



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 4: Introduction to Pension
Management

Phase 4 Knowledge Check Preparation

Lesson Plan

September 28, 2016

Version 1.0

**Phase 4 Knowledge Check Preparation
Lesson Plan**

Phase 4: Knowledge Check Preparation

Lesson Overview

Topic	Description
Time Estimate:	1.5 hour
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 1–4. (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.

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Topic	Description
References:	<ul style="list-style-type: none"> • 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) • 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) • M27-1 I.7 (Freedom of Information Act [FOIA] and Privacy Act [PA]) • 38 CFR 14.630 (Authorization for a particular claim) • VA Accreditation Search • CPKM • Claim Types job aid • Locating and Updating a Claimant Record job aid • Lost Claims Checklist job aid • Provide Benefit Information job aid
Technical Competencies:	<ul style="list-style-type: none"> • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)
Knowledge Check:	Phase 4: Introduction to Pension Management Knowledge Check

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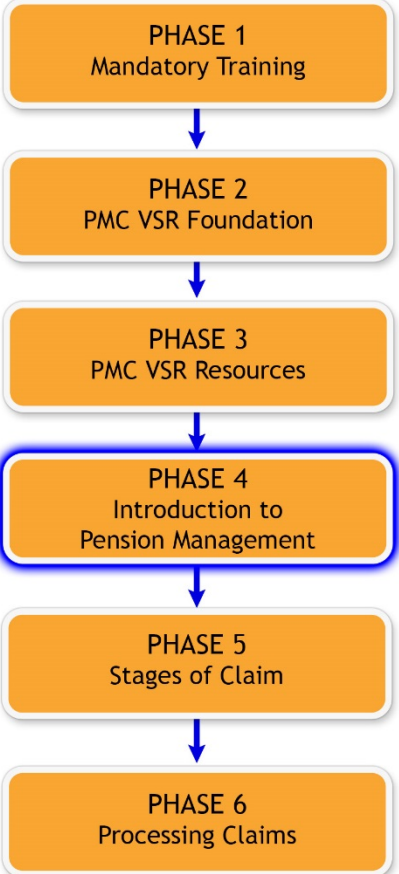

Topic	Description
What You Need:	<ul style="list-style-type: none"> • Lesson Plan • Master Course Map learning aid • Appendix A and B • Access to the following job aids from VSR Assistant: <ul style="list-style-type: none"> ○ Claim Types job aid ○ Locating and Updating a Claimant Record job aid ○ Lost Claims Checklist job aid ○ Provide Benefit Information 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	<p>DISPLAY slide</p> <p>1. "Phase 4: Knowledge Check Preparation"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the Knowledge Check preparation.</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];</pre>	<p>DISPLAY slide 2. "You Are Here"</p>  <p>REFER to the PMC VSR Master Course Map learning aid.</p> <p>DESCRIBE the diagram.</p> <p>INFORM trainees that Knowledge Check preparation will assist them in successfully completing the Phase 4 Knowledge Check.</p>

