



## PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course  
Phase 3: PMC VSR Resources

# **Lesson 5: Overview of Pension Systems and Applications**

Lesson Plan

October 28, 2016

Version 1.0

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**Overview of Pension Systems and Applications**

**Lesson Overview**

Topic	Description
Time Estimate:	2 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 provide an overview of systems used by PMC VSRs to process claims.
Prerequisite Training Requirements:	Prior to taking the Overview of Pension Systems and Applications lesson, trainees must complete: <ul style="list-style-type: none"> <li>• PMC VSR Core Course Phases 1–2</li> <li>• PMC VSR Core Course Phase 3, Lessons 1–4</li> </ul>
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> <li>• <b>Master Course Map</b> learning aid</li> <li>• Software systems user manuals on the VBA intranet</li> <li>• <b>Pension Systems and Applications</b> job aid</li> </ul>
Knowledge Check:	Phase 3: PMC VSR Resources Knowledge Check
Technical Competencies:	VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> <li>• Identify the purpose of systems used to initiate, develop, and process claims</li> <li>• Locate systems used to initiate, develop, and process claims</li> <li>• Log in to systems used to initiate, develop, and process claims</li> <li>• Navigate Compensation and Pension Knowledge Management portal</li> </ul>
What You	<ul style="list-style-type: none"> <li>• Lesson plan</li> </ul>

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Need:	<ul style="list-style-type: none"> <li>• <b>Master Course Map</b> learning aid</li> <li>• Slides</li> <li>• Projector</li> <li>• TMS #3971406 Introduction to Compensation and Pension Knowledge Management (CPKM) Portal video and Adobe Flash to run it.</li> <li>• Access to VBA intranet</li> <li>• Access to the <b>Pension Systems and Applications</b> job aid from VSR Assistant</li> <li>• Access to each system: <ul style="list-style-type: none"> <li>○ CPKM</li> <li>○ SHARE</li> <li>○ Virtual VA</li> <li>○ VBMS</li> <li>○ VBMS-A</li> <li>○ MAP-D</li> <li>○ VETSNET</li> <li>○ COVERS</li> <li>○ PIES</li> <li>○ DPRIS</li> <li>○ PCGL</li> <li>○ FAS</li> <li>○ VACOLS</li> <li>○ CAPRI</li> </ul> </li> <li>• For each system listed above, knowledge of the current status of that system (e.g., Is it now obsolete? Has another system replaced it?)</li> <li>• For each trainee, log in information including user names and passwords for each system.</li> <li>• For each trainee, a computer with access to the VBA intranet</li> </ul>

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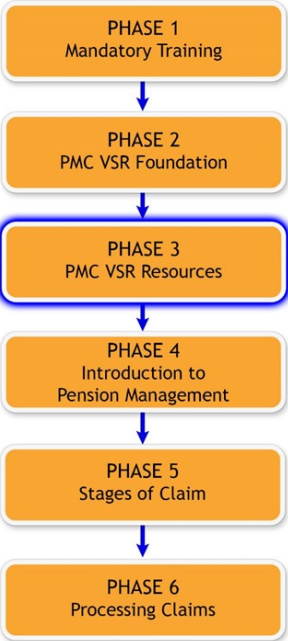

**Instructor Notes**

This lesson introduces the common systems that trainees will use as a PMC VSR and helps them to become familiar with the various systems, their uses, and current statuses of the systems. Trainees will locate and log in to each system using the PMC VSR Systems job aid, located in the VSR Assistant from the PMC VSR button, as a guide. Trainees will learn how to navigate the CPKM, as it is the primary source of reference materials for all tasks. They will learn how and when to use the other systems later in the course.

Prior to beginning this lesson, review the job aid and determine if any of the system information is outdated. Be prepared to share the updates with the students and to report the required changes to the Service to update in the job aid.

<b>PowerPoint Slides</b>	<b>Instructor Activities</b>
<b>Overview of Pension Systems and Applications</b>	<b>DISPLAY</b> slide 1. "Overview of Pension Systems and Applications" <b>INTRODUCE</b> yourself as the instructor. <b>INTRODUCE</b> the lesson.

