



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 3 PMC VSR Resources

Lesson 4: Pension EPSS

Lesson Plan

October 28, 2016

Version 1.0

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Lesson Plan

Pension EPSS

Lesson Overview

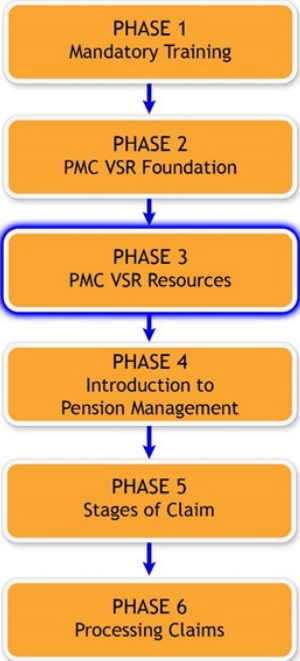

Topic	Description
Time Estimate:	30 minutes
Purpose of the Lesson:	The purpose of this lesson is to prepare PMC VSRs to locate and use the appropriate Electronic Performance Support System (EPSS) from the VSR Assistant.
Prerequisite Training Requirements:	Prior to taking the Pension EPSS lesson, trainees must complete: PMC VSR Core Course Phases 1–2 and Phase 3 Lessons: <ul style="list-style-type: none"> • 1: VA Terminology • 2: VBA Intranet Resources for the PMC VSR • 3: References (Manuals, CFR, Fast Letters)
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> • Master Course Map learning aid • VSR Assistant
Knowledge Check:	Phase 3: PMC VSR Resources Knowledge Check
Technical Competencies:	VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> • Locate information in EPSS <ul style="list-style-type: none"> ○ Define the purpose of an EPSS ○ Select the appropriate EPSS ○ Locate the appropriate EPSS ○ Navigate the EPSS

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Topic	Description
What You Need:	<ul style="list-style-type: none"> • Lesson plan • Master Course Map learning aid • Slides • Projector • Access to VBA intranet

Instructor Notes

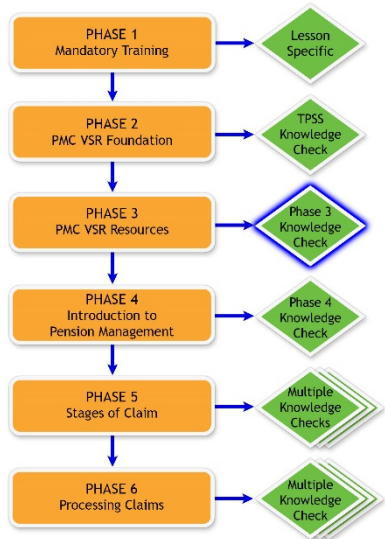

The purpose of this lesson is to prepare PMC VSRs to locate and use the appropriate EPSS from the VSR Assistant.

PowerPoint Slides	Instructor Activities
<p>Lesson 4: Pension EPSS</p>	<p>DISPLAY slide</p> <p>1. "Lesson 4: Pension EPSS"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<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] style P3 stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide</p> <p>2. "You Are Here"</p>  <p>REFER to the Master Course Map learning aid in the Trainee Guide.</p> <p>EXPLAIN that trainees are now in Lesson 4 of Phase 3, PMC VSR Resources, of the PMC Core Course. They should have completed the following three lessons from Phase 3:</p> <ul style="list-style-type: none"> • VA Terminology • Pension Website • References <p>EXPLAIN that this lesson will introduce trainees to the EPSSs they will use as PMC VSRs. Trainees will locate and use the EPSSs they need on the job.</p>


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PowerPoint Slides	Instructor Activities
<p>Why It Matters!</p> <ul style="list-style-type: none"> An Electronic Performance Support System (EPSS) provides step-by-step guidance for performing complex and/or infrequently performed tasks. Use of EPSSs reduces errors. 	<p>DISPLAY slide 3. "Why It Matters!"</p>  <p>ASK trainees if they have ever used an electronic help tool in software.</p> <p>ASK trainees if they have ever used tax-preparation software?</p> <p>ASK trainees if they have used navigation tools like GPSs or map applications on their phones to find the way to a new destination.</p> <p>EXPLAIN that these are examples of different forms of Electronic Performance Support Systems or EPSSs. EPSSs help you to perform new, difficult, and infrequent tasks.</p> <p>NOTE the difference between a job aid and an EPSS is that a job aid usually provides useful information about a portion of a task, whereas an EPSS provides step by step guidance on an entire task.</p>
<p>Technical Competency</p> <ul style="list-style-type: none"> VBA Applications (PMC VSR) 	<p>DISPLAY slide 4. "Technical Competencies"</p> <p>REVIEW the technical competency with the trainees.</p>

