



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 4: Introduction to Pension
Management

Lesson 3: Pension Claims eFolder/Records Management

Lesson Plan

October 28, 2016

Version 1.0

Lesson 3: Pension Claims eFolder/Records Management
Lesson Plan

Pension Claims eFolder/Records Management

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 introductory lesson is to introduce PMC VSRs to the structure and function of the eFolder and train them to how to update the claimant's records.
Prerequisite Training Requirements:	Prior to taking the Pension Claims eFolder/Records Management lesson, trainees must complete PMC VSR Core Course Phases 1 and 2.
Target Audience:	This lesson is for entry level PMC VSRs.
Lesson References:	<ul style="list-style-type: none"> • Master Course Map learning aid • M21-1 III (General Claims Process) • M21-1 III.ii.3.C.1 (Change of Address and Direct Deposit Processing) • M21-1 III.ii.4.D. (Lost Paper Claims Folders, Reconciliation of Duplicate Records in the Beneficiary Identification and Records Locator Subsystem (BIRLS), and Misplaced Claims Documents) • Common VA Terms job aid • Locating and Updating a Claimant Record job aid • Lost Claims Checklist job aid • Pension Systems and Applications job aid
Knowledge Check:	<ul style="list-style-type: none"> • Phase 4: Introduction to Pension Management Knowledge Check

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Topic	Description
Technical Competencies:	<ul style="list-style-type: none"> • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> • Locate information in a record • Update records when errors are identified • Address lost claims
What You Need:	<ul style="list-style-type: none"> • Lesson plan • Master Course Map learning aid • Appendix A: Pension Claims eFolder/Records Management worksheet • Slides • Projector • Access to VBA Intranet • Pen and paper or access to a whiteboard • Access to the following systems: <ul style="list-style-type: none"> ○ SHARE ○ VVA ○ MAP-D ○ COVERS ○ PIES ○ VBMS • Access to the following job aids from VSR Assistant: <ul style="list-style-type: none"> ○ Common VA Terms job aid ○ Locating and Updating a Claimant Record job aid ○ Lost Claims Checklist job aid ○ Pension Systems and Applications job aid • Access to 10–14 Academy mode mock claimant records (1-2 per system/application), to perform the following: <ul style="list-style-type: none"> ○ Change of address (SHARE)

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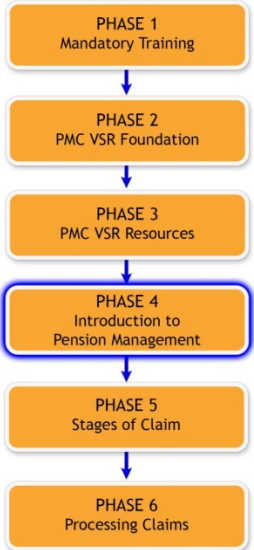
Topic	Description
	<ul style="list-style-type: none"> ○ Change of direct deposit (SHARE) ○ Add dependents (SHARE) ○ Add SSA inquiry (VVA) ○ Edit attributes of a document (VVA) ○ Update claim suspense reason (MAP-D) ○ Update claim notes (MAP-D) ○ Add date received to a tracked item (MAP-D) ○ Edit date of receipt and document type (VBMS) ○ Add claim notes (VBMS) ○ Update current physical location of a folder (COVERS) ○ Create 3101 with service information (PIES)

Instructor Notes

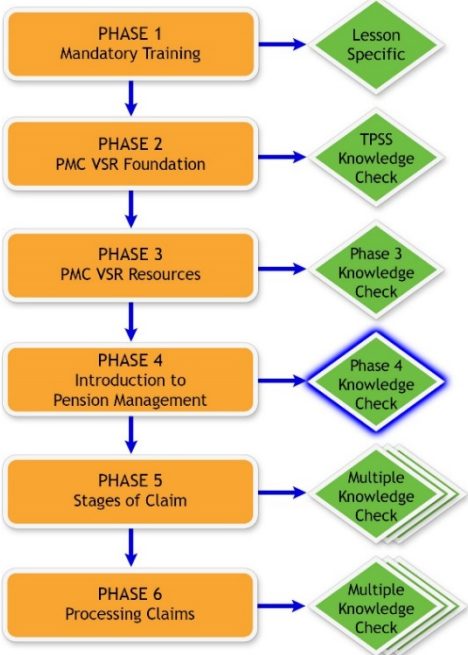

This lesson provides trainees with the process used to locate and update claimant records in the various systems and applications used in VBA. The trainees will also learn the process for addressing a lost claim.