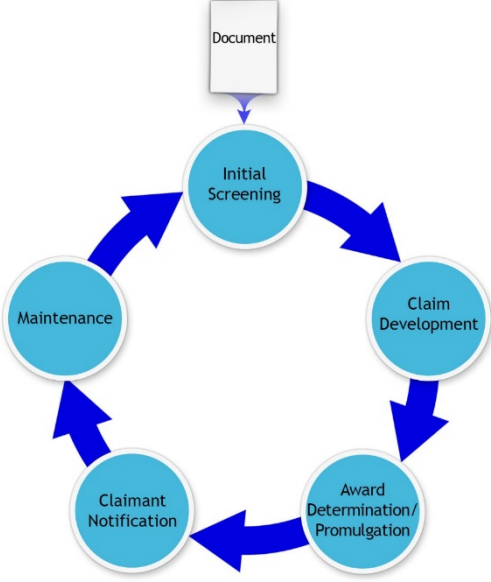
**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Why It Matters!</p> <ul style="list-style-type: none"> • Phase 4 provides: <ul style="list-style-type: none"> ○ High-level overview of the stages of a claim ○ Various 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 	<p>DISPLAY slide 3. "Why It Matters!"</p> <p>REMIND trainees the purpose of Phase 4. Focus on the following:</p> <ul style="list-style-type: none"> • Phase 4 provides: <ul style="list-style-type: none"> ○ 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) <p>EXPLAIN that these broad concepts provide structure for the rules and procedures that will be learned in phases 5 and 6.</p>
<p>Knowledge Check</p> <pre> graph TD P1[PHASE 1 Mandatory Training] --> K1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> K2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> K3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> K4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> K5{Multiple Knowledge Check} P5 --> P6[PHASE 6 Processing Claims] P6 --> K6{Multiple Knowledge Check} </pre>	<p>DISPLAY slide 4. "Knowledge Check"</p> <p>INFORM trainees that they will be assessed on this content in the Phase 4: Introduction to Pension Management Knowledge Check.</p> <p>EXPLAIN that the Phase 4 Knowledge Check will assess the following lessons:</p> <ol style="list-style-type: none"> 1. Stages of a Pension Claim 2. Types of Pension Claims and Claims Recognition 3. Pension Claims eFolder/Records Management 4. Provide Benefit Information <p>REMIND trainees that all the lessons included on the Knowledge Check are also listed on the POI.</p>

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Knowledge Check Preparation Overview</p> <p>This Knowledge Check preparation will consist of the following:</p> <ul style="list-style-type: none"> • Lesson objectives review • Partner activity • Question/answer forum 	<p>DISPLAY slide</p> <p>5. "Knowledge Check Preparation Overview"</p> <p>EXPLAIN that this Knowledge Check preparation will consist of a review of the learning objectives for each lesson in Phase 4, followed by an activity or game to help reinforce their understanding of those objectives.</p> <p style="text-align: center;"></p> <p>REFER trainees to Appendix A: Phase 4 Worksheet.</p> <p>INFORM trainees that in order to save time for all activities, there will be time at the end of this Knowledge Check preparation for questions to be discussed.</p> <p style="text-align: center;"></p> <p>REFER trainees to Appendix B: Phase 4 Question and Answer Worksheet.</p>
<p>Phase 4 Lessons</p> <p>Phase 4 consists of the following four lessons:</p> <ol style="list-style-type: none"> 1. Stages of a Pension Claim 2. Types of Pension Claims and Claims Recognition 3. Pension Claims eFolder/Records Management 4. Provide Benefit Information 	<p>DISPLAY slide</p> <p>6. "Phase 4 Lessons"</p> <p>REMINDE trainees that Phase 4 consists of the following four lessons:</p> <ol style="list-style-type: none"> 1. Stages of a Pension Claim 2. Types of Pension Claims and Claims Recognition 3. Pension Claims eFolder/Records Management 4. Provide Benefit Information

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>VA Stages of a Pension Claim</p> <ul style="list-style-type: none">Understanding the stages of a pension claim will help you efficiently and effectively process pension claims  <pre>graph TD; Document[Document] --> IS((Initial Screening)); IS --> CD((Claim Development)); CD --> ADP((Award Determination/Promulgation)); ADP --> CN((Claimant Notification)); CN --> M((Maintenance)); M --> IS;</pre>	<p>DISPLAY slide 7. "VA Stages of a Pension Claim"</p> <p>TRANSITION to the first lesson in Phase 4: VA Stages of a Pension Claim</p> <p>REMIND trainees of the five stages of a claim:</p> <ol style="list-style-type: none">1. Initial Screening2. Claim Development3. Award Determination/Promulgation4. Claimant Notification5. Maintenance

