



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 1: Determine Eligibility

Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims

Trainee Guide

October 28, 2016

Version 1.0

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims

Lesson Overview

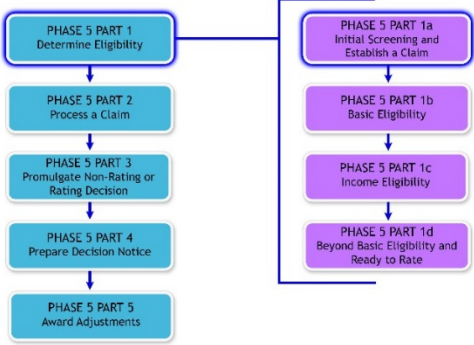
Topic	Description
Time Estimate:	1.5 hours
Purpose of the Lesson:	This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to prepare you to identify special claims that should be expedited (priority) or have a flash and those that are previous claims or part of a dual claim.
Prerequisite Training Requirements:	Prior to taking the Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims lesson, you must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1, lessons 1–2. (Refer to the Master Course Map learning aid for a list of lessons.)
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> • M21-1 III.ii.1.D (Claims That Require Priority Processing) • M21-1 III.iii.1.D.1.b (Claimant Flashes) • M21-1 II.iv.2.B.3.d (New and Material Evidence) • M21-1 I.5.A.2.b (Overview of the Appeal Process) • Master Course Map learning aid • Pension Systems and Applications job aid
Knowledge Check:	Phase 5: Stages of a claim, Part 1(a): Initial Screening and Claims Establishment Knowledge Check
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

Topic	Description
Lesson Objectives:	<ul style="list-style-type: none"> • Confirm the special claim types • Check whether an original claim was previously established • Check whether the original claim had a prior decision • Check whether evidence is new and material evidence • Determine if an appeal is pending
What You Need:	<ul style="list-style-type: none"> • Trainee Guide • Master Course Map learning aid • Access to VBA Intranet • Pen and paper • Access to the following systems: <ul style="list-style-type: none"> ○ SHARE ○ MAP-D ○ VBMS ○ VACOLS • Access to the Pension Systems and Applications job aid from VSR Assistant

PowerPoint Slides	Notes
Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims	
You Are Here	

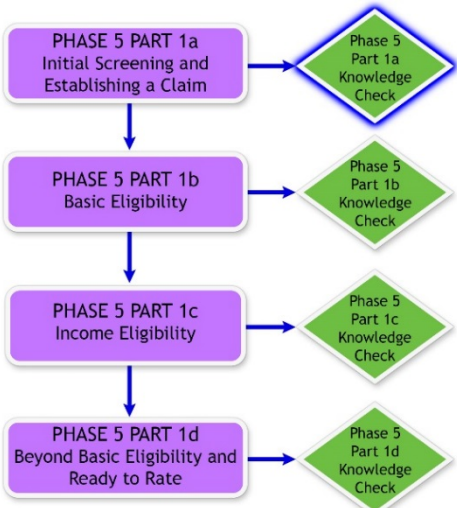
**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
 <pre> graph TD subgraph Column1 [] direction TB P5P1[PHASE 5 PART 1 Determine Eligibility] --> P5P2[PHASE 5 PART 2 Process a Claim] P5P2 --> P5P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P5P3 --> P5P4[PHASE 5 PART 4 Prepare Decision Notice] P5P4 --> P5P5[PHASE 5 PART 5 Award Adjustments] end subgraph Column2 [] direction TB P5P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim] --> P5P1b[PHASE 5 PART 1b Basic Eligibility] P5P1b --> P5P1c[PHASE 5 PART 1c Income Eligibility] P5P1c --> P5P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] end P5P1 --- P5P1a </pre>	
<p>Initial Screening</p> <ul style="list-style-type: none"> • Complete or Incomplete Applications for Benefits • Fully Developed Claims • Flash, Expedited (Priority), Previous, Reopened and Dual Claims • Date of Claim • Validate POA • End Product Codes • Introduction to Old Law and Section 306 Pension 	