PowerPoint Slides	Instructor Activities
<p>Lesson 3: Pension Claims eFolder/Records Management</p>	<p>DISPLAY slide</p> <p>1. "Lesson 3: Pension Claims eFolder/Records Management"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<p>You Are Here</p>	<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>DESCRIBE the diagram.</p>


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PowerPoint Slides	Instructor Activities
 <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 P4 stroke:#0000FF,stroke-width:2px </pre>	<p>EXPLAIN where the trainees are in the phase, what they have completed, and where they are headed next.</p>
<p>The Importance of Records Management</p> <ul style="list-style-type: none"> • One of your duties as a PMC VSR involves locating and updating records in the eFolder, corporate record, and claimant record. • These records must be tracked and updated to ensure that the claimant is receiving the benefits entitled and to ensure that you, the PMC VSR, have the evidence needed to justify claim decisions. 	<p>DISPLAY slide 3. "The Importance of Records Management"</p> <p>EXPLAIN to trainees that the eFolder, corporate record, and claimant record will be discussed in more detail later in the lesson.</p> <p>EMPHASIZE to trainees that maintaining claimant records is a crucial part of the job as the claimant record is used to justify claim decisions and determine claimant benefits.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) 	<p>DISPLAY slide 4. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>

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PowerPoint Slides	Instructor Activities
<p>Lesson Objectives</p> <ul style="list-style-type: none"> • Locate information in a record. • Update records when errors are identified. • Address lost claims. 	<p>DISPLAY slide 5. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>
<p>Knowledge Check</p>  <pre> graph TD P1[PHASE 1 Mandatory Training] --> C1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> C2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> C3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> C4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> C5{Multiple Knowledge Check} P5 --> P6[PHASE 6 Processing Claims] P6 --> C6{Multiple Knowledge Check} style C4 stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide 6. "Knowledge Check"</p> <p>EXPLAIN that a Knowledge Check will be given at the end of Phase 4 that covers all material learned in Phase 4 lessons.</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>For Your Review—Pension Systems and Applications</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Access the Appendix A: Pension Claims eFolder/Records Management worksheet. ○ Access the Pension Systems and Applications job aid, located in the VSR Assistant from the PMC VSR button. ○ In the worksheet, write the appropriate system or application next to the corresponding description. ○ Once complete, share your worksheet with another trainee. • Time allowed: 5 min. 	<p>DISPLAY slide</p> <p>7. “For Your Review—Pension Systems and Applications”</p> <p>REMIND trainees that the claimant’s electronic record is maintained in a number of different systems, which they learned about in an earlier lesson.</p> <p>EXPLAIN that the PMC VSR and other VBA employees are responsible for ensuring the claimant’s records are consistent across all the systems and to make corrections when errors are found or when changes occur.</p> <p>INSTRUCT trainees to complete the Appendix A: Pension Claims eFolder/Records Management worksheet and share with another trainee when complete.</p> <div style="text-align: center;">  </div> <p>REFER trainees to the Pension Systems and Applications job aid, located in the VSR Assistant from the PMC VSR button.</p>

You will have five minutes to complete this exercise. Write the appropriate system or application next to the corresponding description.

System	Description
<i>COVERS</i>	Tracks the location of paper folders within and between offices. Tracks the file number, name, power of attorney, and current location of each folder. Used to request transfer of paper folders. Prints paper claim labels.

