



## PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course  
Phase 5: Stages of a Claim  
Part 5: Award Adjustments

# **Phase 5, Part 5a Knowledge Check Preparation**

## Trainee Guide

May 18, 2017

Version 1.0

**Phase 5 Part 5a Knowledge Check Preparation  
Trainee Guide**

**Phase 5, Part 5a Knowledge Check Preparation**

**Lesson Overview**

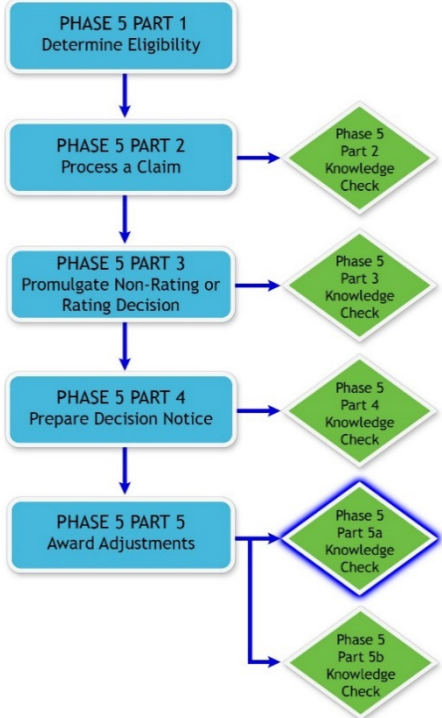
Topic	Description
Time Estimate:	1.5 hours
Purpose of the Knowledge Check Preparation:	This knowledge check preparation is part of the entry-level course for PMC VSRs. The purpose of this knowledge-check preparation is to provide you with an opportunity to review, practice, and ask questions regarding what you have learned during Phase 5, Part 5a, so that you are better prepared for the knowledge check.
Prerequisite Training Requirements:	Prior to taking the Phase 5, Part 5a Knowledge Check Preparation, you must complete PMC VSR Core Course Phases 1–4 and Phase 5, Parts 1–4, and Part 5 lessons 1-3. Refer to the <b>Master Course Map</b> learning aid for a list of lessons.
Target Audience:	This knowledge check preparation is for entry-level PMC VSRs.
References	<ul style="list-style-type: none"> <li>• <b>Master Course Map</b> learning aid</li> <li>• Compensation and Pension Knowledge Management (CPKM)</li> <li>• See <i>Appendix A</i> for references introduced in earlier lessons</li> </ul>
Technical Competencies:	<ul style="list-style-type: none"> <li>• Program Benefits and Eligibility (PMC VSR)</li> <li>• Processing Claims (PMC VSR)</li> <li>• Special Monthly Pension (SMP) Processing</li> <li>• VBA Applications (PMC VSR)</li> <li>• Income Counting and Net Worth</li> </ul>
Knowledge Check:	Phase 5, Part 5a: Award Adjustments Knowledge Check

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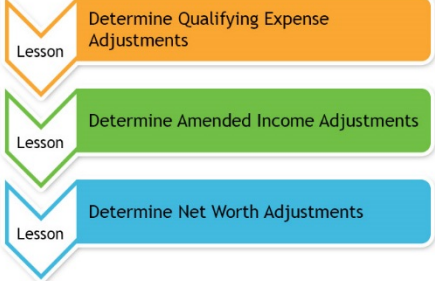

Topic	Description
What You Need:	<ul style="list-style-type: none"> <li>• Trainee Guide</li> <li>• <b>Master Course Map</b> learning aid</li> <li>• Access to CPKM</li> <li>• Access to VSR Assistant for job aids</li> <li>• Appendix A: Knowledge Check Preparation References</li> <li>• Appendix B: Example Claim</li> <li>• Appendix C: Phase 5, Part 5 Worksheet</li> <li>• Appendix D: Question and Answer Worksheet</li> <li>• Calculator</li> </ul>

PowerPoint Slides	Notes
<p><b>Phase 5, Part 5a Knowledge Check Preparation</b></p>	
<p><b>You Are Here</b></p>	
<p><b>Why It Matters!</b></p> <p>Preparing an award adjustment involves reviewing any additional information provided by the claimant or third party, and deciding the reason for adjustment.</p>	

