Pension and fiduciary service

PMC VSR Core Course

Phase 4: Introduction to Pension Management

Phase 4 Knowledge Check Preparation

Lesson Plan

February 2020

Phase 4: Knowledge Check Preparation

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 1.5 hours |
| Purpose of the Knowledge Check preparation: | This Knowledge Check preparation is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this Knowledge Check preparation is to get PMC VSRs ready to take the Phase 4 Knowledge Check. |
| Prerequisite Training Requirements: | Prior to taking the Phase 4 Knowledge Check Preparation, trainees must complete PMC VSR Core Course Phases 1–3. (Refer to the **Master Course Map** learning aid for a list of lessons.) |
| Target Audience: | This Knowledge Check preparation is for entry-level PMC VSRs. |
| References: | * **Master Course Map** learning aid * M21-1 III.ii.1 (Initial Screening Process) * M21-1 V.iii.1.A (General Information on the Effect Income and Net Worth Have on Pension and Parents DIC) * M21-1 III.v.2.A (Decision Authorization) * M21-1 III.v.2.B (Decision Notices) * M21-1 III (General Claims Process) * CPKM * **Claim Types** job aid * **Locating and Updating a Claimant Record** job aid |
| Technical Competencies: | * Processing Claims (PMC VSR) * VBA Applications (PMC VSR) |
| Knowledge Check: | Phase 4: Introduction to Pension Management Knowledge Check |
| What You Need: | * Lesson Plan * **Master Course Map** learning aid * Appendix A * Appendix A Answer Key * Access to the following job aids from VSR Assistant:   + **Claim Types** job aid   + **Locating and Updating a Claimant Record** job aid * Slides * Projector * Access to CPKM * Access to VSR Assistant |

Instructor Notes

This Knowledge Check preparation will provide trainees with a refresher of the topics covered in Phase 4: Introduction to Pension Management. This will include a review of all lesson objectives, participation in activities to reinforce their understanding, and a question and answer forum to address any misconceptions and provide additional clarification about the information presented.