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System	Description
<i>PIES</i>	Used to request verification of service as well as service treatment records from the National Personnel Records Center (NPRC).
<i>VBMS</i>	Has interdependency with the VETSNET legacy system. Used to: <ul style="list-style-type: none"> • Review claim documents. • Review the eFolder. • View VVA documents. • Upload documents into the respective eFolder. • View the Veteran's Profile, Dependents, Military Service, Power of Attorney (POA), and Intent to File Records, Rated Issues and Flashes. • Insert Notes.
<i>SHARE</i>	Microsoft Windows-based client/server application that allows employees to inquire against legacy information such as Beneficiary Identification Records Locator Subsystem (BIRLS), BDN, and other agencies' information. Updates both legacy and corporate information with one transaction.
<i>VVA</i>	An online electronic work environment (EWE) designed for processing pension claims. Used primarily to: <ul style="list-style-type: none"> • Review claim documents. • Complete data match with the Social Security Administration. • Insert documents into the respective eFolder.

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System	Description
MAP-D	<p>Supports development of claims and workflow tracking and provides single processing development capability. Used primarily to:</p> <ul style="list-style-type: none"> • Generate development letters requesting additional information from the beneficiary. • Insert notes, evidence received, and additional information that may be applicable for ease of claims processing.

PowerPoint Slides	Instructor Activities
<p>For Your Review—Pension Systems and Applications Answers</p> <ul style="list-style-type: none"> • <i>COVERS</i>: Tracks the location of paper folders within and between offices. Tracks the file number, name, power of attorney, and current location of each folder. Used to request transfer of paper folders. Prints paper claim labels. • <i>PIES</i>: Used to request verification of service as well as service treatment records from the National Personnel Records Center (NPRC). • <i>VBMS</i>: Has an interdependency with the VETSNET legacy system. Used to: <ul style="list-style-type: none"> ○ Review claim documents. 	<p>DISPLAY slide 8. and 9. “For Your Review—Pension Systems and Applications Answers”</p> <p>REVIEW correct answers with trainees and address any questions.</p> <p>PROVIDE any other background knowledge you may have from using these systems and applications on the job.</p>

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<ul style="list-style-type: none"> ○ Review the eFolder. ○ View VVA documents. ○ Upload documents into the respective eFolder. ○ View the Veteran's Profile, Dependents, Military Service, POA and Intent to File Records, Rated Issues and Flashes. ○ Insert Notes. ● <i>SHARE</i>: Microsoft Windows-based client/server application that allows employees to inquire against legacy information such as BIRLS, BDN, and other agencies' information. Updates both legacy and corporate information with one transaction. ● <i>VVA</i>: An online electronic work environment (EWE) designed for processing pension claims. Used primarily to: <ul style="list-style-type: none"> ○ Review claim documents. ○ Complete data match with the Social Security Administration. ○ Insert documents into the respective eFolder. ● <i>MAP-D</i>: Supports development of claims and workflow tracking and provides single processing 	

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PowerPoint Slides	Instructor Activities
<p>development capability. Used primarily to:</p> <ul style="list-style-type: none"> ○ Generate development letters requesting additional information from the beneficiary. ○ Insert notes, evidence received, and additional information that may be applicable for ease of claims processing. 	
<p>Locating and Updating a Claimant Record Job Aid</p> <ul style="list-style-type: none"> • The Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button, will be used throughout this lesson. • The job aid contains the following information: <ul style="list-style-type: none"> ○ The system/application ○ How to locate a record in a specific system/application ○ What information can be updated in a specific system/application ○ How to update information in a specific system/application 	<p>DISPLAY slide 10. "Locating and Updating a Claimant Record Job Aid"</p>  <p>REFER trainees to the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>REVIEW the job aid with trainees. Review the information given in tables 1–4.</p> <p>INSTRUCT trainees to follow along in the job aid as you review each system, what can be updated in each system, and how to perform updates in each system.</p>




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<p>The eFolder</p> <ul style="list-style-type: none"> • Housed in VVA or VBMS • Contains the following information: <ul style="list-style-type: none"> ○ Any information or documentation sent by the claimant ○ Information used by the PMC VSR or RVSR to make a claim decision ○ Any correspondence sent to the claimant 	<p>DISPLAY slide 11. "The eFolder"</p> <p>EXPLAIN the documentation that is kept in the eFolder, such as:</p> <ul style="list-style-type: none"> • Any information used to make a decision, such as award documents and rating decisions • Correspondence sent to the claimant • Evidence submitted by the claimant <p>EMPHASIZE the importance of being able to locate and update the eFolder and other electronic records, such as:</p> <ul style="list-style-type: none"> • The location of the eFolder may affect how it is updated and by who • Keeping the eFolder updated ensures that the claimant's information is current when making or justifying claim decisions • Updates to the eFolder may mean updates to a claimant's benefits



