



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 1: Determine Eligibility

Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims

Lesson Plan

October 28, 2016

Version 1.0

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Lesson Overview

Topic	Description
Time Estimate:	1.5 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 prepare PMC VSRs to identify special claims that should be expedited (priority) or have a flash and those that are previous claims or part of a dual claim.
Prerequisite Training Requirements:	Prior to taking the Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims lesson, trainees must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1, lessons 1–2. (Refer to the Master Course Map learning aid for a list of lessons.)
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.ii.1.D (Claims That Require Priority Processing) • M21-1 III.iii.1.D.1.b (Claimant Flashes) • M21-1 II.iv.2.B.3.d (New and Material Evidence) • M21-1 I.5.A.2.b (Overview of the Appeal Process) • Pension Systems and Applications job aid
Knowledge Check:	Phase 5: Stages of a claim, Part 1(a): Initial Screening and Claims Establishment Knowledge Check
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)

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Topic	Description
Lesson Objectives:	<ul style="list-style-type: none"> • Confirm the special claim types • Check whether an original claim was previously established • Check whether the original claim had a prior decision • Check whether evidence is new and material evidence • Determine if an appeal is pending
What You Need:	<ul style="list-style-type: none"> • Lesson plan • Master Course Map learning aid • 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 ○ MAP-D ○ VBMS ○ VACOLS • Access to the Pension Systems and Applications job aid from VSR Assistant • Claim 1 (pmc_vsr_case_3) that meets priority processing criteria • Claim 2 (pmc_vsr_case_2) a common claim that does not meets priority processing criteria. • Claim 3 (pmc_vsr_excerpt_a) new and material evidence: <ul style="list-style-type: none"> ○ Written and sworn testimony of the claimant or witnesses to an event ○ Lay statement from family member of friend of claimant ○ Medical nexus opinion with supporting rationale • Claim 4 (pmc_vsr_excerpt_b) decision to deny pension benefits and Notice of disagreement. This is for demonstrating a pending appeal.

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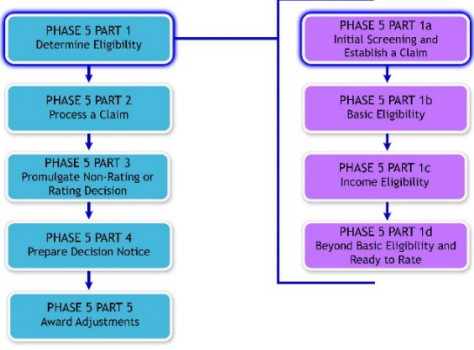


Topic	Description
	<ul style="list-style-type: none"> • Claim 5 (pmc_vsr_excerpt_c) provide a dual claim, complete VA Form 21-526 with comp and pension claim. • Claim 6 (pmc_vsr_excerpt_d) new claim, include original application with date stamp, a denial letter, and new evidence provided over a year later.

Instructor Notes


This lesson is a continuation of the initial screening process. This lesson provides trainees with the next steps in reviewing the work of the claims assistant by confirming and correcting any issues found with types of claims that are considered priority/special claims.

PowerPoint Slides	Instructor Activities
<p>Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims</p>	<p>DISPLAY slide</p> <p>1. "Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>

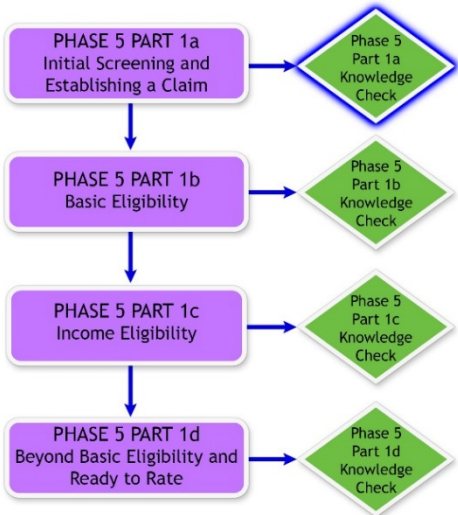

**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
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PowerPoint Slides	Instructor Activities
<p>You Are Here</p>  <pre>graph TD; P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim]; P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision]; P3 --> P4[PHASE 5 PART 4 Prepare Decision Notice]; P4 --> P5[PHASE 5 PART 5 Award Adjustments]; P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim] --> P1b[PHASE 5 PART 1b Basic Eligibility]; P1b --> P1c[PHASE 5 PART 1c Income Eligibility]; P1c --> P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate]; P1 --- P1a; P1 --- P1b; P1 --- P1c; P1 --- P1d;</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>INFORM trainees that Phase 5, Part 1: Determine Eligibility contains five subparts. The first subpart contains several lessons that focus on the initial screening.</p>  <p>EMPHASIZE that each of these lessons relates to the others as part of the initial screening process.</p>