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PowerPoint Slides	Notes
<p><b>Knowledge Check</b></p>  <pre> graph TD     P1[PHASE 5 PART 1 Determine Eligibility] --&gt; P2[PHASE 5 PART 2 Process a Claim]     P2 --&gt; KC2{Phase 5 Part 2 Knowledge Check}     P2 --&gt; P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision]     P3 --&gt; KC3{Phase 5 Part 3 Knowledge Check}     P3 --&gt; P4[PHASE 5 PART 4 Prepare Decision Notice]     P4 --&gt; KC4{Phase 5 Part 4 Knowledge Check}     P4 --&gt; P5[PHASE 5 PART 5 Award Adjustments]     P5 --&gt; KC5a{Phase 5 Part 5a Knowledge Check}     P5 --&gt; KC5b{Phase 5 Part 5b Knowledge Check}     style KC5a stroke:#0000ff,stroke-width:2px     style KC5b stroke:#0000ff,stroke-width:2px             </pre> <p>The flowchart illustrates the Phase 5 process. It starts with 'PHASE 5 PART 1 Determine Eligibility', followed by 'PHASE 5 PART 2 Process a Claim', 'PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision', 'PHASE 5 PART 4 Prepare Decision Notice', and 'PHASE 5 PART 5 Award Adjustments'. Knowledge checks are integrated at various stages: 'Phase 5 Part 2 Knowledge Check' after Part 2, 'Phase 5 Part 3 Knowledge Check' after Part 3, 'Phase 5 Part 4 Knowledge Check' after Part 4, and 'Phase 5 Part 5a Knowledge Check' and 'Phase 5 Part 5b Knowledge Check' after Part 5. The 'Phase 5 Part 5a Knowledge Check' is highlighted with a thick blue border.</p>	
<p><b>Knowledge Check Preparation Overview</b></p> <p>This preparation will consist of the following:</p> <ul style="list-style-type: none"> <li>• Lesson objectives review</li> <li>• Partner activities</li> <li>• Question/answer forum</li> </ul>	

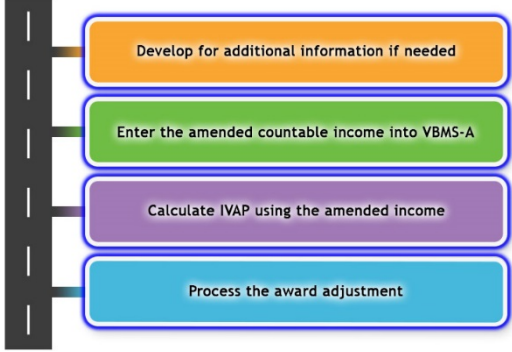
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PowerPoint Slides	Notes
<p><b>Phase 5, Part 5a Lessons</b></p>  <p>The image shows three lesson cards stacked vertically. Each card has a colored arrow pointing right and the word 'Lesson' in a small box on the left. The top card is orange and says 'Determine Qualifying Expense Adjustments'. The middle card is green and says 'Determine Amended Income Adjustments'. The bottom card is blue and says 'Determine Net Worth Adjustments'.</p>	
<p><b>Determine Qualifying Expense Adjustments</b></p>  <p>The image shows a traffic light graphic with three horizontal arrows pointing right. The top arrow is green with a white right-pointing arrow and says 'Enter Qualifying Expense'. The middle arrow is yellow with a white exclamation mark and says 'Develop for the Expense'. The bottom arrow is red with a white hand icon and says 'Deny the Expense'.</p>	

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<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Determine Qualifying Expense Adjustments Objectives</b></p> <p>Determine qualifying expense adjustments.</p> <ul style="list-style-type: none"><li>• Determine whether medical expense qualifies for an award adjustment.</li><li>• Determine whether final expense qualifies for an award adjustment.</li><li>• Determine whether educational expense qualifies for an award adjustment.</li></ul>	
<p><b>Qualifying Expense Adjustments Question Writing Opportunity</b></p> <ul style="list-style-type: none"><li>• Instructions:<ul style="list-style-type: none"><li>○ Use Appendix D: Question and Answer Worksheet to write any questions regarding qualifying expense adjustments.</li><li>○ Questions will be answered at the end of this preparation.</li></ul></li><li>• Time allowed: 5 minutes</li></ul>	