| PowerPoint Slides | Instructor Activities | |
| --- | --- | --- |
| Phase 4: Knowledge Check Preparation | **DISPLAY** slide  “Phase 4: Knowledge Check Preparation”  **INTRODUCE** yourself as the instructor.  **INTRODUCE** the Knowledge Check preparation. | |
| Why It Matters!   * **Phase 4 provides:**   + **High-level overview of the stages of a claim**   + **Various types of claims they will encounter in training and on the job**   + **Means of managing those claims (records)** * These broad concepts provide structure for the rules and procedures that will be learned in Phases 5 and 6 | **DISPLAY** slide **2.** “Why It Matters!”  **REMIND** trainees the purpose of Phase 4. Focus on the following:   * **Phase 4 provides:**   + **High-level overview of the stages of a claim**   + **Various types of claims they will encounter in training and on the job**   + **Means of managing those claims (records)**   **EXPLAIN that these** broad concepts provide structure for the rules and procedures that will be learned in phases 5 and 6. | |
| ****Phase 4 Lessons****  Phase 4 consists of the following three lessons:   1. Stages of a Pension Claim 2. Types of Pension Claims and Claims Recognition 3. Pension Claims eFolder/Records Management | **DISPLAY** slide **3.** “Phase 4 Lessons”  **REMIND** trainees that Phase 4 consists of the following three lessons:   1. Stages of a Pension Claim 2. Types of Pension Claims and Claims Recognition 3. Pension Claims eFolder/Records Management |
| VA Stages of a Pension Claim   * **Understanding the stages of a pension claim will help you efficiently and effectively process pension claims** | **DISPLAY** slide **4.** “VA Stages of a Pension Claim”  **TRANSITION to the first lesson in Phase 4: VA Stages of a Pension Claim**  **REMIND trainees of the five stages of a claim:**   1. Initial Screening 2. Claim Development 3. Ready for Decision (if applicable) 4. Award Determination/Promulgation 5. Claimant Notification |
| VA Stages of a Pension Claim Objectives   * **Describe the stages of a pension claim**    + **Describe the purpose for initial screening and determining eligibility**   + **Describe the purpose of claims development and duty to assist**   + **Describe the purpose of referring a claim to the rating activity**   + **Describe the purpose of award determination and promulgation**   + **Describe the purpose of claimant notification** | **DISPLAY** slide **5.** “VA Stages of a Pension Claim Objectives”  **PRESENT the objectives for the lesson.**  **ALLOW about 5–7 minutes to review these objectives.** |
| Partner Activity—What’s the Question?   * Instructions:   + Divide into pairs.   + Complete Part A of Appendix A: Phase 4 Worksheet.   + Take turns giving the answer and selecting the correct questions.   + Be prepared to share your finished activity with the class. * Time allowed: 7–10 minutes | **DISPLAY** slide **6.** “Partner Activity—What’s the Question?”  **DIVIDE trainees into groups of two.**  **DIRECT trainees to complete Part A of Appendix A: Phase 4 Worksheet by selecting the correct question based on the answer given.**  **TELL the pairs to take turns** giving the answer and selecting the correct questions.  **NOTE: this activity is in the style of a game show where trainees answer in the form of a question.**  **ALLOW 7**–**10 minutes to complete this activity.**  **SHOW the answers from Part A of Appendix A Answer Key** |
| Types of Pension Claims and Claims Recognition   * To be a successful PMC VSR, you need to recognize that there are a variety of claim types * Failing to recognize characteristics of various claims causes time-consuming and benefit-affecting errors such as:   + Processing the claim incorrectly   + Failure to recognize that the claim requires a rating decision | **DISPLAY** slide **7.** “Types of Pension Claims and Claims Recognition”  **TRANSITION to the second lesson in Phase 4:** Types of Pension Claims and Claims Recognition**.**  **EXPLAIN the consequences of failing to recognize key characteristics in a claim.** |
| Types of Pension Claims and Claims Recognition Objectives   * Recognize the most common types of PMC VSR claims:   + Recognize the characteristics of each claim type   + Identify the correct forms or other correspondence of each claim type | **DISPLAY** slide **8.** “Types of Pension Claims and Claims Recognition Objectives ”  **PRESENT the objectives for the lesson.**  **ALLOW about 5 minutes to review these objectives.** |
| Individual Activity—Know the Claim Type   * Instructions:   + Complete Part B of Appendix A: Phase 4 Worksheet.   + Match the definition with the correct claim type.   + Use the **Claim Types** job aid.   + Be prepared to share your finished activity with other trainees. * Time allowed: 10 minutes | **DISPLAY** slide **9.** “Individual Activity—Know the Claim Type”  **EXPLAIN to trainees that this is an individual activity.**  **DIRECT trainees to complete Part B of Appendix A: Phase 4 Worksheet by:**   * **Matching the definition with the correct claim type** * **Using the Claim Types job aid**   **ALLOW 10 minutes to complete this activity.**  **SHOW the answers from Part B of Appendix A Answer Key** |
| Pension Claims eFolder/Records Management   * One of your duties as a PMC VSR involves locating and updating records in the:   + eFolder   + Corporate record   + Claimant record * These records must be tracked and updated to ensure that the:   + Claimant is receiving the benefits entitled   + PMC VSR has the evidence needed to justify claim decisions | **DISPLAY** slide **10.** “Pension Claims eFolder/Records Management”  **TRANSITION to the third lesson in Phase 4: Pension Claims eFolder/Records Management**  **REMIND trainees that maintaining claimant records is a crucial part of the job because the claimant record is used to justify claim decisions and determine claimant benefits.**  Title: Reference Icon - Description: This icon indicates you should emphasize the important point.  **EMPHASIZE that records management includes:**   * eFolder * Corporate record * Claimant record |
| Pension Claims eFolder/Records Management Objectives   * Locate information in a record * Update records when errors are identified * Address lost claims | **DISPLAY** slide **11.** “Pension Claims eFolder/Records Management Objectives”  **PRESENT the objectives for the lesson.**  **ALLOW about 5 minutes to review these objectives.** |
| Partner Activity—Update the Record   * Instructions:   + Divide into pairs.   + Complete Part C of Appendix A: Phase 4 Worksheet.   + Read each scenario.   + Answer questions about updating the claimant’s record.   + Be prepared to share your finished activity with the class. * Time allowed: 10 minutes | **DISPLAY** slide **12.** “Partner Activity—Update the Record”  **DIVIDE trainees into groups of two.**  **NOTE: trainees have the option to go back to their previous partners or choose a new partner.**  **DIRECT trainees to complete Part C of Appendix A: Phase 4 Worksheet by:**   * **Reading each scenario** * Answering questions about updating the claimant’s record * **Using the Locating and Updating a Claimant Record** job aid   **ALLOW 10 minutes to complete this activity.**  **SHOW the answers from Part C of Appendix A Answer Key** |
| Question and Answer Clarification  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. | **DISPLAY** slide **13.** “Question and Answer Clarification”  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK** if they have any questions or concerns regarding Phase 4. Use this time to clear up any confusion or misconceptions about the information presented. |
| **What’s Next?**  Phase 4: Introduction to Pension Management Knowledge Check | **DISPLAY** slide **14.** “What’s Next?”  **DISCUSS** the upcoming Phase 4: Introduction to Pension Management Knowledge Check  **REMIND** trainees to use the job aids and resources provided in the Knowledge Check to help answer the questions. |