



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 4: Introduction to Pension
Management

Lesson 4: Provide Benefit Information

Lesson Plan

October 28, 2016

Version 1.0

Lesson 4: Provide Benefit Information
Lesson Plan

Provide Benefit Information

Lesson Overview

Topic	Description
Time Estimate:	1 hour
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 prepare PMC VSRs to respond to direct inquiries from beneficiaries requesting benefit information.
Prerequisite Training Requirements:	Prior to taking the Provide Benefit Information lesson, trainees must complete: PMC VSR Core Course <ul style="list-style-type: none">• Phases 1–3• Phase 4, Lessons 1-3
Target Audience:	This lesson is for entry level PMC VSRs.

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Topic	Description
Lesson References:	<ul style="list-style-type: none"> • Master Course Map learning aid • VA Form 27-0820 (Report of General Information) • VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) • M27-1 I.2.2 (Providing Information to a Third Party) • M27-1 I.2.3 (Providing Information About VA Benefits) • M27-1 I.2.6 (Handing Non-Claim Actions) • M27-1 I.2.7 (Claimant Representation by Non-Attorney or Non-Accredited Agents) <ul style="list-style-type: none"> ○ M27-1 I.2.7.a (Regulatory References for Claimant Representation) ○ M27-1 I.2.7.b (Background on Claimant Representation) • M27-1 I.7 (Freedom of Information Act [FOIA] and Privacy Act [PA]) • 38 CFR 14.630 (Authorization for a Particular Claim) • 38 CFR 1.502 (Disclosure of the Amount of Monetary Benefits) • Provide Benefit Information job aid
Knowledge Check:	Phase 4: Introduction to Pension Management Knowledge Check
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • VBA Applications (PMC VSR)
Lesson Objectives:	<ul style="list-style-type: none"> • Respond to direct inquiries from callers requesting benefit information <ul style="list-style-type: none"> ○ Verify inquirer before providing information ○ Provide correct pension benefit information ○ Document the call in Modern Awards Processing Development (MAP-D) notes and/or on VA Form 27-0820

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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 • Access to CPKM • Access to the Provide Benefit Information job aid from VSR Assistant • Access to Accreditation Search website • Caller story: Examples of first party call and third party call • In MAP-D, an example of a documented call • Paper for group activity • One example of actual VSO or POA information

Instructor Notes

This lesson provides trainees with the information and references needed to properly verify, provide, and document benefit information. This lesson presents opportunities to work in small groups and pairs to practice scenarios related to determining the type of caller, the information needed to verify the caller, and the type of information that can be provided to the caller. Trainees will complete a comprehensive assessment and survey in TMS upon completion of this phase.

PowerPoint Slides	Instructor Activities
Provide Benefit Information	<p>DISPLAY slide</p> <p>1. "Provide Benefit Information"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>



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PowerPoint Slides	Instructor Activities
<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 P4 stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide 2. "You Are Here"</p>  <p>REFER to the Master Course Map learning aid in the Trainee Guide.</p> <p>DESCRIBE the diagram.</p> <p>EXPLAIN where the trainees are in the phase, what they have completed, and where they are headed next.</p>
<p>Icebreaker Activity</p> <p>Scenario:</p> <ul style="list-style-type: none"> You receive a phone call from a person requesting information about benefits for Veteran John C. Hall. How do you respond? The next steps are critical because they can affect the benefits and privacy of a Veteran or beneficiary. Performing these steps incorrectly, could put the benefits received by a Veteran or beneficiary in jeopardy. 	<p>DISPLAY slide 3. "Icebreaker Activity"</p> <p>READ the scenario.</p>  <p>ASK the trainees what they would do in this situation and wait for responses.</p> <p>EXPLAIN the consequences of mishandling and miscommunicating benefit information based on your own experiences in fielding calls about benefit information.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> Program Benefits and Eligibility (PMC VSR) VBA Applications (PMC VSR) 	<p>DISPLAY slide 4. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>