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>VA Stages of a Pension Claim Objectives</p> <ul style="list-style-type: none"> • Describe the stages of a pension claim <ul style="list-style-type: none"> ○ Describe the purpose for initial screening and determining eligibility ○ Describe the purpose of claims development and duty to assist ○ Describe the purpose of award determination and promulgation ○ Describe the purpose of claimant notification ○ Describe the purpose of claim maintenance 	<p>DISPLAY slide 8. “VA Stages of a Pension Claim Objectives”</p> <p>PRESENT the objectives for the lesson.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>Partner Activity—What’s the Question?</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ 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 	<p>DISPLAY slide 9. “Partner Activity—What’s the Question?”</p> <p>DIVIDE trainees into groups of two.</p> <p>DIRECT trainees to complete Part A of Appendix A: Phase 4 Worksheet by selecting the correct question based on the answer given.</p> <p>TELL the pairs to take turns giving the answer and selecting the correct questions.</p> <p>NOTE: this activity is in the style of a game show where trainees answer in the form of a question.</p> <p>ALLOW 7–10 minutes to complete this activity.</p>


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PowerPoint Slides	Instructor Activities
<p>Partner—What’s the Question? Answers (1 of 2)</p> <ol style="list-style-type: none">1. This stage is for reviewing all incoming applications, correspondence, and evidence to determine if a claim warrants priority processing because of its nature or facts.<ol style="list-style-type: none">a. <i>What is Initial Screening stage?</i>2. This stage addresses all issues pertaining to a single claim by denying benefits when entitlement does not exist.<ol style="list-style-type: none">c. <i>What is Award Determination/Promulgation stage?</i>3. This stage makes the appropriate award adjustments following changes to income subsequent to the original claim.<ol style="list-style-type: none">e. <i>What is Maintenance?</i>4. This stage provides the claimant with full knowledge of the decision made and his/her rights pertaining to that decision.<ol style="list-style-type: none">d. <i>What is Claimant Notification stage?</i>	<p>DISPLAY slide 10. “Partner Activity—What’s the Question? Answers (1 of 2)”</p> <p>PROVIDE the correct answers for this activity.</p>

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Partner—What’s the Question? Answers (2 of 2)</p> <p>5. This stage address all issues pertaining to a single claim by awarding benefits when entitlement exists.</p> <p style="padding-left: 40px;"><i>c. What is Award Determination/Promulgation stage?</i></p> <p>6. This stage assists claimants in obtaining evidence to substantiate the claim before VA makes a decision.</p> <p style="padding-left: 40px;"><i>b. What is Claim Development stage?</i></p> <p>7. This stage reviews all evidence to determine if an immediate denial is warranted.</p> <p style="padding-left: 40px;"><i>a. What is Initial Screening stage?</i></p>	<p>DISPLAY slide</p> <p>11. “Partner Activity—What’s the Question? Answers (2 of 2)”</p> <p>PROVIDE the correct answers for this activity.</p>

**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>VA Stages of a Pension Claim Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix B: Phase 4 Question and Answer Worksheet to write any questions regarding VA stages of a pension claim. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 12. “VA Stages of a Pension Claim Question Writing Opportunity”</p> <p>INFORM trainees that before you transition to the next lesson for review, this will be the opportunity to capture any questions they had regarding VA stages of a pension claim.</p>  <p>REFER trainees to Appendix B: Phase 4 Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions or concerns that they have regarding stages of a claim on the question and answer worksheet.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>
<p>Types of Pension Claims and Claims Recognition</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ○ Processing the claim incorrectly ○ Failure to recognize that the claim requires a rating decision 	<p>DISPLAY slide 13. “Types of Pension Claims and Claims Recognition”</p> <p>TRANSITION to the second lesson in Phase 4: Types of Pension Claims and Claims Recognition.</p> <p>EXPLAIN the consequences of failing to recognize key characteristics in a claim.</p>