**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>What Do You Do?</p> <p>On November 17, 2015, the St. Paul PMC received a VA Form 21-527 EZ application for Service-Connected (SC) pension benefits for Veteran Delinda Wright. Ms. Wright lives in Chaska, MN, which is in the jurisdiction. Ms. Wright can be properly identified in SHARE. All of the information on the application has been completed and the application has been signed. There is a flash on the application.</p>	
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) 	
<p>Lesson Objectives</p> <ul style="list-style-type: none"> • Confirm the special claim types. • Check whether an original claim was previously established. • Check whether the original claim had a prior decision. • Check whether evidence is new and material evidence. • Determine if an appeal is pending. 	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B[PHASE 5 PART 1b Basic Eligibility] B --> C[PHASE 5 PART 1c Income Eligibility] C --> D[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] A --> A1{Phase 5 Part 1a Knowledge Check} B --> B1{Phase 5 Part 1b Knowledge Check} C --> C1{Phase 5 Part 1c Knowledge Check} D --> D1{Phase 5 Part 1d Knowledge Check} </pre>	
<p>Claims That Require Priority Processing</p> <ul style="list-style-type: none"> • Part of reviewing the work of the Claims Assistant requires checking whether the claim is a special claim that requires priority processing. • Special claims are flashed through the Intake Processing Center (IPC) and indicated in MAP-D, SHARE, and VBMS. • If you discover a claim that is not flagged through IPC, but should be, flag or correct the claim for special processing. 	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Flash a Claim</p> <ul style="list-style-type: none">• MAP-D• SHARE• VBMS 	
<p>Group Practice Exercise— Does the Claim Require Priority Processing?</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide trainees into two groups.○ Access CPKM to use the M21-1 to complete the exercise.○ Provide each group with a demo claim.○ Have each group review the claim and determine if the claim requires priority processing.• Time allowed: 5 min.	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Group Practice Exercise—Does the Claim Require Priority Processing? Answers</p> <p><i>Answers provided by instructor based on example claims selected.</i></p>	
<p>Reviewing Other Types of Claims</p> <ul style="list-style-type: none">• Along with priority claims, you will also review the following types of claims:<ul style="list-style-type: none">○ Previous claim○ Dual claim (rare)○ Reopened/new claim• These claims involve reviewing various systems/applications, depending on the information needed.	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Original Claim was Previously Established (Previous Claim)</p> <ul style="list-style-type: none"> • SHARE <ul style="list-style-type: none"> ○ In the Corporate screen, review the information found in Claims and Denial and/or Award and Ratings to check if an original end product (EP) was previously processed or if the beneficiary is currently receiving benefits. • BIRLS <ul style="list-style-type: none"> ○ Review the Inactive Comp and Pension (ICP) screen for Veteran awards. • VBMS <ul style="list-style-type: none"> ○ Review VBMS to check if the claim was previously submitted or information was previously submitted. 	
<p>Original Claim Had Prior Decision (Previous Claim)</p> <p>To check if an original claim had a prior decision:</p> <ul style="list-style-type: none"> • Review the claims folder (if paper). • Look for a notification letter, award print, or claim information in VBMS. • Review the Corporate screen in SHARE under Claims and Denials or Awards. 	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Dual Claims</p> <ul style="list-style-type: none"> • Dual claims are claims that are developed for pension and compensation benefits. • Dual claims are indicated in SHARE or VBMS. 	
<p>New and Material Evidence (Reopened or New Claim)</p> <ul style="list-style-type: none"> • For a reopened/new claim, check for new and material evidence. • Review evidence to ensure it is not a duplication of information already on record, and refer for a rating if applicable. 	
<p>An Appeal Is Pending</p> <p>Check if an appeal is pending for a claim by:</p> <ul style="list-style-type: none"> • Reviewing SHARE for an EP 170 code (series pending) • Checking VACOLS • Reviewing information associated with claim in VVA or VBMS 	

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Practice Exercise—Claim 4, 5, and 6</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide trainees into three groups.○ Each group will receive claim information:<ul style="list-style-type: none">▪ Group 1: Claim 4▪ Group 2: Claim 5▪ Group 3: Claim 6○ Instruct each group to perform a review on the claim, checking if the claim is a previous claim, dual claim, new/reopened claim, and if the claim has an appeal pending.○ Select one person in each group to present their findings.• Time allowed: 10 min.	

Practice Special Claims Worksheet

For each claim provided by the instructor, answer the questions below. Include references to the M21-1 and sections of the claim in your explanations.

Claim 4

1. Is the claim a previously established claim?

2. Is the claim a dual claim?

3. Does the claim contain new and material evidence indicating it is a new/reopened claim?

***Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide***

4. Does the claim information indicate that an appeal is pending?


Claim 5

1. Is the claim a previously established claim?
2. Is the claim a dual claim?
3. Does the claim contain new and material evidence indicating it is a new/reopened claim?
4. Does the claim information indicate that an appeal was pending?

Claim 6

1. Is the claim a previously established claim?
2. Is the claim a dual claim?
3. Does the claim contain new and material evidence indicating it is a new/reopened claim?
4. Does the claim information indicate that an appeal is pending?

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
Trainee Guide**

PowerPoint Slides	Notes
<p>Practice Exercise—Demo Claim Answers</p> <ul style="list-style-type: none"> • Is the claim a previously established claim? • Is the claim a dual claim? • Does the claim contain new and material evidence indicating it was a new/reopened claim? • Does the claim information indicate that an appeal was pending? 	
<p>Lesson Summary</p> <p>Key concepts of this lesson:</p> <ul style="list-style-type: none"> • Confirm the special claim types. • Check whether an original claim was previously established. • Check whether the original claim had a prior decision. • Check whether evidence is new and material evidence. 	
<p>Questions?</p> 	
<p>What's Next</p> <ul style="list-style-type: none"> • Phase 5, Part 1, Lesson 4: Date of Claim • Review of all job aids and references provided in this lesson. 	