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<p>Lesson Objectives</p> <ul style="list-style-type: none"> Respond to direct inquiries from callers requesting benefit information. Verify the inquirer before providing information. Provide correct pension benefit information. Document the call in Modern Awards Processing Development (MAP-D) notes and/or on VA Form 27-0820. 	<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] --> L1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> L2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> L3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> L4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> L5{Multiple Knowledge Check} P5 --> P6[PHASE 6 Processing Claims] P6 --> L6{Multiple Knowledge Check} </pre>	<p>DISPLAY slide 6. "Knowledge Check"</p> <p>INFORM the trainees that they will be assessed on this content in the Phase 4 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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<p>For Your Review</p> <ul style="list-style-type: none"> • Review M27-1 I.7 (Freedom of Information Act [FOIA]) • Review Privacy Act (PA) • Review how to conduct a reference search 	<p>DISPLAY slide 7. "For Your Review"</p>  <p>ASK trainees to summarize the key points of the FOIA and PA.</p> <p>KEY POINTS TO REVIEW:</p> <ul style="list-style-type: none"> • Definitions of FOIA and PA terms • Processing FOIA and PA requests • Charges and fees for processing FOIA and PA requests • Timeframes for responding to FOIA and PA requests • The language to use in interim responses to FOIA and PA requests, and • Controlling FOIA/PA requests <p>REMIND trainees that this information is used to determine what information can and cannot be provided to a caller requesting benefit information.</p> <p>REVIEW how to conduct a reference search.</p>  <p>REFER trainees to the CPKM site as a reminder of where these references can be accessed.</p>


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PowerPoint Slides	Instructor Activities
<p>Verify Inquirer</p> <ul style="list-style-type: none"> • Determine if the caller is a Veteran or surviving dependent (first party). • Verify the caller's ID by requesting that the caller provide at least 3 specific pieces of information about the beneficiary that is contained in SHARE, such as: <ul style="list-style-type: none"> ○ Beneficiary's SSN ○ Beneficiary's date of birth ○ Veteran's branch of service ○ Dates of the Veteran's service ○ Caller's full name (not required if caller has already been confirmed as the Veteran) 	<p>DISPLAY slide 8. "Verify Inquirer"</p> <p>DESCRIBE the types of questions that can be asked to determine if a caller is a Veteran or surviving dependent.</p> <p>PROVIDE an example from your own experience where you were unable to verify the identity of caller. Share with the trainees how you handled the call, such as:</p> <ul style="list-style-type: none"> • If the call was from the claimant, did you advise the claimant to call back with the correct information? <p>NOTE TO INSTRUCTOR: Do not use any real names when referring to on-the-job experiences.</p> <p>EXPLAIN why this is crucial in the overall process of providing benefit information.</p> <div style="text-align: center;">  </div> <p>REFER trainees to the VBA Intranet Homepage, Benefits Assistance Service to view M27-1 I.7 (Freedom of Information Act [FOIA] and Privacy Act [PA]) for FOIA requirements.</p>



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<p>Authorized Third Party Caller (1 of 4)</p> <ul style="list-style-type: none"> • Determine if the caller is a beneficiary or fiduciary. • If the caller is a Veterans Service Organization (VSO) or Power of Attorney (POA), verify his or her identity by asking for applicable identifying information, such as the POA's: <ul style="list-style-type: none"> ○ Name ○ Organization ○ County represented, if applicable ○ Telephone number • Verify accreditation by navigating to the Accreditation Search and confirming that he or she is listed on the beneficiary's file. 	<p>DISPLAY slide 9. "Authorized Third Party Caller (1 of 4)"</p> <p>EXPLAIN the difference between first party and third party callers. Inform trainees that VSO and POA will be discussed in more detail in later lessons.</p> <p>PROVIDE other examples of identifying information, if applicable.</p> <div style="text-align: center;">  </div> <p>REFER trainees to the Accreditation Search website.</p> <p>DEMONSTRATE how to access the Accreditation Search website using actual VSO or POA information.</p>