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PowerPoint Slides	Instructor Activities
<p>Objectives</p> <ul style="list-style-type: none"> • Locate information in EPSS. <ul style="list-style-type: none"> ○ Define the purpose of an EPSS. ○ Select the appropriate EPSS. ○ Locate the appropriate EPSS. ○ Navigate the EPSS. 	<p>DISPLAY slide 5. "Objectives"</p> <p>PRESENT the objectives for the lesson.</p>
<p>Knowledge Check</p>  <pre> graph TD P1[PHASE 1 Mandatory Training] --> K1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> K2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> K3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> K4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> K5{Multiple Knowledge Checks} P5 --> P6[PHASE 6 Processing Claims] P6 --> K6{Multiple Knowledge Checks} </pre>	<p>DISPLAY slide 6. "Knowledge Check"</p> <p>EXPLAIN that this lesson will be tested in the Phase 3 Knowledge Check.</p>  <p>REFER to the Master Course Map learning aid, <i>Lessons by Phase</i> section, to review the lessons included within the Knowledge Check.</p>

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PowerPoint Slides	Instructor Activities
<p>What is an EPSS?</p> <ul style="list-style-type: none"> • An EPSS is a tool that: <ul style="list-style-type: none"> ○ Is easily accessible online ○ Provides step-by-step guidance ○ Supports claim processing and decision making ○ Contains tutorials ○ Includes links to references and forms 	<p>DISPLAY slide</p> <p>7. "What is an EPSS?"</p> <p>EXPLAIN the purpose of the EPSSs that PMC VSRs use while processing claims.</p>
<p>EPSSs for the PMC VSR</p> 	<p>DISPLAY slide</p> <p>8. "EPSSs for the PMC VSR"</p> <p>EXPLAIN that EPSSs relevant to a novice PMC VSR include:</p> <ul style="list-style-type: none"> • Income/Net Worth • Effective Dates • Due Process • Incompetency • Character of Discharge (COD) Determination • Hospital Adjustments • PMC VSR Job Aids, located in the VSR Assistant from the PMC VSR button <p>NOTE the other EPSSs displayed are for VSRs in Compensation service.</p> <p>DEMONSTRATE where to locate the VSR Assistant EPSS portal from the VBA Intranet.</p> <p>DIRECT the trainees to do the same on their computers. Assist trainees who have difficulty.</p>

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PowerPoint Slides	Instructor Activities
<p>Selecting an EPSS</p> <ul style="list-style-type: none"> You may use more than one EPSS to complete a claim Select EPSSs based on the decisions you need to make 	<p>DISPLAY slide 9. "Selecting EPSS"</p> <p>EXPLAIN that each EPSS supports performance of a different action or actions in claim processing. VSRs may use one or more EPSS to complete a claim, depending on the type of claim and the characteristics of the claim.</p>


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PowerPoint Slides	Instructor Activities
<p>Example 1</p> <p>Determine the effective date for a claim for an original survivors (death) pension award.</p>	<p>DISPLAY slide 10. "Example 1"</p> <p>READ the example on the slide aloud.</p> <p>DEMONSTRATE using the Effective Dates EPSS to find the instructions for making the determination.</p> <ol style="list-style-type: none">1. Navigate to the VSR Assistant from the VBA Internet.2. Select Effective Dates EPSS.3. Select Death Pension.4. Select Original Death Pension Award. <p>SHOW the instructions available in the EPSS for helping to make the determination.</p> <p>INFORM trainees that death pension claims are now referred to as survivors pension.</p>