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<p>The Corporate Record</p> <ul style="list-style-type: none"> • Contains Veteran information that is created/updated in SHARE and/or VBMS • Veteran information found in the corporate record includes: <ul style="list-style-type: none"> ○ Veteran's name ○ DOB ○ SSN ○ Dependents ○ Service information ○ Information regarding previous claims ○ Award information 	<p>DISPLAY slide 12. "The Corporate Record"</p> <p>EXPLAIN what the corporate record contains:</p> <ul style="list-style-type: none"> • Veteran's name • DOB • SSN • Dependents • Service information • Information regarding previous claims • Award information <p>EMPHASIZE that the corporate record information is housed and updated in SHARE or VBMS.</p>
<p>The Claimant Record</p> <ul style="list-style-type: none"> • The claimant record includes everything from the eFolder and corporate record. • Any information found in any system or application pertaining to the claim is part of the claimant record. 	<p>DISPLAY slide 13. "The Claimant Record"</p> <p>EXPLAIN that the claimant record is all encompassing; it contains all information from the eFolder and corporate record.</p> <p>EMPHASIZE that everything pertaining to the claimant and his or her claim is found in the claimant record.</p>



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<p>Locate and Update the Record—SHARE</p> <ul style="list-style-type: none"> • SHARE is used to access: <ul style="list-style-type: none"> ○ BIRLS ○ Pre-conversion Compensation and Pension Master Records ○ Pending issue file ○ Payment history file ○ Corporate database ○ Social Security Administration ○ COVERS records ○ Rating information ○ Income, expense and net worth information 	<p>DISPLAY slide 14. “Locate and Update the Record—SHARE”</p> <p>LOGIN to SHARE (Academy mode).</p> <p></p> <p>DEMONSTRATE the steps to locate a record in SHARE using Table 1 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>SHOW an example of a record in SHARE and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid for a full list of common pieces of information that are updated in SHARE.</p> <p></p> <p>REFER to M21-1 III.ii.3.C.1 (Change of Address and Direct Deposit Processing) for more information on Change of Address.</p> <p>INSTRUCT trainees to perform a change of address in the demo case record following the steps outlined in Table 4 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p>



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<p>Locate and Update the Record—VVA</p> <ul style="list-style-type: none"> • Virtual VA (VVA) houses the Veteran’s eFolder • VVA provides electronic storage for applications and evidence received by the VA • Current storage location for all FTI claims due to its Personally Identifiable Information (PII) restriction capabilities • Allows the user to categorize, search, and sort the contents of the eFolder to assist in evaluating a claim 	<p>DISPLAY slide 15. “Locate and Update the Record—VVA”</p> <p>LOGIN to VVA (Academy mode).</p> <p></p> <p>DEMONSTRATE the steps to locate a record in VVA using Table 1 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>SHOW an example of a record in VVA and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button, for a full list of common pieces of information that are updated in VVA.</p> <p>INSTRUCT trainees to perform an SSA inquiry in the demo case record in VVA following the steps outlined in Table 4 of the Locating and Updating a Claimant Record job aid.</p>



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<p>Locate and Update the Record—MAP-D</p> <ul style="list-style-type: none"> • Tool used to provide good customer service to Veterans and their families • Used mainly for claim development • All development actions are automatically tracked 	<p>DISPLAY slide 16. “Locate and Update the Record—MAP-D”</p> <p>LOGIN to MAP-D (Academy mode).</p> <p></p> <p>DEMONSTRATE the steps to locate a record in MAP-D using Table 1 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>SHOW an example of a record in MAP-D and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid for a full list of common pieces of information that are updated in MAP-D.</p> <p>INSTRUCT trainees to perform an update of the claim suspense reason in the demo case record following the steps outlined in Table 4 of the Locating and Updating a Claimant Record job aid.</p> <p>INFORM trainees that they will learn about claim development in a later lesson.</p>