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<p>Authorized Third Party Caller (2 of 4)</p> <ul style="list-style-type: none">• If a POA is found in the accreditation search, treat the POA as a first party caller and ask for the Veteran's:<ul style="list-style-type: none">○ Full name○ SSN or claim number○ Branch of service• If the POA does not know any identifying information, inform the POA that you will need one of the following:<ul style="list-style-type: none">○ A written request from the Veteran or claimant (i.e., VA Form 21-0845, Authorization to Disclose a Record in the Presence of a Third Party)○ The Veteran or claimant to call VA, or a call back when the unknown information is located• If the POA's organization is not showing in the system:<ul style="list-style-type: none">○ Tell the POA that you do not show the organization as having POA.	<p>DISPLAY slide 10. "Authorized Third Party Caller (2 of 4)"</p>  <p>REFER trainees to the Accreditation website and show an example of a POA found.</p> <p>PROVIDE an example of a time you had a POA not able to give the information needed and how you handled the situation.</p> <ul style="list-style-type: none">• What did you advise the POA to do to get the information?• Did you receive a written request or phone call from the claimant?• How often does the POA not show up in the system when searching?

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<p>Authorized Third Party Caller (3 of 4)</p> <ul style="list-style-type: none"> If the individual is listed on the VA Form 21-0845 (Authorization to Disclose Personal Information to a Third Party), verify the security question under box 11 on the form in addition to ID protocol requirements. VA will accept only one person or organization as an authorized party listed on this form. 	<p>DISPLAY slide 11. "Authorized Third Party Caller (3 of 4)"</p>  <p>REFER trainees to sample of VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) that can be found in CPKM. Direct them to navigate to CPKM, locate the form, and find box 11. Ask for a volunteer to read the five questions out loud.</p> <p>EXPLAIN that the individual MUST be listed on VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) in order to provide specific Veteran benefit information.</p>
<p>Authorized Third Party Caller (4 of 4)</p> <ul style="list-style-type: none"> Specifics about the claim can be communicated to this authorized person; however, you cannot take information from him or her as a first party to adjust benefits. Individuals acting under the provisions of 38 CFR 14.630 (Authorization for a Particular Claim), are commonly known or referred to as "lay-persons." Any person may be authorized to prepare, present, and prosecute one claim. Reference: M27-1 I.2.7.a-b (Claimant Representation by Non-Attorney or Non-Accredited Agents). 	<p>DISPLAY slide 12. "Authorized Third Party Caller (4 of 4)"</p> <p>PROVIDE examples of specific information that can be provided to an authorized third party caller, such as:</p> <ul style="list-style-type: none"> Claim status Benefit amounts  <p>REFER trainees to the VBA Intranet Homepage, Benefits Assistance Service to view 38 CFR 14.630 and M27-1 I.2.7.a-b (Claimant Representation by Non-Attorney or Non-Accredited Agents). Have trainees navigate to the correct page and request one of the trainees read the reference out loud.</p> <p>EXPLAIN in detail the meaning of each reference.</p>


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<p>Pop Quiz (1 of 2)</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of two. ○ Access the Provide Benefit Information job aid. ○ Review the questions. ○ Write answers on a blank sheet of paper. ○ Submit answers to instructor. • Time allowed: 5 minutes 	<p>DISPLAY slide 13. "Pop Quiz (1 of 2)"</p> <p>DIVIDE trainees into groups of 2. Assign groups or ask trainees to form groups.</p> <p>REFER trainees to the Provide Benefit Information job aid located in the VSR Assistant from the PMC VSR button.</p> <p>DIRECT trainees to consult with their group members to answer the two questions on the next slide.</p> <p>ALLOW 5 minutes to complete the quiz.</p>
<p>Pop Quiz (2 of 2)</p> <ul style="list-style-type: none"> • Question #1: What information do you need to verify a caller's identity? • Question #2: What must you verify if the caller is a VSO or POA? 	<p>DISPLAY slide 14. "Pop Quiz (2 of 2)"</p> <p>PROVIDE the questions to the trainees:</p> <ul style="list-style-type: none"> • Question #1: What information do you need to verify a caller's identity? • Question #2: What must you verify if the caller is a VSO or POA?


