Pension and fiduciary service

PMC VSR Basic Core Course

Phase 3: PMC VSR Resources

Phase 3 Knowledge Enhancer Preparation (KE Prep)

Trainee Guide

December 2024

Phase 3: Knowledge Enhancer Preparation

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 1.5 hour |
| Purpose of the Lesson: | This Knowledge Enhancer Preparation (KE Prep) is part of the Core Pension Training (CPT) curriculum for PMC VSRs. The purpose of the Phase 3 KE Prep is to serve as a supplemental resource that provides additional activities and content to reinforce the material covered throughout training; and also prepare the VSR for resubmission of the Level 2 assessment if needed. |
| Prerequisite Training Requirements: | Prior to taking the Phase 3 Knowledge Enhancer Preparation, you must complete PMC VSR Core Course Phases 1–3.  |
| Target Audience: | This Knowledge Enhancer preparation is for entry-level PMC VSRs. |
| Knowledge Enhancer Preparation References: | * **Common VA Terms** job aid
* **Common VA References** job aid
* **Curriculum Guide Learning Aid**
* **VBA Intranet and Pension Home Page** job aid
* **Pension Systems and Applications** job aid
* **VA Core Values and Characteristics Quick Reference**
 |
| Technical Competencies: | * Program Benefits and Eligibility (PMC VSR)
* VBA Applications (PMC VSR)
 |
| Knowledge Enhancer: | Phase 3: PMC VSR Resources Knowledge Enhancer |
| What You Need: | * Trainee Guide
* Access to the following job aids from VSR Assistant:
	+ **Common VA Terms** job aid
	+ **Common VA References** job aid
	+ **Curriculum Guide Learning Aid**
	+ **VBA Intranet and Pension Home Page** job aid
	+ **Pension Systems and Applications** job aid
	+ **VA Core Values and Characteristics Quick Reference**
 |

| PowerPoint Slides | Notes |
| --- | --- |
| Phase 3: Knowledge Enhancer Preparation |  |
| Importance of Phase 3* **Phase 3 familiarizes PMC VSRs with the resources they need to be successful performing assigned duties**
* Due to the intricacy, complexity, and abundance of information required to perform the PMC VSR tasks, knowledge of the correct resources and ability to use the resources is critical to success
* The resources will be used extensively throughout the rest of the training
 |  |
| Knowledge Enhancer Preparation Overview**This Knowledge Enhancer preparation will consist of the following:*** **Lesson objectives review**
* **Group activities/games**
* **Question/answer forum**
 |  |
| ****Phase 3 Lessons**** Phase 3 consists of the following six lessons:1. VA Terminology
2. VBA Intranet Resources for the PMC VSR
3. Overview of Pension Systems and Applications
 |  |
| **VA Terminology** * VA terminology (e.g., abbreviations, acronyms, and initialisms) is regularly used in all VSR jobs and tasks.
* It is important to know your audience when using VA terms.
* When used incorrectly, VA terms can cause confusion and misunderstanding, especially when used incorrectly with Veterans and claimants.
 |  |
| **VA Terminology Objectives*** **Identify and define common VA terms used in VA correspondence**
* **Identify when it is appropriate to use VA terms**
 |  |
| Partner Activity—Spot the VA Term* Instructions:
	+ Work in groups of two
	+ Review the letter excerpt in Part A of Appendix A: Phase 3 Worksheet to identify any VA term errors
	+ Use the **Common VA Terms** job aid
	+ Circle any errors and write the correct term or acronym (if any) next to the error
	+ Be prepared to share your finished activity with other trainees
* Time allowed: 10–15 minutes
 |  |
| Partner Activity—Spot the VA Term AnswersThe following VA terms are incorrect in the letter excerpt: |  |
| VBA Intranet Resources for the PMC VSR* VSRs need to know where to locate regulations, references, and other resources to perform on the job.
	+ Periodic changes occur to the resources
	+ Always need to use information relevant to the timing of the claim
 |  |
| VBA Intranet Resources for the PMC VSR Objective* Navigate VBA intranet sites
	+ Compensation Service Intranet
	+ Pension and Fiduciary Intranet
	+ Pension and Fiduciary PACT-Act Subpage
 |  |
| References * References, when used properly, can:
	+ Improve quality of work
	+ Increase timeliness
	+ Provide job satisfaction
	+ Reduce stress
	+ Provide promotion potential
	+ Help Veterans
	+ Substantiate administrative decisions and determinations that affect a Veteran’s case
 |  |
| Group Activity—Seek and Find* Instructions:
	+ Work in groups of two
	+ Complete Part B of Appendix A: Phase 3 Worksheet
	+ Use the **VBA Intranet and Pension Home Page** and **Common VA References** job aids
	+ Work to find answers regarding the pension website and common VA references.
	+ Be prepared to share your finished activity with other trainees.
* Time allowed: 10 minutes
	+ Note: Not all questions may be answered in the allotted time
 |  |
| Group Activity—Seek and Find Answers (1 of 5) 1. What regulation of the Title 38 Code of Regulation (CFR) contains information on marriage dates?