**Lesson 3: Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
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PowerPoint Slides	Instructor Activities
<p>Initial Screening</p> <ul style="list-style-type: none"> • Complete or Incomplete Applications for Benefits • Fully Developed Claims • Flash, Expedited (Priority), Previous, Reopened and Dual Claims • Date of Claim • Validate POA • End Product Codes • Introduction to Old Law and Section 306 Pension 	<p>DISPLAY slide 3. "Initial Screening"</p> <p>EXPLAIN to the trainees that during the initial screening process, the PMC VSR verifies whether the Claims Assistant has processed the initial screening correctly and evaluates other aspects of the claim.</p> <p>INFORM trainees that this lesson will focus on determining if a claim will need to be processed as special (priority) claim.</p> <p>REMINDE trainees that they have learned how to perform the following parts of the initial screening:</p> <ul style="list-style-type: none"> • Determine whether the application for benefits is complete or incomplete. • Determine if a claim can be processed as a fully developed claim (FDC).
<p>What Do You Do?</p> <p>On November 17, 2015, the St. Paul PMC received a VA Form 21-527 EZ application for Service-Connected (SC) pension benefits for Veteran Delinda Wright. Ms. Wright lives in Chaska, MN, which is in the jurisdiction. Ms. Wright can be properly identified in SHARE. All of the information on the application has been completed and the application has been signed. There is a flash on the application.</p>	<p>DISPLAY slide 4. "What Do You Do?"</p> <p>REVIEW the scenario presented in presentation</p>  <p>ASK what about the scenario indicates that the claim may be priority and require special processing?</p> <ul style="list-style-type: none"> • <i>The application form used is for a FDC.</i> <ul style="list-style-type: none"> ○ <i>VA Form 21P-527EZ dated APR 2016 (Application for Pension)</i> • <i>There is a flash on the FDC application, which indicates expedited (priority) handling.</i> <p>FDC claims are considered priority claims and are flashed for expedited handling.</p>


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PowerPoint Slides	Instructor Activities
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) 	<p>DISPLAY slide 5. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>
<p>Lesson Objectives</p> <ul style="list-style-type: none"> • Confirm the special claim types. • Check whether an original claim was previously established. • Check whether the original claim had a prior decision. • Check whether evidence is new and material evidence. • Determine if an appeal is pending. 	<p>DISPLAY slide 6. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>
<p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B{Phase 5 Part 1a Knowledge Check} B --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} D --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} F --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} </pre>	<p>DISPLAY slide 7. "Knowledge Check"</p> <p>EXPLAIN that a Knowledge Check will be given at the end of Phase 5, Part 1(a), that covers all material learned in Phase 5, Part 1(a).</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>Claims That Require Priority Processing</p> <ul style="list-style-type: none"> Part of reviewing the work of the Claims Assistant requires checking whether the claim is a special claim that requires priority processing. Special claims are flashed through the Intake Processing Center (IPC) and indicated in MAP-D, SHARE, and VBMS. If you discover a claim that is not flagged through IPC, but should be, flag or correct the claim for special processing. 	<p>DISPLAY slide 8. "Claims That Require Priority Processing"</p>  <p>REFER trainees to CPKM and have them locate and read the following sections:</p> <ul style="list-style-type: none"> M21-1 III.ii.1.D (Claims That Require Priority Processing) <ul style="list-style-type: none"> Topics 1-6 M21-1 III.iii.1.D.1.b (Claimant Flashes) <p>INSTRUCT the trainees that they will be given 10 minutes to review each topic. When time is up, choose a trainee to summarize each of the sections listed. Choose a different trainee for each topic/section.</p> <p>DISCUSS and ensure understanding of the special types of claims and claimant flashes.</p>
<p>Flash a Claim</p> <ul style="list-style-type: none"> MAP-D SHARE VBMS 	<p>DISPLAY slide 9. "Flash a Claim"</p> <p>EXPLAIN that if a claim was flashed incorrectly, or a flash is missing, the PMC VSR will have to flash the claim.</p>  <p>DEMONSTRATE how to flash a claim in MAP-D.</p> <p>DEMONSTRATE how to flash a claim in SHARE.</p> <p>DEMONSTRATE how to flash a claim in VBMS.</p> <p>REMINDE trainees to use the Pension Systems and Applications job aid for a refresher of each system and its purpose.</p>