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PowerPoint Slides	Instructor Activities
<p><b>You Are Here</b></p>  <pre>graph TD; P1[PHASE 1 Mandatory Training] --&gt; P2[PHASE 2 PMC VSR Foundation]; P2 --&gt; P3[PHASE 3 PMC VSR Resources]; P3 --&gt; P4[PHASE 4 Introduction to Pension Management]; P4 --&gt; P5[PHASE 5 Stages of Claim]; P5 --&gt; P6[PHASE 6 Processing Claims];</pre>	<p><b>DISPLAY</b> slide 2. "You Are Here"</p>  <p><b>REFER</b> to the <b>Master Course Map</b> learning aid in the Trainee Guide.</p> <p><b>EXPLAIN</b> that trainees are now in lesson 5 of Phase 3, PMC VSR Resources, of the PMC Core Course. They should have completed the following four lessons from Phase 3:</p> <ul style="list-style-type: none"><li>• VA Terminology</li><li>• Pension Website</li><li>• References</li><li>• Pension EPSS</li></ul> <p><b>EXPLAIN</b> that this lesson will introduce the common systems trainees will use as PMC VSRs and help them become familiar with the various systems and their uses.</p> <p>Trainees will locate and log in to each system using the <b>Pension Systems and Applications</b> job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>NOTE</b> that trainees will learn how and when to use each system later in the course.</p>



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PowerPoint Slides	Instructor Activities
<p><b>Why It Matters!</b></p> <ul style="list-style-type: none"> <li>• All claims require systems to process</li> <li>• You will use systems to: <ul style="list-style-type: none"> <li>○ Initiate claims</li> <li>○ Develop evidence for claims</li> <li>○ Promulgate the awards for claims</li> <li>○ Notify the claimant of actions taken on the claim</li> </ul> </li> <li>• If you don't know which system to use or how to access it, you can't do the work of the PMC VSR.</li> <li>• Not knowing the systems has a rippling effect in terms of errors. Ultimately, it is the Veteran who will be affected.</li> </ul>	<p><b>DISPLAY</b> slide <b>3.</b> "Why It Matters!"</p> <p><b>EXPLAIN</b> that the PMC VSR uses systems to accomplish all aspects of the job.</p>
<p><b>Technical Competencies</b></p> <ul style="list-style-type: none"> <li>• VBA Applications (PMC VSR)</li> </ul>	<p><b>DISPLAY</b> slide <b>4.</b> "Technical Competencies"</p> <p><b>REVIEW</b> the technical competencies with the trainees.</p>

