?	
<p>Pop Quiz Answers</p>	
<p>Caller Story</p> <ul style="list-style-type: none">• Common errors made during calls are:<ul style="list-style-type: none">○ Giving out too much information to someone who is not authorized○ Providing too much information to a POA	

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PowerPoint Slides	Notes
<p>Provide Benefit Information— First Party</p> <ul style="list-style-type: none"> • PMC VSR may provide the status of a claim to any first party call after verification: <ul style="list-style-type: none"> ○ Initial review pending ○ Development ○ Due process ○ Authorization 	
<p>Provide Benefit Information— Third Party</p> <ul style="list-style-type: none"> • The current amount of monthly public funds (VA benefits) paid to a VA beneficiary is considered public information and can be released to anyone. • The caller must be an authorized third party to receive any other kind of benefit information. 	
<p>General VA Questions</p> <ul style="list-style-type: none"> • General VA questions should be answered to include the following: <ul style="list-style-type: none"> ○ Help with forms ○ Verification of benefit rate ○ Description of pension ○ PMC fax number or mailing address ○ National Calling Center (NCC) toll free number 	

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PowerPoint Slides	Notes
<p>Practice Exercise—Scenario</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Review the scenario on the next slide. ○ Access to Provide Benefit Information job aid. ○ Write responses on a sheet of paper. ○ Once completed, trade answers with another trainee and compare. • Time allowed: 5 minutes 	
<p>Group Activity—Scenario</p> <p>Scenario:</p> <p>You receive a call from a woman named Jennifer Fein. Ms. Fein states that she is the POA for Veteran Lindsay McCaffrey and that she would like to know what benefits Ms. McCaffrey is receiving and the dollar amounts being received. You have obtained the POA's identifying information and confirmed that that POA is accredited. Based on the information provided, what information can you give Ms. Fein?</p>	
<p>Group Activity—Scenario Answers</p>	


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<p>Document the Call</p> <p>Document, in MAP-D or VA Form 27-0820 (Report of General Information), any necessary information based on the type of caller, such as:</p> <ul style="list-style-type: none">• Claimant• Fiduciary• VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party)• VSO/POA• Others	
<p>Practice Exercise—Scenario</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Review the scenario on the next slide.○ Access the Provide Benefit Information job aid.○ Using the provided VA Form 27-0820 (Report of General Information), document the form the way you would as if the scenario was a phone call taking place.○ Once completed, trade answers with another trainee and compare.• Time allowed: 5 minutes	

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<p>Practice Exercise—Scenario</p> <p>Scenario:</p> <p>You receive a call from a woman named Jennifer Fein. Ms. Fein states that she is the POA for Veteran Lindsay McCaffrey and that she would like to know what benefits Ms. McCaffrey is receiving and the dollar amounts. You have obtained the POA’s identifying information and confirmed that that POA is accredited. Based on the information provided, what information can you give Ms. Fein?</p>	
<p>Concept Review—Trivia Game</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into pairs. ○ Access to Provide Benefit Information job aid. ○ Review the question given. ○ Have one team member raise a hand when ready to answer. • Total of 5 questions: <ul style="list-style-type: none"> ○ Question 1: 5 pts ○ Question 2: 4 pts ○ Question 3: 3 pts ○ Question 4: 2 pts ○ Question 5: 1 pt • Time allowed: 10 minutes 	

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PowerPoint Slides	Notes
Concept Review—Trivia Game	
Concept Review—Trivia Game Answers (1 of 2)	
Concept Review—Trivia Game Answers (2 of 2)	
<p>Lesson Summary</p> <ul style="list-style-type: none"> • Verifying the caller is extremely important when you receive a request for benefits as you are the only one able to provide information regarding the benefits of the Veteran or beneficiary. • Be cautious when providing information to a third party caller as the caller may not be authorized to receive all benefit information. 	
<p>Questions?</p> 	
<p>What's Next</p> <p>Phase 4: Introduction to Pension Management Knowledge Check Preparation</p>	