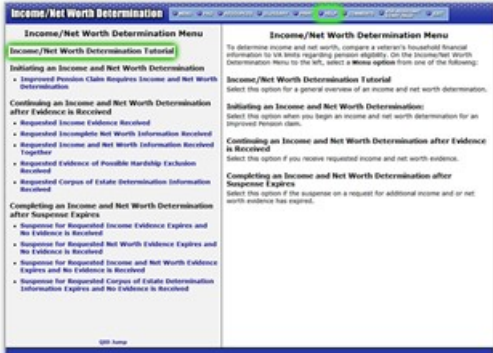
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PowerPoint Slides	Instructor Activities
<p>Example 2</p> <p>Determine due process requirements for initiating due process for information received from a third party.</p>	<p>DISPLAY slide 11. "Example 2"</p> <p>READ the second example aloud.</p> <p></p> <p>ASK trainees which EPSS to use to find the instruction to make the determination.</p> <p><i>Due Process EPSS</i></p> <p>DEMONSTRATE using the Due Process EPSS to find the instructions for making the determination.</p> <ol style="list-style-type: none">1. Navigate to the VSR Assistant from the VBA Internet.2. Select Due Process EPSS.3. Ask trainees what the next selection should be.<ul style="list-style-type: none">o <i>Start Due Process</i>4. Select Start Due process.5. Ask trainees what the next selection should be.<ul style="list-style-type: none">o <i>Third Party Information</i>6. Select Third Party Information.7. Show the instructions available in the EPSS for helping to make the determination. Point out the additional questions on the left side for drilling down for more information.

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<p>Example 3</p> <p>Calculate if income is within limits when requested income evidence is received.</p>	<p>DISPLAY slide 12. "Example 3"</p> <p>READ the third example aloud.</p> <p></p> <p>ASK trainees which EPSS to use to find the instruction to make the determination.</p> <p><i>Income and Net Worth Determination EPSS</i></p> <p>SELECT a volunteer to come up and find the instructions in the EPSS for making the determination. Encourage the other trainees to help.</p> <ol style="list-style-type: none"><i>1. Navigate to the VSR Assistant from the VBA Internet.</i><i>2. Select Income and Net Worth Determination EPSS.</i><i>3. Select Requested Income Evidence is Received.</i> <p>SHOW the information and instructions on the right side that help the PMC VSR to make the determination.</p>

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PowerPoint Slides	Instructor Activities
<p data-bbox="159 296 428 327">Navigating EPSS</p> 	<p data-bbox="699 296 927 327">DISPLAY slide</p> <p data-bbox="699 338 1032 369">13. "Navigating EPSS"</p> <p data-bbox="699 390 1419 506">OPEN the Income and Net Worth Determination EPSS. Point out the tutorial link at the top of the left column.</p> <p data-bbox="699 527 1065 558">SELECT the tutorial link.</p> <p data-bbox="699 579 1451 695">EXPLAIN that many of the EPSSs include a brief tutorial, sometimes titled Overview, explaining the task and providing references.</p> <p data-bbox="699 716 1455 873">SHOW where to access the Help feature from within the Income and Net Worth Determination EPSS. Then show where to access it from the main VSR Assistant page.</p> <p data-bbox="699 894 1292 926">DIRECT trainees to take 10 minutes to:</p> <ul data-bbox="699 957 1203 1094" style="list-style-type: none">• Read through the Help screens• Locate the glossary• Locate the resources

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Income/Net Worth Determination MENU FAQ RESOURCES GLOSSARY PRINT **HELP** COMMENTS VSR ASSISTANT START PAGE EXIT

Income/Net Worth Determination Menu

Income/Net Worth Determination Tutorial

Initiating an Income and Net Worth Determination

- Improved Pension Claim Requires Income and Net Worth Determination

Continuing an Income and Net Worth Determination after Evidence is Received

- Requested Income Evidence Received
- Requested Incomplete Net Worth Information Received
- Requested Income and Net Worth Information Received Together
- Requested Evidence of Possible Hardship Exclusion Received
- Requested Corpus of Estate Determination Information Received

Completing an Income and Net Worth Determination after Suspense Expires

- Suspense for Requested Income Evidence Expires and No Evidence is Received
- Suspense for Requested Net Worth Evidence Expires and No Evidence is Received
- Suspense for Requested Income and Net Worth Evidence Expires and No Evidence is Received
- Suspense for Requested Corpus of Estate Determination Information Expires and No Evidence is Received

QID Jump

Income/Net Worth Determination Menu

To determine income and net worth, compare a veteran's household financial information to VA limits regarding pension eligibility. On the Income/Net Worth Determination Menu to the left, select a **Menu option** from one of the following:

Income/Net Worth Determination Tutorial
Select this option for a general overview of an income and net worth determination.