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<p><b>Objectives</b></p> <ul style="list-style-type: none"> <li>Identify the purpose of systems used to initiate, develop, and process claims.</li> <li>Locate systems used to initiate, develop, and process claims.</li> <li>Log in to systems used to initiate, develop, and process claims.</li> <li>Navigate Compensation and Pension Knowledge Management portal.</li> </ul>	<p><b>DISPLAY</b> slide <b>5. "Objectives"</b></p> <p><b>PRESENT</b> the objectives for the lesson.</p> <p><b>EXPLAIN</b> that in this lesson trainees will learn the purpose of each system and how to locate and log in to each system.</p> <p><b>EXPLAIN</b> that they will learn to navigate and perform system tasks in the context of processing claims later in the course.</p>
<p><b>Knowledge Check</b></p> <pre> graph TD     P1[PHASE 1 Mandatory Training] --&gt; C1{Lesson Specific}     P1 --&gt; P2[PHASE 2 PMC VSR Foundation]     P2 --&gt; C2{TPSS Knowledge Check}     P2 --&gt; P3[PHASE 3 PMC VSR Resources]     P3 --&gt; C3{Phase 3 Knowledge Check}     P3 --&gt; P4[PHASE 4 Introduction to Pension Management]     P4 --&gt; C4{Phase 4 Knowledge Check}     P4 --&gt; P5[PHASE 5 Stages of Claim]     P5 --&gt; C5{Multiple Knowledge Checks}     P5 --&gt; P6[PHASE 6 Processing Claims]     P6 --&gt; C6{Multiple Knowledge Checks}     </pre>	<p><b>DISPLAY</b> slide <b>6. "Knowledge Check"</b></p> <p><b>EXPLAIN</b> that this lesson will be tested in the Phase 3 Knowledge Check.</p> <p><b>REFER</b> to the <b>Master Course Map</b> 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><b>Pension Systems and Applications Job Aid</b></p> <ul style="list-style-type: none"> <li>• Instructions <ul style="list-style-type: none"> <li>○ Access <b>Pension Systems and Applications</b> job aid, located in the VSR Assistant from the PMC VSR button</li> <li>○ Select Pension Systems and Applications</li> <li>○ Consider which systems you think you will use most frequently</li> </ul> </li> <li>• Time allowed: 10 minutes</li> </ul>	<p><b>DISPLAY</b> slide 7. "Pension Systems and Applications Job Aid"</p>  <p><b>REFER</b> trainees to the <b>Pension Systems and Applications</b> job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>DIRECT</b> trainees to read through the first column of the job aid as an introduction to the systems and how the PMC VSR uses the systems.</p> <p><b>ALLOW</b> 10 minutes to complete.</p> <p><b>EXPLAIN</b> that some of the systems are being phased out as newer systems are developed and phased in. For example, VBMS is replacing VETSNET.</p> <p><b>DISCUSS</b> which systems trainees think they will use most frequently as PMC VSRs. Explain that the systems used depend on the type of claim being worked. Tell them which systems you use most frequently.</p>
<p><b>Question 1</b></p> <p>Which system is used to update the corporate record?</p>	<p><b>DISPLAY</b> slide 8. "Question 1"</p>  <p><b>ASK</b> a trainee which system is used to update the corporate record?</p>



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<p><b>Answer: SHARE</b></p> <ul style="list-style-type: none"> <li>• <i>Allows employees to inquire against legacy information (e.g., BIRLS, BDN), as well as other agencies' information (e.g., SSA)</i></li> <li>• <i>Updates both legacy and corporate information with one transaction</i></li> <li>• <i>Is the starting point of MAP-D</i></li> </ul>	<p><b>DISPLAY</b> slide  <b>9.</b> "Answer: SHARE"</p> <p><b>REVIEW</b> the purpose of SHARE on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for SHARE listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to SHARE.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 2</b></p> <p>Which system is used to view rating decision information and payment information?</p>	<p><b>DISPLAY</b> slide  <b>10.</b> "Question 2"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used to view rating decision information and payment information?</p>


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<p><b>Answer: VETSNET</b></p> <ul style="list-style-type: none"> <li>• <i>Suite of applications with data shared and passed between the applications to support end-to-end claims processing, customer service, and notification</i></li> <li>• <i>Facilitates the entire claims process</i> <ul style="list-style-type: none"> <li>○ <i>Establish and develop Veteran claims</i></li> <li>○ <i>Document rating decision, award, and notification letter</i></li> <li>○ <i>Transmit payment information to Treasury, accomplishing the necessary accounting</i></li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>11.</b> "Answer: VETSNET"</p> <p><b>DESCRIBE</b> the purpose of VETSNET.</p> <p><b>DESCRIBE</b> the current uses for VETSNET listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to VETSNET.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 3</b></p> <p>Which system in development will eventually replace VETSNET?</p>	<p><b>DISPLAY</b> slide  <b>12.</b> "Question 3"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system in development will eventually replace VETSNET?</p>