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<p>Pop Quiz Answers</p> <ul style="list-style-type: none"> • Question #1: What information do you need to verify a caller's identity? <ul style="list-style-type: none"> ○ <i>Beneficiary's SSN</i> ○ <i>Beneficiary's date of birth</i> ○ <i>Veteran's branch of service</i> ○ <i>Dates of the Veteran's service</i> ○ <i>Other information only the beneficiary would know</i> ○ <i>Caller's full name (not required if caller has already been confirmed as the Veteran)</i> • Question #2: What must you verify if the caller is a VSO or POA? <ul style="list-style-type: none"> ○ <i>Name</i> ○ <i>Organization</i> ○ <i>County represented, if applicable</i> ○ <i>Telephone number</i> ○ <i>Accreditation</i> 	<p>DISPLAY slide 15. "Pop Quiz Answers"</p> <p>DISCUSS each group's answers. Give feedback for each group's answers supported with examples or references.</p>



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<p>Caller Story</p> <ul style="list-style-type: none"> • Common errors made during calls are: <ul style="list-style-type: none"> ○ Giving out too much information to someone who is not authorized ○ Providing too much information to a POA 	<p>DISPLAY slide 16. “Caller Story”</p> <p>DISCUSS with the trainees particular instances when you had to provide benefit information to first party and third party callers. Use the following questions to guide your experience:</p> <ul style="list-style-type: none"> • How have your methods or processes changed over time with experience? • What kind of reactions can PMC VSRs expect from callers requesting information? • What are some common mistakes made during these calls? <p style="text-align: center;"></p> <p>EMPHASIZE the way the instance or instances were handled and what you could/would have done differently.</p> <p>DISCUSS common errors that are made during these calls and the best way to avoid or resolve these errors. Such as:</p> <ul style="list-style-type: none"> • Giving out too much information to someone who is not authorized • Providing too much information to a POA
<p>Provide Benefit Information—First Party</p> <ul style="list-style-type: none"> • PMC VSR may provide the status of a claim to any first party call after verification: <ul style="list-style-type: none"> ○ Initial review pending ○ Development ○ Due process ○ Authorization 	<p>DISPLAY slide 17. “Provide Benefit Information—First Party”</p> <p>PROVIDE any additional information that may be provided regarding the status of a claim, such as:</p> <ul style="list-style-type: none"> • Any other information that may have been provided in writing by the Veteran or beneficiary • Financial information



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<p>Provide Benefit Information—Third Party</p> <ul style="list-style-type: none"> • The current amount of monthly public funds (VA benefits) paid to a VA beneficiary is considered public information and can be released to anyone. • The caller must be an authorized third party to receive any other kind of benefit information. 	<p>DISPLAY slide 18. “Provide Benefit Information—Third Party”</p> <p>REVIEW criteria for a caller to be considered an authorized third party.</p> <p>EMPHASIZE what constitutes public information and give examples, such as:</p> <ul style="list-style-type: none"> • Current amount of monthly public funds • Status of a claim  <p>REFER trainees to 38 CFR 1.502 (Disclosure of the amount of monetary benefits) for further guidance. Have trainees navigate to the correct page and ask a trainee to read a portion of the reference aloud.</p>
<p>General VA Questions</p> <ul style="list-style-type: none"> • General VA questions should be answered to include the following: <ul style="list-style-type: none"> ○ Help with forms ○ Verification of benefit rate ○ Description of pension ○ PMC fax number or mailing address ○ National Calling Center (NCC) toll free number 	<p>DISPLAY slide 19. “General VA Questions”</p> <p>EXPAND on the list provided by giving examples of the most common items. Give guidance on exactly how much information can be provided for each item.</p> <p>PROVIDE examples from your personal experience of the types of general questions you have received, such as:</p> <ul style="list-style-type: none"> • Was my claim received? • What is the status of my claim? • How long will it take to complete my claim? • Can my claim be expedited? • When will I receive a letter about my claim?