**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Types of Pension Claims and Claims Recognition Objectives</p> <ul style="list-style-type: none"> • Recognize the most common types of PMC VSR claims: <ul style="list-style-type: none"> ○ Recognize the characteristics of each claim type ○ Identify the correct forms or other correspondence of each claim type 	<p>DISPLAY slide</p> <p>14. "Types of Pension Claims and Claims Recognition Objectives "</p> <p>PRESENT the objectives for the lesson.</p> <p>ALLOW about 5 minutes to review these objectives.</p>
<p>Individual Activity—Know the Claim Type</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ 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 	<p>DISPLAY slide</p> <p>15. "Individual Activity—Know the Claim Type"</p> <p>EXPLAIN to trainees that this is an individual activity.</p> <p>DIRECT trainees to complete Part B of Appendix A: Phase 4 Worksheet by:</p> <ul style="list-style-type: none"> • Matching the definition with the correct claim type • Using the Claim Types job aid <p>ALLOW 10 minutes to complete this activity.</p>


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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Know the Claim Answers (1 of 2)</p> <ol style="list-style-type: none">1. A monetary benefit payable to a low-income, un-remarried surviving spouse and/or unmarried children of a deceased Veteran with wartime service.<ul style="list-style-type: none">○ <i>Survivors Pension</i>2. A one-time benefit in which a surviving spouse may receive pension or DIC for the last month that the Veteran was entitled to before death.<ul style="list-style-type: none">○ <i>Month of Death (MOD)</i>3. An additional monetary benefit for Veterans and survivors who are eligible for pension benefits and who are housebound. VA Form 21-2680 is associated with this claim type.<ul style="list-style-type: none">○ <i>Special Monthly Pension (SMP)</i>	<p>DISPLAY slide</p> <p>16. "Partner Activity—Know the Claim Answers (1 of 2)"</p> <p>PROVIDE the answers to the activity.</p>

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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Know the Claim Answers (2 of 2)</p> <p>4. A benefit generally payable to survivors of Veterans who died from service-connected disabilities.</p> <ul style="list-style-type: none"> ○ <i>Dependency and Indemnity Compensation (DIC)</i> <p>5. A monetary benefit payable to low-income wartime Veterans. Also referred to as live or new pension.</p> <ul style="list-style-type: none"> ○ <i>Veteran's Pension</i> <p>6. A record received by VA matching programs that indicates a contradiction or mandated review, which requires action by a PMC VSR.</p> <ul style="list-style-type: none"> ○ <i>800 Series Work Item</i> 	<p>DISPLAY slide</p> <p>17. "Partner Activity—Know the Claim Answers (2 of 2)"</p> <p>PROVIDE the answers to the activity.</p>
<p>Pension Claim Types Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix B: Phase 4 Question and Answer Worksheet to write any questions regarding types of pension claims. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide</p> <p>18. "Pension Claim Question Types Writing Opportunity"</p> <p>REMIND trainees that at this time, they can capture any questions they have regarding types of pension claims.</p>  <p>REFER trainees to Appendix B: Phase 4 Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions on the worksheet.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>

**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Pension Claims eFolder/Records Management</p> <ul style="list-style-type: none"> • One of your duties as a PMC VSR involves locating and updating records in the: <ul style="list-style-type: none"> ○ eFolder ○ Corporate record ○ Claimant record • These records must be tracked and updated to ensure that the: <ul style="list-style-type: none"> ○ Claimant is receiving the benefits entitled ○ PMC VSR has the evidence needed to justify claim decisions 	<p>DISPLAY slide 19. "Pension Claims eFolder/Records Management"</p> <p>TRANSITION to the third lesson in Phase 4: Pension Claims eFolder/Records Management</p> <p>REMINDE 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.</p> <p style="text-align: center;"></p> <p>EMPHASIZE that records management includes:</p> <ul style="list-style-type: none"> • eFolder • Corporate record • Claimant record
<p>Pension Claims eFolder/Records Management 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 20. "Pension Claims eFolder/Records Management Objectives"</p> <p>PRESENT the objectives for the lesson.</p> <p>ALLOW about 5 minutes to review these objectives.</p>