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<p>Locate and Update the Record—VBMS</p> <ul style="list-style-type: none"> • Currently being used for electronic storage for applications and evidence received by VA • Once fully developed, VBMS will be used to process electronic claims from start to finish • Will eventually replace all VA legacy systems 	<p>DISPLAY slide 17. “Locate and Update the Record—VBMS”</p> <p>LOGIN to VBMS (Demo mode).</p> <p></p> <p>DEMONSTRATE to trainees the steps to locate a record in VBMS using Table 1 in the Locating and Updating a Claimant Record job aid.</p> <p>SHOW an example of a record in VBMS and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button, for a full list of common pieces of information that are updated in VBMS.</p> <p>INSTRUCT trainees to perform an edit of the date of receipt and the document type in the demo case record following the steps outlined in Table 4 of the Locating and Updating a Claimant Record job aid.</p>


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<p>Locate and Update the Record—COVERS</p> <ul style="list-style-type: none"> • The primary function of COVERS is to track the location of folders within and between offices • Uses barcode technology to support RO/PMC and Record Management Center (RMC) folder activities, including: <ul style="list-style-type: none"> ○ Requests ○ Mail ○ Search ○ External transfers • COVERS tracks the following: <ul style="list-style-type: none"> ○ File number ○ File name ○ Power Of Attorney (POA) ○ Current and historical location of folder 	<p>DISPLAY slide 18. “Locate and Update the Record—COVERS”</p> <p>LOGIN to COVERS (Academy mode).</p> <p></p> <p>DEMONSTRATE the steps to locate a record in COVERS using Table 1 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>SHOW an example of a record in COVERS and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button, for a full list of common pieces of information that are updated in COVERS.</p> <p>INSTRUCT trainees to perform an update of physical folder location in the demo case record following the steps outlined in Table 4 of the Locating and Updating a Claimant Record job aid.</p>

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<p>Locating and Updating the Record—PIES</p> <ul style="list-style-type: none"> • You will use PIES if you receive a claim from a Veteran requiring service records or records not already in VA custody • Provides the ability to search the BIRLS database for Veteran information • Can be used to search for: <ul style="list-style-type: none"> ○ An existing 3101 request ○ Checking the status of a 3101 request ○ Printing a 3101 request ○ Selecting appropriate reports 	<p>DISPLAY slide 19. “Locate and Updating the Record—PIES”</p> <p>LOGIN to PIES.</p> <p></p> <p>DEMONSTRATE the steps to locate a record in PIES using Table 1 in Locating the Updating a Claimant Record job aid. Explain that they will learn more about the purpose of a 3101 request in a later lesson.</p> <p>SHOW an example of a record in PIES and what information can be updated in the record.</p> <p></p> <p>REFER to Table 2 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button, for a full list of common pieces of information that are updated in PIES.</p> <p>PERFORM with the trainees an edit of a 3101 request for service information in the demo case record following the steps outlined in Table 4 of the Locating and Updating a Claimant Record job aid.</p>


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<p>Practice Exercise—Scenarios</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Access the Locating and Updating a Claimant Record job aid.○ Review the items needing updating and the associated questions on the next slides.○ Raise your hand when you know the answer.○ Each correct answer is worth five points.○ The first person to answer correctly receives the points.• Time allowed: 10 min.	<p>DISPLAY slide 20. “Practice Exercise—Scenarios”</p> <p>READ the activity instructions on the slide to the trainees.</p>  <p>REFER to Table 3 in the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>EXPLAIN that they may use the job aid to determine the correct answer. Keep track of points on a sheet of paper or whiteboard.</p>


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<p>Practice Exercise—Scenario (1 of 3)</p> <p>You have received new evidence that contains information about dependents. You review the claim file and do not find any information regarding dependents. You determine that you need to update the claim file to reflect the new dependents.</p> <ol style="list-style-type: none">1. What system will you need to access to update dependent information?2. Where in the system do you need to access to review and add dependent information?	<p>DISPLAY slide 21. "Practice Exercise—Group Scenario (1 of 3)"</p> <p>READ the scenario and questions to the trainees.</p> <p>REMIND trainees to raise their hand when they think they know the answers. The first trainee to answer both questions correctly receives 5 pts. Keep track of the points earned by each trainee on a piece of paper or a white board.</p> <p>REMIND trainees that they can use Table 3 in the Locating and Updating a Claimant Record job aid to research the answers.</p>