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<p>Practice Exercise—Scenario</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Review the scenario on the next slide. ○ Access the Provide Benefit Information job aid. ○ Write responses on a sheet of paper. ○ Once completed, trade answers with another trainee and compare. • Time allowed: 5 minutes 	<p>DISPLAY slide 20. "Practice Exercise scenario"</p> <p style="text-align: center;"></p> <p>ASK trainees to have a pen and paper to compose their answers.</p>
<p>Group Activity—Scenario</p> <p>Scenario:</p> <p>You receive a call from a woman named Jennifer Fein. Ms. Fein states that she is the POA for Veteran Lindsay McCaffrey and that she would like to know what benefits Ms. McCaffrey is receiving and the dollar amounts being received. You have obtained the POA's identifying information and confirmed that that POA is accredited. Based on the information provided, what information can you give Ms. Fein?</p>	<p>DISPLAY slide 21. "Group Activity—Scenario"</p> <p style="text-align: center;"></p> <p>ASK trainees to review the scenario and write down their responses on paper. Give trainees 3 to 5 minutes to compose their responses. Once they have all written down their responses, have the trainees trade responses and compare them.</p>



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<p>Group Activity—Scenario Answers</p> <ul style="list-style-type: none"> • Based on the information given, you can provide the following information to the third party caller: <ul style="list-style-type: none"> ○ <i>Status of claim</i> ○ <i>Benefit amount</i> 	<p>DISPLAY slide 22. “Group Activity—Scenario Answers”</p> <p>DISCUSS the answers among the trainees and ask them to identify and trends or inconsistencies among their responses.</p> <p>ADDRESS any issues or questions that arise from the comparisons.</p>
<p>Document the Call</p> <p>Document in MAP-D or VA Form 27-0820 (Report of General Information), any necessary information based on the type of caller, such as:</p> <ul style="list-style-type: none"> • Claimant • Fiduciary • VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) • VSO/POA • Others 	<p>DISPLAY slide 23. “Document the Call”</p>  <p>REFER trainees to MAP-D. Have them all navigate to MAP-D.</p> <p>DEMONSTRATE how to document a call in MAP-D.</p> <p>EXPLAIN the differences between documenting a call in MAP-D versus VA Form 27-0820 (Report of General Information).</p>  <p>EMPHASIZE what should be documented and the best way to document based on your experience. Be sure to include common errors and how to resolve them.</p>

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<p>Practice Exercise—Scenario</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Review the scenario on the next slide. ○ Access the Provide Benefit Information job aid. ○ Using the provided VA Form 27-0820 (Report of General Information), document the form the way you would as if the scenario was a phone call taking place. ○ Once completed, trade answers with another trainee and compare. • Time allowed: 5 minutes 	<p>DISPLAY slide 24. “Practice Exercise—Scenario”</p>  <p>REFER trainees to the VA Forms website and direct them to download and print a copy of VA Form 27-0820 (Report of General Information).</p>
<p>Practice Exercise—Scenario</p> <p>Scenario:</p> <p>You receive a call from a woman named Jennifer Fein. Ms. Fein states that she is the POA for Veteran Lindsay McCaffrey and that she would like to know what benefits Ms. McCaffrey is receiving and the dollar amounts. You have obtained the POA’s identifying information and confirmed that that POA is accredited. Based on the information provided, what information can you give Ms. Fein?</p>	<p>DISPLAY slide 25. “Practice Exercise—Scenario”</p> <p>SHOW the scenario. Instruct trainees to review the scenario and complete the VA Form the way they would if the scenario were a live call. Give them three to five minutes to complete the exercise. Once completed, have them trade forms with each other to compare how each of them documented the call.</p> <p>PROVIDE a completed example to show correct information and give feedback.</p>

