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
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| Technical Competencies: | * Processing Claims (PMC VSR)
* VBA Applications (PMC VSR)
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| 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
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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 ClarificationThis 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.  |