**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Update the Record</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ 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 	<p>DISPLAY slide 21. “Partner Activity—Update the Record”</p> <p>DIVIDE trainees into groups of two.</p> <p>NOTE: trainees have the option to go back to their previous partners or choose a new partner.</p> <p>DIRECT trainees to complete Part C of Appendix A: Phase 4 Worksheet by:</p> <ul style="list-style-type: none"> • Reading each scenario • Answering questions about updating the claimant’s record • Using the Locating and Updating a Claimant Record job aid <p>ALLOW 10 minutes to complete this activity.</p>


**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Update the Record Answers (1 of 2)</p> <p>Scenario 1:</p> <ul style="list-style-type: none"> • What system will you need to access to perform the SSA inquiry? <ul style="list-style-type: none"> ○ <i>VVA or SHARE</i> • What information do you need to access the eFolder to begin the inquiry? <ul style="list-style-type: none"> ○ <i>SSN or file number</i> <p>Scenario 2:</p> <ul style="list-style-type: none"> • What system(s) will you need to access to upload VA Form 27-0820? (Select all that apply) <ul style="list-style-type: none"> a. <i>VBMS</i> c. <i>VVA</i> • Where in the system would you find this VA form once uploaded? <ul style="list-style-type: none"> ○ eFolder 	<p>DISPLAY slide</p> <p>22. "Partner Activity—Update the Record Answers (1 of 2)"</p> <p>PROVIDE the answers to the first and second scenarios in this activity.</p>

**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Update the Record Answers (2 of 2)</p> <p>Scenario 3:</p> <ul style="list-style-type: none"> • What system will you need to access to update the direct deposit information? <ul style="list-style-type: none"> ○ SHARE • Where in the system do you update the direct deposit information? <ul style="list-style-type: none"> ○ Change of Address or Direct Deposit (CADD) 	<p>DISPLAY slide</p> <p>23. “Partner Activity—Update the Record Answers (2 of 2)”</p> <p>PROVIDE the answers to the third scenario in this activity.</p>
<p>Pension Claims Records Management Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix B: Phase 4 Question and Answer Worksheet to write any questions regarding pension claims. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide</p> <p>24. “Pension Claims Records Management Question Writing Opportunity”</p> <p>REMIND trainees that at this time, they can capture any questions they have regarding pension claims.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix B: Phase 4 Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions on the worksheet.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>

**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Provide Benefit Information</p> <ul style="list-style-type: none"> • Verifying the caller is extremely important when you receive a request for benefits because 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 because the caller may not be authorized to receive all benefit information 	<p>DISPLAY slide 25. "Provide Benefit Information"</p> <p>TRANSITION to the fourth lesson in Phase 4: Provide Benefit Information.</p>  <p>REFER trainees to the Provide Benefit Information job aid.</p> <p>REMIND trainees of some common errors when providing benefit information:</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>Provide Benefit Information 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 (Report of General Information) 	<p>DISPLAY slide 26. "Provide Benefit Information Objectives"</p> <p>PRESENT the objectives for the lesson.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>

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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Think It Through</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Work with a partner. ○ Complete Part D of Appendix A: Phase 4 Worksheet using the Provide Benefit Information job aid. ○ Read each scenario and determine: <ul style="list-style-type: none"> ▪ Type of caller ▪ Information needed to verify the caller ▪ Type of information that can be provided to the caller ○ Be prepared to share your finished activity with the class. • Time allowed: 10 minutes 	<p>DISPLAY slide 27. “Partner Activity—Think It Through”</p> <p>DIVIDE trainees into groups of two.</p> <p>NOTE: trainees have the option to go back to their previous partners or choose a new partner.</p> <p>DIRECT trainees to complete Part D of Appendix A: Phase 4 Worksheet by:</p> <ul style="list-style-type: none"> • Reading each scenario • Using the Provide Benefit Information job aid to determine: <ul style="list-style-type: none"> ○ Type of caller ○ Information needed to verify the caller ○ Type of information that can be provided to the caller <p>ALLOW 10 minutes to complete this activity.</p>