Initiating an Income and Net Worth Determination:
Select this option when you begin an income and net worth determination for an Improved Pension claim.

Continuing an Income and Net Worth Determination after Evidence is Received
Select this option if you receive requested income and net worth evidence.

Completing an Income and Net Worth Determination after Suspense Expires
Select this option if the suspense on a request for additional income and or net worth evidence has expired.

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PowerPoint Slides	Instructor Activities
<p>Activity: Navigating EPSS</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Form small groups of two or three people ○ Read directions on the Navigating EPSS Activity ○ Complete the activity; be prepared to share your responses • Time allowed: 10 minutes 	<p>DISPLAY slide 14. "Activity: Navigating EPSS"</p> <p>DIRECT trainees to:</p> <ul style="list-style-type: none"> • Form small groups of two or three people. • Read the instructions on the worksheet. • Find and write down the answers to the questions. • Write down where they found each answer. <p>ALLOW ten minutes.</p> <p>DEBRIEF the exercise as follows:</p> <ul style="list-style-type: none"> • Ask a volunteer for the answer to a question. • Ask the volunteer to come to the front and demonstrate where in the EPSSs to find the answer. • Correct the responses as necessary, using the answer key below. • Direct the groups to grade their own worksheets. • Repeat the process for each question. • Determine which team had the most correct responses.

Navigating EPSS Activity Answer Key

Work in your small groups to find the answers to the questions below using the EPSSs. You have 10 minutes to answer the questions and document where you located the answer in the EPSS. You may be asked to give your answer and show where you found it. The team with the most correct answers wins.




1. Which of the six EPSSs for the PMC VSR include a tutorial?
 - *Incompetency EPSS (first page of this EPSS)*
 - *Income and Net Worth Determination EPSS (first page of this EPSS; it is called an overview, but it is a tutorial)*
 - *Character of Discharge EPSS (first page of this EPSS)*

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- *Effective Dates EPSS (first page of this EPSS)*
 - *Due Process EPSS (first page of this EPSS; it is called an overview, but it is a tutorial)*
2. What is the VA definition of incompetency?
 - *The VA defines a mentally incompetent person as one who, because of injury or disease, lacks the mental capacity to contract or to manage his or her affairs, including disbursement of funds without limitation. (glossary; page 2 of the tutorial in the Incompetency EPSS)*
 3. What is the CFR reference for effective dates?
 - *38 CFR 3.400 (page 1 of effective dates EPSS tutorial)*
 4. Define IVAP.
 - *Income for VA Purposes (glossary; Income and Net Worth Determination EPSS tutorial first page.)*
 5. What is the wartime period for the Vietnam era?
 - *Aug. 5, 1964 to May 7, 1975 (Feb. 28, 1961, for Veterans who served "in country" before Aug. 5, 1964) (resources; wartime periods)*
 6. What are the CFR references applied for adjusting a Veteran's benefits as he or she is readmitted into a facility?
 - *38 CFR 3.551 and 38 CFR 3.552 (Hospital Adjustments EPSS > Readmission link > first page)*

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<p>Discussion</p> <ul style="list-style-type: none"> • What are some uses for an EPSS? • Where can you find the link to the EPSSs? • Which EPSSs are most useful for the PMC VSR? • Are you comfortable using an EPSS to find information to perform a task or make a decision? • What was the most useful feature you noted in the EPSSs? 	<p>DISPLAY slide 15. "Discussion"</p> <p style="text-align: center;"></p> <p>DISCUSS the questions on the slide as a form of lesson review.</p>
<p>Questions?</p> <p style="text-align: center;"></p>	<p>DISPLAY slide 16. "Questions?"</p> <p style="text-align: center;"></p> <p>ASK trainees if they have any questions before continuing.</p>
<p>What's Next?</p> <p>Overview of Pension Systems and Applications</p>	<p>DISPLAY slide 17. "What's Next?"</p> <p>EXPLAIN that the next lesson continues Phase 3, PMC VSR Resources by introducing the various systems a PMC VSR will use.</p>