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<p>Practice Exercise—Scenario Answers (1 of 3)</p> <p>Scenario 1:</p> <ul style="list-style-type: none">You have received new evidence that contains information about dependents. You review the claims file and do not find any information regarding dependents. You determine that you need to update the claims file to reflect your findings regarding the new dependents. <ol style="list-style-type: none">What system will you need to access to update dependent information? <i>SHARE</i>Where in the system do you need to access to review and add dependent information? <i>Dependents tab</i>	<p>DISPLAY slide</p> <p>22. "Practice Exercise—Group Scenario Answers (1 of 3)"</p> <p>DISCUSS answers with trainees.</p> <p></p> <p>DEMONSTRATE steps for locating and updating dependents in SHARE using a demo case.</p>




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<p>Practice Exercise—Scenario (2 of 3)</p> <p>You have attempted to reach a claimant by phone regarding additional information needed but have been unable to make contact.</p> <ol style="list-style-type: none"> 1. What system will you need to access to document your unsuccessful phone calls to the claimant? 2. Where in the system do you need to document this information? 	<p>DISPLAY slide 23. "Practice Exercise—Group Scenario (2 of 3)"</p> <p>READ the scenario and questions to the trainees. The first trainee to answer both questions correctly receives 5 pts. Keep track of the points earned by each trainee on a piece of paper or a white board.</p> <p>REMINDE trainees that they can use Table 3 in the Locating and Updating a Claimant Record job aid to research the answers.</p>
<p>Practice Exercise—Scenario Answers (2 of 3)</p> <p>Scenario 2:</p> <ul style="list-style-type: none"> • You have attempted to reach a claimant by phone regarding additional information needed but have been unable to make contact. <ol style="list-style-type: none"> 1. What system will you need to access to document your unsuccessful phone calls to the claimant? <i>MAP-D</i> 2. Where in the system do you need to document this information? <i>Notes</i> 	<p>DISPLAY slide 24. "Practice Exercise—Group Scenario Answers (2 of 3)"</p> <p>DISCUSS answers with trainees.</p> <div style="text-align: center;">  </div> <p>DEMONSTRATE steps for locating and updating the Notes in MAP-D using a demo case.</p>


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PowerPoint Slides	Instructor Activities
<p>Practice Exercise—Scenario (3 of 3)</p> <p>You have received a new claim. You know your first step is to perform an SSA inquiry.</p> <ol style="list-style-type: none"> 1. What system will you need to access to perform the SSA inquiry? 2. What information do you need to access the eFolder to begin the inquiry? 	<p>DISPLAY slide 25. "Practice Exercise—Group Scenario (3 of 3)"</p> <p>READ the scenario and questions to the trainees. The first trainee to answer both questions correctly receives 5 pts. Keep track of the points earned by each trainee on a piece of paper or a white board.</p> <p>REMINDE trainees that they can use Table 3 in the Locating and Updating a Claimant Record job aid to research the answers.</p>
<p>Practice Exercise—Scenario Answers (3 of 3)</p> <p>Scenario 3:</p> <ul style="list-style-type: none"> • You have received a new claim. You know your first step is to perform an SSA inquiry. <ol style="list-style-type: none"> 1. What system will you need to access to perform the SSA inquiry? <i>VVA</i> 2. What information do you need to access the eFolder to begin the inquiry? <i>SSN or file number</i> 	<p>DISPLAY slide 26. "Practice Exercise—Group Scenario Answers (3 of 3)"</p> <p>DISCUSS answers with trainees.</p> <div style="text-align: center;">  </div> <p>DEMONSTRATE steps for locating and beginning an SSA inquiry in VVA using a demo case.</p>