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PowerPoint Slides	Notes
<p><b>Determine Amended Income Adjustments</b></p>  <pre>graph TD; A[Develop for additional information if needed] --&gt; B[Enter the amended countable income into VBMS-A]; B --&gt; C[Calculate IVAP using the amended income]; C --&gt; D[Process the award adjustment];</pre>	
<p><b>Determine Amended Income Adjustments Objectives</b></p> <p>Determine award adjustment based on amended income.</p> <ul style="list-style-type: none"><li>• Determine whether income type is countable.</li><li>• Determine whether to develop for amended income information.</li><li>• Determine whether amended income information is received within the time limit.</li><li>• Determine whether amended income qualifies for an award adjustment.</li></ul>	

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<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Amended Income Adjustments Question Writing Opportunity</b></p> <ul style="list-style-type: none"><li>• Instructions:<ul style="list-style-type: none"><li>○ Use Appendix D: Question and Answer Worksheet to write any questions regarding processing an award action.</li><li>○ Questions will be answered at the end of this preparation.</li></ul></li><li>• Time allowed: 5 minutes</li></ul>	
<p><b>Determine Net Worth Adjustments</b></p> <ul style="list-style-type: none"><li>• Once the amended net worth has been calculated, then the award adjustment for net worth may result in one of the following two outcomes:<ul style="list-style-type: none"><li>○ Update the VBMS-A with amended net worth amount</li><li>○ A termination of benefits</li></ul></li><li>• An administrative decision for net worth determines if the net worth is a bar to benefits</li></ul>	



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<b>PowerPoint Slides</b>	<b>Notes</b>
<p><b>Determine Net Worth Adjustments Objectives</b></p> <p>Determine award adjustment based on changes to net worth.</p> <ul style="list-style-type: none"><li>• Determine whether amended net worth is an inclusion or an exclusion.</li><li>• Determine whether a net worth determination is required.</li><li>• Determine whether to develop for additional net worth information.</li><li>• Determine whether net worth is a bar to benefits.</li></ul>	
<p><b>Net Worth Adjustments Question Writing Opportunity</b></p> <ul style="list-style-type: none"><li>• Instructions:<ul style="list-style-type: none"><li>○ Use Appendix D: Question and Answer Worksheet to write any questions regarding net worth adjustments.</li><li>○ Questions will be answered at the end of this preparation.</li></ul></li><li>• Time allowed: 5 minutes</li></ul>	

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PowerPoint Slides	Notes
<p><b>Partner Activity—Award Adjustment</b></p> <ul style="list-style-type: none"> <li>• Instructions:               <ul style="list-style-type: none"> <li>○ Find a partner.</li> <li>○ Review example claim in Appendix B: Example Claim.</li> <li>○ Answer the questions listed in Appendix C: Phase 5, Part 5a Worksheet.</li> <li>○ Use the job aids listed in Appendix A.</li> <li>○ Be prepared to share your finished activity with the class.</li> </ul> </li> <li>• Time allowed: 25-30 minutes</li> </ul>	
<p><b>Partner Activity—Award Adjustment Answers (1 of 3)</b></p>	

*Medical Expenses Answers*

Description	Amount Paid	Date Paid	Provider	Paid For	UME or CME?

PowerPoint Slides	Notes
<p><b>Partner Activity—Award Adjustment Answers (2 of 3)</b></p>	
<p><b>Partner Activity—Award Adjustment Answers (3 of 3)</b></p>	

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PowerPoint Slides	Notes
<p><b>Question and Answer Forum</b></p> <ul style="list-style-type: none"><li>• Instructions:<ul style="list-style-type: none"><li>○ Divide into groups of three or four.</li><li>○ Review the Appendix D: Question and Answer Worksheet with your group.</li><li>○ Mark any questions that need further clarification from the instructor.</li><li>○ Be prepared to share your answers with the class.</li></ul></li><li>• Time allowed: 10–15 minutes</li></ul>	
<p><b>Question and Answer Clarification</b></p> 	
<p><b>What's Next</b></p> <p>Phase 5, Part 5a: Award Adjustments Knowledge Check</p>	