Pension and fiduciary service

PMC VSR Advanced Core Course

Phase 5: Stages of a Claim

Part 3: Promulgate Non-Rating or Rating Decision

Phase 5, Part 3 Knowledge Check Preparation

Trainee Guide

May 2022

Phase 5, Part 3 Knowledge Check Preparation

Lesson Overview

| Topic | Description |
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| Time Estimate: | 1.5 hours |
| Purpose of the Knowledge Check Preparation: | This knowledge check preparation is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this knowledge check preparation is to get PMC VSRs ready to take the Phase 5, Part 3 Knowledge Check.  |
| Prerequisite Training Requirements: | Prior to taking the Phase 5, Part 3 Knowledge Check Preparation, trainees must complete the PMC VSR Core Course Phases 1–4 and Phase 5, Parts 1 and 2.  |
| Target Audience: | This knowledge check preparation is for entry-level PMC VSRs. |
| References: | * Compensation and Pension Knowledge Management (CPKM)
* 38 CFR 3.106 (Renouncement)
* M21-1 X.iv.4.1 (General Information About Renouncement)
* M21-1 X.iv.4.3.c (System Entries for Discontinuing an Award)
* M21-1 VI.i.1.A.2.c (Award Processing Responsibilities)
* M21-1 VI.i.1.A.1.b. (Responsibility for Awarding or Denying Benefits)
* M21-1 V.iv.1.E.1.a (Review of Rating Decisions)
* M21-1 VI.i.1.A. (Decision Authorization)
* M21-1 VI.i.1.A.2 (General Information on Processing Decisions)
* M21-1 VI.i.1.A.3.a (Definition: Denial)
* M21-1 VI.i.1.A.3 (General Information on Denials)
* M21-1 VI.i.1.A.4 (Denials Based on a Claimant’s Failure to Furnish Requested Evidence)
* M21-1 VI.i.1.B (Decision Notices)
* **Annotate the Award Checklist** job aid
* **Confirm Accuracy of a Rating Decision** job aid
* **Initial Year** job aid
* **Pension Systems and Applications** job aid
* **Processing an Award Adjustment** job aid
* **Processing an Award Renouncement** job aid
* **Processing a Denial of Benefits** job aid
* **Processing a Grant of Benefits** job aid
* **Ready to Rate** job aid
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| Technical Competencies: | * Processing Claims (PMC VSR)
* Special Monthly Pension (SMP) Processing
* VBA Applications (PMC VSR)
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| Knowledge Check: | Phase 5, Part 3 Promulgate Non-Rating or Rating Decision Knowledge Check |
| What You Need: | * Access to CPKM
* Access to the following job aids from VSR Assistant:
	+ **Annotate the Award Checklist** job aid
	+ **Confirm Accuracy of a Rating Decision** job aid
	+ **Initial Year** job aid
	+ **Pension Systems and Applications** job aid
	+ **Processing an Award Adjustment** job aid
	+ **Processing an Award Renouncement** job aid
	+ **Processing a Denial of Benefits** job aid
	+ **Processing a Grant of Benefits** job aid
	+ **Ready to Rate** job aid
* Appendix A: Example Claim
* Appendix B: Phase 5, Part 3 Worksheet
* Appendix C: Question and Answer Worksheet
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| PowerPoint Slides | Notes |
| --- | --- |
| Phase 5, Part 3: Knowledge Check Preparation |  |
| Why It Matters!The Knowledge Check Preparation course is important because PMC VSRs review and determine if the claim contains the information and evidence needed to determine eligibility for benefits and properly processing claims. |  |
| Knowledge Check Preparation Overview**This preparation will consist of the following:*** **Lesson objectives review**
* **Partner activities**
* **Question/answer forum**
 |  |
| ****Phase 5 Part 3 Lessons**** **Phase 5 Part 3 consists of two lessons: Confirm Accuracy of Rating Decision Overview of the Award Process**  |  |
| Confirm Accuracy of Rating Decision* Ensure effective date is correct
* Ensure information is technically accurate
* Send back to RVSR for correction
* Update Suspense reason
 |  |
| Confirm Accuracy of Rating Decision Objectives* Confirm accuracy of a rating decision
* Confirm effective date is correct
* Confirm information in rating decision is technically accurate
* **Complete request for corrected rating**
 |  |
| Accuracy of Rating Decision Question Writing Opportunity* Instructions:
	+ Use Appendix C: Question and Answer Worksheet to write any questions regarding accuracy of rating decision
	+ Questions will be answered at the end of this preparation
* Time allowed: 5 minutes
 |  |
| Partner Activity—Rating Decision* Instructions:
	+ Divide into pairs.
	+ Review Appendix A: Example Claim.
	+ Complete Part A of Appendix B: Phase 5, Part 3 Worksheet.
	+ Use the job aids listed in the Part A to help answer the questions.
	+ Be prepared to share your finished activity with the class.
* Time allowed: 20 minutes
 |  |
| Partner Activity—Rating Decision Answers1. What issues were sent to the RVSR for a rating decision?
2. What were the final decision(s) determined by the rater.
3. List any errors that need to be addressed and provide your rationale for the error.
 |  |
| Overview of the Award ProcessWhiteboard with the following bullet points listed: A single claim may include a combination of grant or denial decisions Granting and denying benefits are processed on original claims, new, and reopened claims. An award adjustment and award renouncement are processed on running awards |  |
| Overview of the Award Process Objectives * Describe how to prepare an award action
* Describe the responsibilities on award action for all decisions
* Describe the common steps for processing a grant of benefits
* Describe the common steps for processing a denial of benefits
* Describe the common steps for processing an award adjustment
* Describe the common steps for processing a renouncement
 |  |
| Overview of the Award Process Question Writing Opportunity* Instructions:
	+ Use Appendix C: Question and Answer Worksheet to write any questions regarding processing an award action.
	+ Questions will be answered at the end of this preparation.
* Time allowed: 5 minutes
 |  |
| Partner Activity— What’s the Award Action * Instructions:
	+ Divide into pairs.
	+ Review example claim in Appendix A: Example Claim.
	+ Complete Part B of Appendix B: Phase 5, Part 3 Worksheet.
	+ Use the job aids in Part B to help answer the questions.
	+ Be prepared to share your finished activity with the class.
* Time allowed: 20 minutes
 |  |
| Partner Activity—What’s the Award Action Answers (1 of 2)1. What are the decisions that need to be processed for an award action?
 |  |
| Partner Activity—What’s the Award Action Answers (2 of 2)1. For each decision listed in question 1, choose whether the award action is a grant or denial of benefit.
 |  |
| **Question and Answer Forum*** Instructions:
	+ Divide into groups of three or four.
	+ Review the Appendix C: Question and Answer Worksheet with your group.
	+ Mark any questions that need further clarification from the instructor.
* Time allowed: 10–15 minutes
 |  |
| Question and Answer ClarificationThis icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. |  |
| What’s Next* Complete TMS Evaluation Confirm Accuracy of Rating Decision using (TMS# 4408486)​
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