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<p><b>Answer: VBMS</b></p> <p><i>The Veterans Benefits Management System (VBMS)</i></p> <ul style="list-style-type: none"> <li>• <i>A business transformation initiative supported by technology and designed to improve VBA service delivery</i></li> <li>• <i>Interdependent with the VETSNET Legacy system (VETSNET will be retired when VBMS is complete)</i></li> </ul>	<p><b>DISPLAY</b> slide  <b>13.</b> "Answer: VBMS"</p> <p><b>REVIEW</b> the purpose of VBMS on the job aid or summarize in your own words.</p> <p><b>EXPLAIN</b> how VBMS differs from VETSNET.</p> <p><b>DESCRIBE</b> the uses for VBMS listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to VBMS.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>VBMS-A</b></p> <p>The Veterans Benefits Management System Awards (VBMS-A) generates awards for beneficiaries.</p>	<p><b>DISPLAY</b> slide  <b>14.</b> "VBMS-A"</p> <p><b>EXPLAIN</b> the relationship of VBMS-A to VBMS. VBMS-A is a sub-system of VBMS used to view running awards and process new awards.</p> <p><b>EXPLAIN</b> that the award is processed once the PMC VSR determines the claimant's eligibility for the benefit.</p> <p><b>DESCRIBE</b> the uses for VBMS-A listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p>


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<p><b>Question 4</b></p> <p>Which system is used for preparing development letters?</p>	<p><b>DISPLAY</b> slide</p> <p><b>15.</b> "Question 4"</p>  <p><b>ASK</b> a trainee which system is used for preparing development letters?</p>
<p><b>Answer: MAP-D</b></p> <p><i>Modern Awards Processing Development (MAP-D):</i></p> <ul style="list-style-type: none"> <li>• <i>Supports development of claims, and workflow tracking</i></li> <li>• <i>Provides single processing development capability</i></li> <li>• <i>Addresses complete claims development, claims status, and case management using the best features of existing applications</i></li> <li>• <i>Provides access to those applications that support the claims development process including COVERS and PIES</i></li> <li>• <i>Offers the capability to view notes left by VA employees and add notes that can be specific to claims or general notes about the claimant and/or beneficiary</i></li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>16.</b> "Answer: MAP-D"</p> <p><b>DEFINE</b> development in the context of claims processing. Development is the part of the process where the PMC VSR collects the required information to make a determination about eligibility.</p> <p><b>REVIEW</b> the purpose of MAP-D on the job aid, located in the VSR Assistant from the PMC VSR button, or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for MAP-D listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to MAP-D.</p> <p><b>RESOLVE</b> any issues.</p>


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<p><b>Question 5</b></p> <p>Which system is used for preparing other forms of correspondence with the claimant?</p>	<p><b>DISPLAY</b> slide            17. "Question 5"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used for preparing other forms of correspondence with the claimant?</p>
<p><b>Answer: PCGL</b></p> <p><i>The Personal Computer Generated Letters (PCGL) system allows the PMC VSR to generate letters in two modes.</i></p> <ul style="list-style-type: none"> <li>• <i>Free-form mode allows you to type a letter "from scratch" or select individual paragraphs in putting together a letter.</i></li> <li>• <i>Predefined letters minimize user input and provide letter generation capabilities accessing BDN, VETSNET, and/or VBMS data.</i></li> </ul>	<p><b>DISPLAY</b> slide            18. "Answer: PCGL"</p> <p><b>REVIEW</b> the purpose of PCGL on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for PCGL listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to PCGL.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 6</b></p> <p>Which system provides PMC VSR access to a Veteran's electronic claims folder (e-folder) and eliminates the need to locate the paper file?</p>	<p><b>DISPLAY</b> slide            19. "Question"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system provides PMC VSR access to a Veteran's electronic claims folder and eliminates the need to locate the paper file?</p>


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<p><b>Answer: VVA</b></p> <p><i>Virtual VA (VVA)</i></p> <ul style="list-style-type: none"> <li>• <i>Stores the images of original documentation and facilitates the gathering of documents such as Veterans' applications, awards, SSA records, medical and dependency records</i></li> <li>• <i>Provides access to a Veteran's e-folder and eliminates the need to locate the paper files</i></li> <li>• <i>Saves time for the claimant and/or beneficiary</i></li> </ul>	<p><b>DISPLAY</b> slide <b>20.</b> "Answer: VVA"</p> <p><b>REVIEW</b> the purpose of VVA on the job aid, located in the VSR Assistant from the PMC VSR button, or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for VVA listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to VVA.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 7</b></p> <p>Which system is used to track the location of paper folders within and between offices?</p>	<p><b>DISPLAY</b> slide <b>21.</b> "Question 7"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used to track the location of paper folders within and between offices?</p>