Lesson 3: Pension Claims eFolder/Records Management
Lesson Plan

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<p>Lost Claims</p> <ul style="list-style-type: none"> You may receive new information for a claim that needs to be added or updated, but when you search, you are unable to locate the claim. In the event you are unable to locate a claim or claim materials, follow the steps in M21-1 III.ii.4.D. (Lost Paper Claims Folders, Reconciliation of Duplicate Records in the Beneficiary Identification and Records Locator Subsystem (BIRLS), and Misplaced Claims Documents) 	<p>DISPLAY slide 27. "Lost Claims"</p> <p>EXPLAIN that losing a claim is rare due to the implementation of upfront scanning for centralized mail.</p> <p>EMPHASIZE that the manual provides a process for handling lost claims.</p>  <p>REFER trainees to CPKM to read M21-1 III.ii.4.D. (Lost Paper Claims Folders, Reconciliation of Duplicate Records in the Beneficiary Identification and Records Locator Subsystem (BIRLS), and Misplaced Claims Documents)</p>
<p>Lost Claims Checklist</p> <ul style="list-style-type: none"> Each PMC has a Lost Claims Checklist used to document the attempts made to determine if a claim is lost. You are responsible for attempting to locate the claim. The checklist should be printed out and, once completed and signed; it should be forwarded to your supervisor. Instances of lost claims have been greatly reduced and are rare due to upfront scanning replacing centralized mail. 	<p>DISPLAY slide 28. "Lost Claims Checklist"</p>  <p>REFER trainees to the Lost Claims Checklist.</p>  <p>EXPLAIN each step in the Lost Claims Checklist. If the step involved a VA system/application, demo the step in the Academy/Demo mode of the system/application.</p> <p>PROVIDE any best practices from your personal experiences locating a lost claim that may not be covered in the checklist.</p>



Lesson 3: Pension Claims eFolder/Records Management
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<p>Practice Exercise—Update the Record</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide trainees into groups of three. ○ Provide each group with a written synopsis of the case they will need to locate and update. ○ Have each group locate the record and update the record based on the synopsis given. ○ When complete, review each case with all groups to show how each record was located and what was updated. • Time allowed: 20 min. 	<p>DISPLAY slide 29. “Practice Exercise—Update the Record”</p> <p>REFER trainees to the Locating and Updating a Claimant Record job aid.</p>  <p>REFER trainees to the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>EXPLAIN the exercise and answer any questions the trainees may have regarding what they will need to perform during the exercise.</p> <p>ACCESS the following demo cases to perform the following:</p> <ul style="list-style-type: none"> • Change of address (SHARE) • Change of direct deposit (SHARE) • Add dependents (SHARE) • Add SSA inquiry (VVA) • Edit attributes of a document (VVA) • Update claim suspense reason (MAP-D) • Update claim Notes (MAP-D) • Add date received to a tracked item (MAP-D) • Edit date of receipt and document type (VBMS) • Add claim Notes (VBMS) • Update current physical location of a folder (COVERS) • Create 3101 with service information (PIES)

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<p>Practice Exercise—Update the Record Answers</p> <ul style="list-style-type: none">• Review each case and the appropriate system and steps as outlined in the job aid and by the instructor.• Did your group update and locate the record correctly?• Use this time to ask questions and get any clarification needed on locating and updating a claimant record.	<p>DISPLAY slide 30. “Practice Exercise—Update the Record Answers”</p>  <p>REFER to the Locating and Updating a Claimant Record job aid, located in the VSR Assistant from the PMC VSR button.</p> <p>REVIEW each case using the job aid, pointing out the steps as you go in the system/application and the job aid.</p>  <p>ASK if there are any questions regarding the:</p> <ul style="list-style-type: none">• Cases• Systems/applications used• Process of locating a record• Process for updating a record

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<p>Questions?</p> 	<p>DISPLAY slide 31. "Questions"</p> <p>REVIEW the key concepts of this lesson:</p> <ul style="list-style-type: none"> • Locate information in a record. • Update records when errors are identified. • Address lost claims.  <p>ASK if there are any concepts that are unclear or may need further review.</p> <p>REMINDE trainees to use and review the Locating and Updating a Claimant Record job aid and the Lost Claims Checklist job aid, both located in the VSR Assistant from the PMC VSR button.</p>
<p>What's Next</p> <ul style="list-style-type: none"> • Phase 4, Lesson 4, Provide Benefit Information • Review of all job aids provided in this lesson 	<p>DISPLAY slide 32. "What's Next"</p> <p>DISCUSS the upcoming lesson with trainees.</p> <p>EMPHASIZE that they review all previous lessons, job aids, handouts, and references if needed.</p>