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PowerPoint Slides	Instructor Activities
<p>Group Practice Exercise— Does the Claim Require Priority Processing?</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide trainees into two groups. ○ Each group will receive claim information: <ul style="list-style-type: none"> ▪ Group 1: Claim 1 ▪ Group 2: Claim 2 ○ Access CPKM to use the M21-1 to complete the exercise. ○ Provide each group with a demo claim. ○ Have each group review the claim and determine if the claim requires priority processing. • Time allowed: 5 min. 	<p>DISPLAY slide 10. “Group Practice Exercise—Does the Claim Require Priority Processing?”</p> <p>DIVIDE trainees into two groups.</p> <p>ASSIGN each group an example claim:</p> <ul style="list-style-type: none"> • Group 1: Claim 1 • Group 2: Claim 2  <p>REFER trainees to CPKM and have them locate and read the following section: M21-1 III.ii.1.D (Claims That Require Priority Processing)</p> <p>INSTRUCT trainees to review the types of claims that require priority processing. Based on the information given in the manual, request that each group determine:</p> <ul style="list-style-type: none"> • If the claim is a special claim that requires priority processing • If it is considered a special claim, why the claim requires priority processing
<p>Group Practice Exercise— Does the Claim Require Priority Processing? Answers</p> <p><i>Answers provided by instructor based on example claims selected.</i></p>	<p>DISPLAY slide 11. “Group Practice Exercise—Does the Claim Require Priority Processing? Answers”</p> <p>REVIEW with trainees the types of special claims listed in M21-1 III.ii.1.D (Claims That Require Priority Processing).</p> <p>DISCUSS each claim and the attributes that make it a special claim or not a special claim, and discuss why the claim would or would not require priority processing.</p>



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PowerPoint Slides	Instructor Activities
<p>Reviewing Other Types of Claims</p> <ul style="list-style-type: none">• Along with priority claims, you will also review the following types of claims:<ul style="list-style-type: none">○ Previous claim○ Dual claim (rare)○ Reopened/new claim• These claims involve reviewing various systems/applications, depending on the information needed.	<p>DISPLAY slide 12. "Reviewing Other Types of Claims"</p> <p>INTRODUCE trainees the other types of claims that they will review from the Claims Assistant:</p> <ul style="list-style-type: none">• Previous claim• Dual claim• Reopened/new claim <p>EXPLAIN briefly the claim types listed and explain that the trainees will learn about these claim types in more detail in a later lesson.</p>



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PowerPoint Slides	Instructor Activities
<p>Original Claim was Previously Established (Previous Claim)</p> <ul style="list-style-type: none"> • SHARE <ul style="list-style-type: none"> ○ In the Corporate screen, review the information found in Claims and Denial and/or Award and Ratings to check if an original end product (EP) was previously processed or if the beneficiary is currently receiving benefits. • BIRLS <ul style="list-style-type: none"> ○ Review the Inactive Comp and Pension (ICP) screen for Veteran awards. • VBMS <ul style="list-style-type: none"> ○ Review VBMS to check if the claim was previously submitted or information was previously submitted. 	<p>DISPLAY slide 13. "Original Claim was Previously Established"</p>  <p>DEMONSTRATE in SHARE where the trainees would look to check if an original claim was previously established:</p> <ul style="list-style-type: none"> • Corporate screen <ul style="list-style-type: none"> ○ Claims and Denials ○ Awards ○ Ratings <p>EXPLAIN that the trainees will check to see if an original EP was previously processed or if the beneficiary is currently receiving benefits.</p>  <p>DEMONSTRATE in BIRLS where the trainees would look to check if an original claim was previously established:</p> <ul style="list-style-type: none"> • ICP screen <ul style="list-style-type: none"> ○ Veteran awards  <p>DEMONSTRATE in VBMS where the trainees would check to see if an original claim was previously established:</p> <ul style="list-style-type: none"> • Search VBMS to check if the claim was previously submitted or if information pertaining to the claim was previously submitted