**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Think It Through Answers (1 of 3)</p> <p>Scenario 1:</p> <ul style="list-style-type: none"> • Type of caller: <i>Authorized third party</i> • Information needed to verify caller: Caller was able to verify the security question under box 11 on the VA Form 21-0845 in addition to the ID protocol • Type of information that can be provided to the caller: <ul style="list-style-type: none"> ○ <i>Permitted to disclose specifics about the claim</i> ○ <i>Cannot take information from the caller as a first party to adjust benefits</i> 	<p>DISPLAY slide 28. “Partner Activity—Think It Through (1 of 3)”</p> <p>PROVIDE answers for first scenario of this activity.</p>
<p>Partner Activity—Think It Through Answers (2 of 3)</p> <p>Scenario 2:</p> <ul style="list-style-type: none"> • Type of caller: <i>Veteran (first party)</i> • Information needed to verify caller: <ul style="list-style-type: none"> ○ <i>Full name</i> ○ <i>SSN</i> ○ <i>Date of birth</i> • Type of information that can be provided to the caller: <ul style="list-style-type: none"> ○ <i>May disclose the status of the original pension claim</i> 	<p>DISPLAY slide 29. “Partner Activity—Think It Through (2 of 3)”</p> <p>PROVIDE answers for the second scenario of this activity.</p>



**Phase 4 Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Think It Through Answers (3 of 3)</p> <p>Scenario 3:</p> <ul style="list-style-type: none"> • Type of caller: <i>VSO Representative (Third Party)</i> • Information needed to verify caller: <ul style="list-style-type: none"> ○ <i>VA Form 21-22 designating Jan Scott as POA</i> ○ <i>POA showing in system</i> ○ <i>VA Form 21-0845 completed</i> • Type of information that can be provided to the caller: <ul style="list-style-type: none"> ○ <i>The caller is only permitted to receive information pertaining to the current monthly amount of any benefit because this is public information</i> ○ <i>Any other information must be requested from the Veteran or an authorized third party</i> 	<p>DISPLAY slide 30. "Partner Activity—Think It Through (3 of 3)"</p> <p>PROVIDE answers for the third scenario in the activity.</p>

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Provide Benefit Information Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix B: Phase 4 Question and Answer Worksheet to write any questions regarding benefit information. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 31. "Provide Benefit Information Question Writing Opportunity"</p> <p>REMIND trainees that at this time they can capture any questions they have regarding the benefit information.</p>  <p>REFER trainees to Appendix B: Phase 4 Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions on the question and answer sheet.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>
<p>Question and Answer Forum</p> <ul style="list-style-type: none"> • Instructions <ul style="list-style-type: none"> ○ Divide into groups of three or four. ○ Review the Appendix B: Phase 4 Question and Answer Worksheet with your group. ○ Mark any questions that need further clarification from the instructor. • Time allowed: 7–10 minutes 	<p>DISPLAY slide 32. "Question and Answer Forum"</p> <p>DIVIDE trainees into groups of three or four.</p> <p>DIRECT trainees to review with their group any questions that they had written down on the Appendix B: Phase 4 Question and Answer Worksheet</p> <p>INFORM trainees to mark any questions that need further clarification from the instructor.</p> <p>ALLOW 7–10 minutes for this forum.</p>

**Phase 4 Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Question and Answer Clarification</p> 	<p>DISPLAY slide 33. "Question and Answer Clarification"</p>  <p>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.</p>
<p>What's Next?</p> <p>Phase 4: Introduction to Pension Management Knowledge Check</p>	<p>DISPLAY slide 34. "What's Next?"</p> <p>DISCUSS the upcoming Phase 4: Introduction to Pension Management Knowledge Check</p> <p>REMIND trainees to use the job aids and resources provided in the Knowledge Check to help answer the questions.</p>