



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5, Part 1(a): Initial Screening
and Claim Establishment

Phase 5, Part 1(a) Knowledge Check Preparation

Lesson Plan

October 28, 2016

Version 1.0

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

Phase 5, Part 1(a) Knowledge Check Preparation

Lesson Overview

Topic	Description
Time Estimate:	2 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 prepare PMC VSRs to take the Phase 5, Part 1(a) Knowledge Check.
Prerequisite Training Requirements:	Prior to taking the Phase 5, Part 1(a) Knowledge Check Preparation, trainees must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1(a), lessons 1-7. (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.
Preparation References:	<ul style="list-style-type: none"> • Claim Types job aid • End Product (EP) Codes job aid • Modifying End Product (EP) Codes job aid • Old Law and Section 306 Pension Programs job aid • Compensation and Pension Knowledge Management (CPKM) • M21-1 I.1.B (Duty to Notify Under 38 U.S.C. 5102 and 5103) • M21-1 III.ii.2.B (Applications for Disability Compensation and/or Pension) • M21-1 III.ii.2.C (Informal Claims Received Prior to March 24, 2015, Communication of an Intent to File [ITF], and Requests for an Application) • 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) • M21-1 III.i.3.A (General Information About the Fully

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Topic	Description
	<p>Developed Claim [FDC] Program)</p> <ul style="list-style-type: none"> • M21-1 III.i.3.B.2 (Excluding Claims from the FDC Program) • M21-1 III.i.3.B.3 (Development the VA Undertakes in Connection with FDCs) • M21-1 III.ii.1.C (Initial Screening Policies) • M21-1 I.3.B.1.a (A Claimant's Right to Representation) • M21-1 III.ii.3.C.5.a (Updating the POA in SHARE and VBMS) • M21-1 III.ii.2.D.1.b (Definition: Reopened Claim) • M21-1 III.ii.2.F.1.a (Definition: Request for Reconsideration) • M21-1 V.iii.1.C (Section 306 Pension and Old Law Pension) • M21-1 V.iii.5.1.c (When the Right of Continued Entitlement to Old Law or Section 306 Pension Is Not Protected) • M21-1 V.iii.5.1.d (Changing a Beneficiary's Benefit Type) • M21-1 V.iii.5.2.b (Action to Take When an Election Is Not in the Claimant's Interest) • M21-1 III.ii.3.D (Claims Establishment) • M21-4 Appendix C (End Product Codes and Work-Rate Standards for Quantitative Measurements) • M21-4 Appendix C (End Product Codes and Work-Rate Standards for Quantitative Measurements) • M21-4 Appendix C (Index of Claim Attributes) • 38 CFR 3.103(a) (Procedural due process and appellate rights) • 38 CFR 14.630 (Authorization for a particular claim)
Technical Competencies	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)
Knowledge Check	Phase 5, Part 1(a): Initial Screening and Claim Establishment Knowledge Check

**Phase 5, Part 1(a) Knowledge Check Preparation
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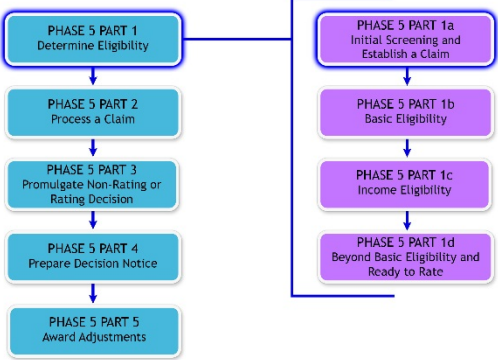

Topic	Description
What You Need:	<ul style="list-style-type: none"> • Lesson Plan • Appendix A: Example Claim • Appendix B: Knowledge Check Preparation Worksheet • Appendix C: Question and Answer Worksheet • Access to VSR Assistant for: <ul style="list-style-type: none"> ○ Claim Types job aid ○ End Product (EP) Codes job aid ○ Modifying End Product (EP) Codes job aid ○ Old Law and Section 306 Pension Programs job aid • Slides • Projector • Access to CPKM

Instructor Notes


This Knowledge Check preparation will provide trainees with a refresher of the topics covered in Phase 5, Part 1(a): Initial Screening and Claim Establishment. 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 5, Part 1(a): Knowledge Check Preparation	<p>DISPLAY slide</p> <p>1. "Phase 5, Part 1(a): Knowledge Check Preparation"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the Knowledge Check preparation.</p>