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<p>Original Claim Had Prior Decision (Previous Claim)</p> <ul style="list-style-type: none"> • To check if an original claim had a prior decision: <ul style="list-style-type: none"> ○ Review the claims folder (if paper). ○ Look for a notification letter, award print, or claim information in VBMS. ○ Review the Corporate screen in SHARE under Claims and Denials or Awards. 	<p>DISPLAY slide 14. "Original Claim Had Prior Decision"</p> <p align="center"></p> <p>DEMONSTRATE in VBMS where the trainees would check to see if an original claim had a prior decision:</p> <ul style="list-style-type: none"> • Notification letter • Award Print <p align="center"></p> <p>DEMONSTRATE in SHARE where the trainees would look to check if an original claim had a prior decision:</p> <ul style="list-style-type: none"> • Corporate screen <ul style="list-style-type: none"> ○ Claims and Denials ○ Awards





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<p>Dual Claims</p> <ul style="list-style-type: none">• Dual claims are claims that are developed for pension and compensation benefits.• Dual claims are indicated in SHARE or VBMS.	<p>DISPLAY slide 15. "Dual Claims"</p> <p></p> <p>DEMONSTRATE in VBMS where the trainees would find indications that a claim is a dual claim.</p> <p></p> <p>DEMONSTRATE in SHARE where the trainees would find indications that a claim is a dual claim.</p> <p>EXPLAIN that dual claims are generally handled by Compensation.</p>


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<p>New and Material Evidence (Reopened or New Claim)</p> <ul style="list-style-type: none"> • For a reopened/new claim, check for new and material evidence. • Review evidence to ensure it is not a duplication of information already on record, and refer for a rating if applicable. 	<p>DISPLAY slide 16. "New and Material Evidence (Reopened or New Claim)"</p>  <p>REFER to M21-1 II.iv.2.B.3.d (New and Material Evidence) for the definition of new and material evidence. Choose a trainee to read the definition out loud.</p> <p>SHOW examples of new and material evidence using Claim 3:</p> <ul style="list-style-type: none"> • Written and sworn testimony of the claimant or witnesses to an event • Lay statement from a friend or family member • Medical nexus opinion with supporting rationale  <p>DEMONSTRATE where to check for new and material evidence in:</p> <ul style="list-style-type: none"> • SHARE • MAP-D • VVA • VBMS

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<p>An Appeal Is Pending</p> <ul style="list-style-type: none"> • Check if an appeal is pending for a claim by: <ul style="list-style-type: none"> ○ Reviewing SHARE for an EP 170 code (series pending) ○ Checking VACOLS ○ Reviewing information associated with claim in VVA or VBMS 	<p>DISPLAY slide 17. "An Appeal is Pending"</p> <p></p> <p>DEMONSTRATE in SHARE using example claim information where the trainees would find the EP 170 code indicating an appeal is pending.</p> <p></p> <p>DEMONSTRATE in VACOLS where the trainees would find information regarding a pending appeal for a claim.</p> <p></p> <p>DEMONSTRATE in VVA and VBMS where the trainees would find information regarding a pending appeal for a claim.</p> <p></p> <p>REFER to M21-1 I.5.A.2.b (Overview of the Appeal Process) for an overview of the appeal process and the Pension Systems and Applications job aid for more information in VACOLS.</p>

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PowerPoint Slides	Instructor Activities
<p>Practice Exercise—Claim 4, 5, and 6</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide trainees into three groups. ○ Each group will receive claim information: <ul style="list-style-type: none"> ▪ Group 1: Claim 4 ▪ Group 2: Claim 5 ▪ Group 3: Claim 6 ○ Instruct each group to perform a review on the claim, checking if the claim is a previous claim, dual claim, new/reopened claim, and if the claim has an appeal pending. ○ Select one person in each group to present their findings. • Time allowed: 10 min. 	<p>DISPLAY slide 18. “Practice Exercise— Claim 4, 5, and 6”</p> <p>DIVIDE trainees into three groups.</p> <p>ASSIGN each group an example claim:</p> <ul style="list-style-type: none"> • Group 1: Claim 4 • Group 2: Claim 5 • Group 3: Claim 6 <p>DIRECT trainees to answer the questions in the worksheet for each claim.</p>  <p>REFER to the M21-1 for guidance while reviewing the claim and the Pension Systems and Applications job aid.</p>

Practice Special Claims Worksheet

For each claim, answer the questions below. Include references to the M21-1 and sections of the claim in your explanations.