 1. What section of the Pension and Fiduciary Service Home Page includes a link to disability examination worksheets?
2. What is the email address for Pension and Fiduciary’s Policy and Procedures Inquiries?
 |  |
| Group Activity—Seek and Find Answers (2 of 5)1. The Veteran served in active duty February 21, 1965, through March 3, 1973. What is the name of the wartime period for this Veteran?
2. Where would you go to download VA Form 21P-5427? What is the name on the form?
 |  |
| Group Activity—Seek and Find Answers (3 of 5) 1. List at least three regulations and/or references where you would find information on age requirements of a child.
 |  |
| Group Activity—Seek and Find Answers (4 of 5)1. What reference would you use to learn more about end product codes and work-rate standards for quantitative measurements? Provide the online location you used to find the reference.
 |  |
| Group Activity—Seek and Find Answers (5 of 5) 1. What job aid would you use for examples of when and how effective dates are applied to PACT Act related accrued/substitution claims?
 |  |
| Overview of Pension Systems and Applications* All claims require systems to process
* You will use systems to:
	+ Initiate claims
	+ Develop evidence for claims
	+ Promulgate the awards for claims
	+ Notify the claimant of actions taken on the claim
* Multiple systems with specific purposes, some with over lapping purposes
* 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
 |  |
| Overview of Pension Systems and Applications Objectives* Navigate VBA intranet and pension Home pages.
* 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.
 |  |
| Class Activity—Trivia* Instructions:
	+ Divide class into two groups (Group A and B)
	+ Group A will be using Part C of Appendix A: Phase 3 Worksheet to provide the definition and check the answer
	+ Group B will be using the **Pension Systems and Applications** job aid to look up the definition and write the correct system and application on the whiteboard/flip chart
* Time allowed: 10 minutes
 |  |
| Class Activity—Trivia Answers (1 of 3)1. This program is used to store Federal Tax Information (FTI).
2. A PMC VSR uses this system to request verification of service as well as service treatment records for Veterans discharged before certain dates.
3. This application allows users to inquire against legacy information such as BIRLS, COVERS, and other agencies’ information.
 |  |
| Class Activity—Trivia Answers (2 of 3)1. A PMC VSR uses this system to generate awards for beneficiaries.
2. This program is used to send outbound correspondence addressed to claimants and representatives.
3. A PMC VSR uses this system to review claimant’s record for potential debts owed to VAMC.
4. A PMC VSR uses this system to request verification of personnel records after specific dates of discharge.

  |  |
| Class Activity—Trivia Answers (3 of 3)1. A PMC VSR uses this application to create development letters to the Veteran or claimant requesting additional information needed to process the pending claim.
2. This system is used to establish all supplemental claims.
3. This system is used to review the Veteran’s eFolder and insert documents into the electronic file.
4. *The system* all claims processors must use when reviewing and processing certain service-connected claims that may be subject to a TERA
 |  |
| Curriculum OverviewPhase 2 is used to orient all new hires with their roles and responsibilities as VSRs, as well as to present an overview of the topics covered, the required training hours, and information regarding Level 2 Assessments, which are used to assist in equipping new hires with the knowledge and skills needed to effectively complete daily job functions. |  |
| Group Activity: Curriculum Overview – Name that Phase* Instructions:
	+ Work in groups of four.
	+ Complete Part D of Appendix A: Phase 3 Worksheet.
	+ Use the Curriculum Guide Learning Aid.
	+ Work to associate each item given with the correct phase.
	+ Be prepared to share your finished activity with other trainees.
* Time allowed: 10 minutes
 |  |
| Group Activity: Name that Phase!1. I am the phase in which you would find material that familiarizes you with roles, responsibilities, and operations:
2. Phase 1
3. Phases 2 and 3
4. Phase 5 and 6
5. \_\_\_\_\_\_\_is more foundational in which the focus is on initial screening, the end products you will use, the importance of understanding the date of claim, and establishing claims
	1. Phase 3
	2. Phase 4
	3. Phase 5
6. This phase expands the trainees’ skill levels by introducing them to more complex subject matters and advanced techniques.
	1. Phase 4 and 5
	2. Phase 5.1a-5.6
	3. Phase 3, 4 and 5
7. I am the phase that helps the trainee become more proficient via on-the-job training.
	1. Phase 4
	2. Phase 2
	3. Phase 6
8. \_\_\_\_\_\_ is used to identify and ensure an understanding of fundamental concepts and skills.
	1. Phase 1-4
	2. Phase 5-6
	3. Phase 6
 |  |
| Identifying Core Values and Characteristics* Phases 1-2 –
	+ The Core Values are the basic elements of how we go about our work – they define “who we are” – and form the underlying principles we will use every day in our service to Veterans. The Core Characteristics define “what we stand for” and what we strive to be as an organization
 |  |
| Group Activity: Identifying Core Values and Characteristics* Instructions:
	+ Divide the class into two groups.
	+ Complete Part E of Appendix A: Phase 3 Worksheet.
	+ Use the VA Core Values and Characteristics Quick Reference.
	+ Group 1 will share their answers for the first 4 questions and Group 2 will determine if the answers are correct.
	+ Group 2 will share their answers for the second set of questions, and Group 1 will determine if the answers provided are correct
* Time allowed: 10 minutes
 |  |
| Group Activity: Identifying Core Values and Characteristics (Answers)1. Thoughtful and decisive in leadership, accountable for my actions
2. Fulfill my individual responsibilities and organizational responsibilities.
3. Strive for the highest quality and continuous improvement.
4. Maintain the trust and confidence of all with whom I engage.
5. Treat all those I serve and with whom I work with dignity and respect.
6. Adhere to the highest professional standards.
7. Be driven by an earnest belief in VA’s mission.
8. Be Veteran-centric
 |  |
| **What’s Next?*** TMS Evaluation: 4408379
* Phase 3: PMC VSR Resources Knowledge Enhancer
 |  |