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<p><b>Answer: <i>COVERS</i></b></p> <p><i>Control of Veterans Records System (COVERS)</i></p> <ul style="list-style-type: none"> <li>• <i>Tracks the location of paper folders within, and between offices</i></li> <li>• <i>Is updated each time a folder is received at a location</i></li> <li>• <i>Tells you if the claims folder has been electronically uploaded and a VBMS folder exists</i></li> </ul>	<p><b>DISPLAY</b> slide  <b>22.</b> "Answer: <i>COVERS</i>"</p> <p><b>REVIEW</b> the purpose of <i>COVERS</i> on the job aid, located in the VSR Assistant from the PMC VSR button, or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for <i>COVERS</i> listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to <i>COVERS</i>.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 8</b></p> <p>Which system is used to review a claimant's payment and accounting information?</p>	<p><b>DISPLAY</b> slide  <b>23.</b> "Question 8"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used to review a claimant's payment and accounting information?</p>

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<p><b>Answer: FAS</b></p> <p><i>Finance and Accounting System (FAS)</i></p> <ul style="list-style-type: none"> <li>• <i>Supports generation and audit of benefit payments</i></li> <li>• <i>Provides online transaction processing, online audit functions, and automated manual review processes</i></li> <li>• <i>Provides access to payments, accountable balance, deductions, receivables, and all transactions</i></li> </ul>	<p><b>DISPLAY</b> slide  <b>24.</b> "Answer: FAS"</p> <p><b>REVIEW</b> the purpose of FAS on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for FAS listed in job aid, located in the VSR Assistant from the PMC VSR button.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to FAS.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 9</b></p> <p>Which systems are used to verify service dates and request service treatment records?</p>	<p><b>DISPLAY</b> slide  <b>25.</b> "Question 9"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which systems are used to verify service dates and request service treatment records?</p>




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<p><b>Answer: PIES and DPRIS</b></p> <ul style="list-style-type: none"> <li>• <i>Personnel Information Exchange System (PIES) and Defense Personnel Records Information Retrieval System (DPRIS) are used to request personnel records</i></li> <li>• DPRIS is used for Veterans discharged after specific dates (see job aid, located in the VSR Assistant from the PMC VSR button)</li> </ul>	<p><b>DISPLAY</b> slide  <b>26.</b> "Answer: PIES and DPRIS"</p> <p><b>REVIEW</b> the purpose of PIES and DPRIS on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for PIES and DPRIS listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will learn about the uses of PIES and DPRIS in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to PIES using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to PIES.</p> <p><b>RESOLVE</b> any issues.</p> <p><b>EXPLAIN</b> that a designated user at each station, often referred to as a <i>super user</i>, has responsibility for accessing information in DPRIS.</p>
<p><b>Question 10</b></p> <p>Which system is used to view the status of an appeals case?</p>	<p><b>DISPLAY</b> slide  <b>27.</b> "Question 10"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used to view the status of an appeals case?</p>



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<p><b>Answer: VACOLS</b></p> <p><i>Veterans Appeals Control System (VACOLS) allows personnel to view, update, and track the status of appeals cases submitted to Board of Veterans Appeals (BVA).</i></p>	<p><b>DISPLAY</b> slide  <b>28.</b> "Answer: VACOLS"</p> <p><b>REVIEW</b> the purpose of VACOLS on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for VACOLS listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will learn how to perform these tasks in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to the system using the steps on the job aid.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to VACOLS.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Question 11</b></p> <p>Which system is used to access medical information about beneficiaries who have received care by a Veterans Affairs Medical Center (VAMC)?</p>	<p><b>DISPLAY</b> slide  <b>29.</b> "Question 11"</p> <p style="text-align: center;"></p> <p><b>ASK</b> a trainee which system is used to access medical information about beneficiaries who have received care by a Veterans Affairs Medical Center (VAMC)?</p>