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<p>Concept Review—Trivia Game</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into pairs. ○ Access the Provide Benefit Information job aid. ○ Review the question given. ○ Have one team member raise a hand when ready to answer. • Total of 5 questions: <ul style="list-style-type: none"> ○ Question 1: 5 pts ○ Question 2: 4 pts ○ Question 3: 3 pts ○ Question 4: 2 pts ○ Question 5: 1 pt • Time allowed: 10 minutes 	<p>DISPLAY slide 26. "Concept Review—Trivia Game"</p>  <p>ASK trainees to pair off, forming teams of 2.</p>
<p>Concept Review—Trivia Game</p> <ul style="list-style-type: none"> • Question #1: What do you need to do to verify a first-party caller? Authorized third party caller? • Question #2: What benefit information can be provided to a first party or authorized third party caller? • Questions #3: What benefit information can be provided to anyone? • Question #4: General VA questions pertain most commonly to what types of information? 	<p>DISPLAY slide 27. "Concept Review—Trivia Game"</p>  <p>ASK each question, one at a time. The team to raise their hand and answer the question correctly first receives the number of points listed for each question. Keep track of points won by each team on a whiteboard. Tally the number of points at the end to determine the winning team.</p>



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<p>Concept Review—Trivia Game Answers (1 of 2)</p> <ul style="list-style-type: none"> • Question #1: What do you need to do to verify a first party caller? Authorized third party caller? <ul style="list-style-type: none"> ○ <i>For a first party caller: Beneficiary's SSN, date of birth, branch of service, dates of Veteran's service, caller's name</i> ○ <i>For an Authorized third party caller: For a VSO name, organization, county represented, telephone number, accreditation search, individual listed on VA Form 21-0845. For a POA, treat as a first party caller, accreditation search.</i> • Question #2: What benefit information can be provided to a first party or authorized third party caller? <ul style="list-style-type: none"> ○ <i>Status of claim, current amount of monthly public funds, verification of benefit rate, any other information regarding the Veteran's benefits</i> 	<p>DISPLAY slide</p> <p>28. "Concept Review—Trivia Game Answers (1 of 2)"</p> <p>PROVIDE trainee teams with results and winner of the game. Go over answers, ask trainees if any clarification is needed, and provide guidance as needed.</p>

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<p>Concept Review—Trivia Game Answers (2 of 2)</p> <ul style="list-style-type: none">• Question #3: What benefit information can be provided to anyone?<ul style="list-style-type: none">○ <i>Current amount of monthly public funds (VA benefits) paid to a beneficiary</i>• Question #4: General VA questions pertain most commonly to what types of information?<ul style="list-style-type: none">○ <i>Help with forms</i>○ <i>Verification of benefit rate</i>○ <i>Description of pension</i>○ <i>PMC fax number or mailing address</i>○ <i>National Call Center (NCC) toll free number</i>	<p>DISPLAY slide</p> <p>29. "Concept Review—Trivia Game Answers (2 of 2)"</p> <p>PROVIDE trainee teams with results and winner of the game. Go over answers, ask trainees if any clarification is needed, and provide guidance as needed.</p>

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PowerPoint Slides	Instructor Activities
<p>Lesson Summary</p> <ul style="list-style-type: none"> • Verifying the caller is extremely important when you receive a request for benefits as you are the only one able to provide information regarding the benefits of the Veteran or beneficiary. • Be cautious when providing information to a third party caller as the caller may not be authorized to receive all benefit information. 	<p>DISPLAY slide 30. "Lesson Summary"</p> <p>REVIEW the common errors when providing benefit information, such as:</p> <ul style="list-style-type: none"> • Providing too much information to an unauthorized caller • Providing information other than what is given on VA Form 21-0845 (Authorization to Disclose a Record in the Presence of a Third Party) <p>REVIEW what information can be given to anyone calling, such as:</p> <ul style="list-style-type: none"> • Status of a claim • Amount being received by the beneficiary
<p>Questions?</p> 	<p>DISPLAY slide 31. "Questions?"</p>  <p>ASK 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>
<p>What's Next</p> <p>Phase 4: Introduction to Pension Management Knowledge Check Preparation</p>	<p>DISPLAY slide 32. "What's Next"</p> <p>DISCUSS the upcoming Phase 4: Introduction to Pension Management Knowledge Check Preparation.</p> <p>EMPHASIZE that they will review all previous lessons, job aids, handouts, and references before taking the Knowledge Check.</p>