Claim 4

1. Is the claim a previously established claim?
 - *Answers provided by instructor based on example claims used.*

2. Is the claim a dual claim?
 - *Answers provided by instructor based on example claims used.*

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3. Does the claim contain new and material evidence indicating it is a new/reopened claim?
 - *Answers provided by instructor based on example claims used.*

4. Does the claim information indicate that an appeal is pending?
 - *Answers provided by instructor based on example claims used.*

Claim 5

1. Is the claim a previously established claim?
 - *Answers provided by instructor based on example claims used.*

2. Is the claim a dual claim?
 - *Answers provided by instructor based on example claims used.*

3. Does the claim contain new and material evidence indicating it is a new/reopened claim?
 - *Answers provided by instructor based on example claims used.*

4. Does the claim information indicate that an appeal was pending?
 - *Answers provided by instructor based on example claims used.*

Claim 6

1. Is the claim a previously established claim?
 - *Answers provided by instructor based on example claims used.*


2. Is the claim a dual claim?
 - *Answers provided by instructor based on example claims used.*

3. Does the claim contain new and material evidence indicating it is a new/reopened claim?



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- *Answers provided by instructor based on example claims used.*

- 4. Does the claim information indicate that an appeal is pending?
- *Answers provided by instructor based on example claims used.*

PowerPoint Slides	Instructor Activities
<p>Practice Exercise—Demo Claim Answers</p> <ul style="list-style-type: none"> • Is the claim a previously established claim? <ul style="list-style-type: none"> ○ <i>Answers provided by instructor based on example claims used.</i> • Is the claim a dual claim? <ul style="list-style-type: none"> ○ <i>Answers provided by instructor based on example claims used.</i> • Does the claim contain new and material evidence indicating it was a new/reopened claim? <ul style="list-style-type: none"> ○ <i>Answers provided by instructor based on example claims used.</i> • Does the claim information indicate that an appeal was pending? <ul style="list-style-type: none"> ○ <i>Answers provided by instructor based on example claims used.</i> 	<p>DISPLAY slide 19. "Practice Exercise—Demo Claim Answers"</p> <p>INSTRUCT a trainee from each group to present their findings on Claim 4, 5, and 6.</p> <p>PROVIDE any clarification or explanation needed based on the findings for each group.</p> <div style="text-align: center;">  </div> <p>ASK the trainees if they have any questions about Claim 4, 5, and 6. Focus on the conclusions that were reached for each claim.</p>
<p>Lesson Summary</p> <p>Key concepts of this lesson:</p> <ul style="list-style-type: none"> • Confirm the special claim 	<p>DISPLAY slide 20. "Lesson Summary"</p> <p>REVIEW the key concepts of this lesson:</p>

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PowerPoint Slides	Instructor Activities
<p>types.</p> <ul style="list-style-type: none"> • Correct the special claim types. • Check whether an original claim was previously established. • Check whether the original claim had a prior decision. • Check whether evidence is new and material evidence. 	<ul style="list-style-type: none"> • Confirm the special claim types. • Correct the special claim types. • Check whether an original claim was previously established. • Check whether the original claim had a prior decision. • Check whether evidence is new and material evidence.
<p>Questions?</p> 	<p>DISPLAY slide 21. "Questions?"</p>  <p>ASK trainees if there are any concepts that are unclear or may need further review.</p> <p>REMINDE trainees to use and review the following sections of the M21-1:</p> <ul style="list-style-type: none"> • M21-1 III.ii.1.D (Claims That Require Priority Processing) • M21-1 III.iii.1.D.1.b (Claimant Flashes) • M21-1 II.iv.2.B.3.d (New and Material Evidence) • M21-1 I.5.A.2.b (Overview of the Appeal Process)
<p>What's Next</p> <ul style="list-style-type: none"> • Phase 5, Part 1, Lesson 4: Date of Claim • Review of all job aids and references provided in this lesson. 	<p>DISPLAY slide 22. "What's Next"</p> <p>DISCUSS the upcoming lesson with trainees.</p> <p>EMPHASIZE that they review all previous lessons, job aids, and references if needed.</p>