**Lesson 5: Overview of Pension Systems and Applications**  
**Lesson Plan**

PowerPoint Slides	Instructor Activities
<p><b>Answer: CAPRI</b></p> <p><i>Compensation and Pension Records Interchange (CAPRI)</i></p> <ul style="list-style-type: none"> <li>• <i>Acts as a bridge between VBA and Veterans Health Administration (VHA) information systems</i></li> <li>• <i>Facilitates collecting medical information for a rating</i></li> </ul>	<p><b>DISPLAY</b> slide <b>30.</b> "Answer: CAPRI"</p> <p><b>REVIEW</b> the purpose of CAPRI on the job aid or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for CAPRI listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will learn about the uses of CAPRI in the context of processing claims later in the course.</p> <p><b>DEMONSTRATE</b> how to access and log in to CAPRI using the steps on the job aid.</p> <p><b>RESOLVE</b> any issues.</p> <p><b>EXPLAIN</b> that at some stations, designated users have responsibility for accessing information in CAPRI.</p>
<p><b>User Guides</b></p> <p>User guides for the systems are available from the VBA intranet at <a href="http://vbaw.vba.va.gov/bl/21/index.htm">vbaw.vba.va.gov/bl/21/index.htm</a></p>	<p><b>DISPLAY</b> slide <b>31.</b> "User Guides"</p>  <p><b>REFER</b> trainees to the location for the user guides on the VBA intranet at <a href="http://vbaw.vba.va.gov/bl/21/index.htm">http://vbaw.vba.va.gov/bl/21/index.htm</a></p> <p><b>REMIND</b> the trainees they learned how to use the VBA intranet in an earlier lesson.</p>

**Lesson 5: Overview of Pension Systems and Applications**  
**Lesson Plan**

PowerPoint Slides	Instructor Activities
<p><b>CPKM Video</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Launch TMS</li> <li>○ Select Introduction to Compensation and Pension Knowledge Management (CPKM) Portal</li> <li>○ Watch the video</li> <li>○ Use the steps in the job aid to access CPKM</li> </ul> </li> <li>• Time allowed: 15 minutes</li> </ul>	<p><b>DISPLAY</b> slide <b>32. "CPKM Video"</b></p> <p><b>REVIEW</b> the purpose of CPKM on the job aid, located in the VSR Assistant from the PMC VSR button, or summarize in your own words.</p> <p><b>DESCRIBE</b> the uses for CPKM listed in job aid.</p> <p><b>EXPLAIN</b> that trainees will be introduced to CPKM with a video in TMS.</p> <p><b>DIRECT</b> trainees to launch TMS, locate TMS# 3971406, and watch the video.</p> <p><b>DIRECT</b> trainees to follow the steps on the job aid to log in to CPKM.</p> <p><b>RESOLVE</b> any issues.</p>
<p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Purpose</li> <li>• Location</li> <li>• Access</li> </ul>	<p><b>DISPLAY</b> slide <b>33. "Summary"</b></p> <p><b>REVIEW</b> the purpose of this lesson was to introduce the purpose of each system and how to find each system and then provide the opportunity log in to each system.</p> <p><b>REMIND</b> trainees that they will learn to navigate and perform tasks in the systems later in the course in the context of processing claims and may continue to use the job aid throughout the training when learning to perform the tasks.</p>
<p><b>Questions?</b></p> 	<p><b>DISPLAY</b> slide <b>34. "Questions?"</b></p>  <p><b>ASK</b> trainees if they have any questions or concerns regarding providing benefit information. Use this time to clear up any confusion or misconceptions about the information presented.</p>

**Lesson 5: Overview of Pension Systems and Applications**  
**Lesson Plan**

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PowerPoint Slides	Instructor Activities
<p><b>What's Next?</b></p> <p>Phase 3: PMC VSR Resources Knowledge Check Preparation</p>	<p><b>DISPLAY</b> slide <b>35.</b> "What's Next"</p> <p><b>DISCUSS</b> the upcoming Knowledge Check preparation with trainees.</p> <p><b>EMPHASIZE</b> that they will review all previous lessons, job aids, handouts, and references before taking the Knowledge Check.</p>