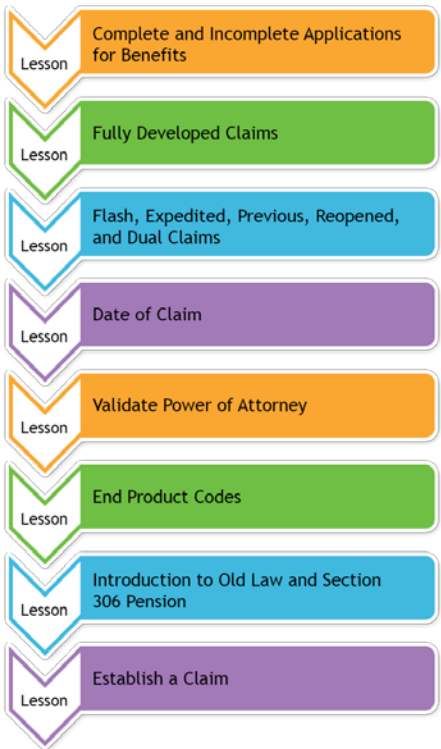
**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>You Are Here</p> 	<p>DISPLAY slide 2. “You Are Here”</p>  <p>REFER to the PMC VSR Master Course Map learning aid.</p> <p>INFORM trainees that Knowledge Check preparation will assist them in successfully completing the Phase 5, Part 1(a) Knowledge Check.</p>
<p>Why It Matters!</p> <ul style="list-style-type: none"> • Phase 5, Part 1(a) provides the fundamental claim processing rules and procedures performed most frequently • These are the building blocks to be integrated into the processing of claim types to be learned in Phase 6 	<p>DISPLAY slide 3. “Why It Matters!”</p> <p>REMIND trainees that the purpose of Phase 5, Part 1(a) is to provide the fundamental claim processing rules and procedures performed most frequently.</p> <p>EXPLAIN that these are the building blocks to be integrated into the processing of claim types to be learned in Phase 6.</p>

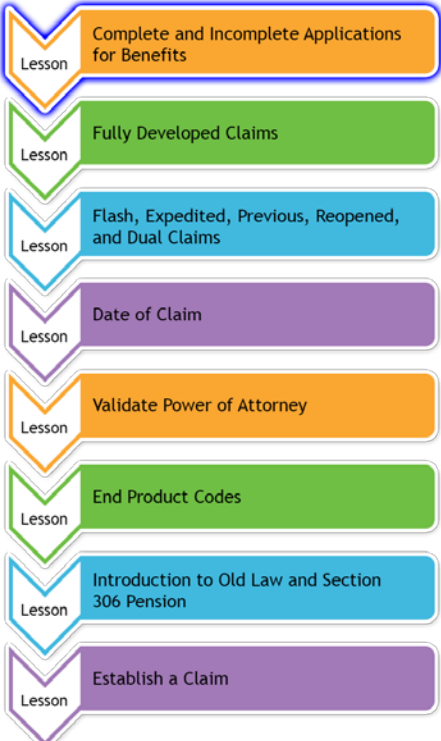
**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Knowledge Check</p> <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B{Phase 5 Part 1a Knowledge Check} A --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} C --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} E --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} </pre>	<p>DISPLAY slide 4. "Knowledge Check"</p> <p>INFORM trainees that they will be assessed on this content in the Phase 5, Part 1(a): Initial Screening and Claim Establishment Knowledge Check.</p> <p>REMINDE trainees that all the lessons included on the Knowledge Check are also listed on the POI.</p>
<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 Activities • Question/Answer Forum 	<p>DISPLAY slide 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 5, Part 1(a). This is followed by an activity to help reinforce their understanding of those objectives.</p> <p>INFORM trainees that in order to save time for the activities, there will be time at the end of this Knowledge Check preparation for questions to be discussed.</p>  <p>REFER trainees to Appendix C: Question and Answer Worksheet.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Phase 5, Part 1(a) Lessons</p> <p style="text-align: center;">Phase 5, Part 1(a)</p>  <ul style="list-style-type: none">Lesson Complete and Incomplete Applications for BenefitsLesson Fully Developed ClaimsLesson Flash, Expedited, Previous, Reopened, and Dual ClaimsLesson Date of ClaimLesson Validate Power of AttorneyLesson End Product CodesLesson Introduction to Old Law and Section 306 PensionLesson Establish a Claim	<p>DISPLAY slide</p> <p>6. "Phase 5, Part 1(a) Lessons"</p> <p>REMIND trainees that Phase 5, Part 1(a) consists of the following eight lessons:</p> <ol style="list-style-type: none">1. Complete and Incomplete Applications for Benefits2. Fully Developed Claims3. Flash, Expedited, Previous, Reopened, and Dual Claims4. Date of Claim5. Validate Power of Attorney6. End Product Codes7. Introduction to Old Law and Section 306 Pension8. Establish a Claim


**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Complete and Incomplete Applications for Benefits</p> <ul style="list-style-type: none"> During the initial screening process, the PMC VSR verifies whether the Claims Assistant (CA) has processed the initial screening correctly and evaluates other aspects of the claim Recognizing whether the application for benefits is complete or incomplete is important so that VA can grant entitlement to benefits in a timely manner <div style="text-align: center;"> <p>Phase 5, Part 1(a)</p>  </div>	<p>DISPLAY slide 7. "Complete and Incomplete Applications for Benefits"</p> <p>TRANSITION to the first lesson in Phase 5, Part 1(a): Complete and Incomplete Applications for Benefits</p> <p>REMIND trainees that during the initial screening process, the PMC VSR verifies whether the Claims Assistant (CA) has processed the initial screening correctly and evaluates other aspects of the claim.</p> <p>INFORM trainees that recognizing whether the application for benefits is complete or incomplete is important so that VA can grant entitlement to benefits in a timely manner.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Complete and Incomplete Applications for Benefits Objectives</p> <ul style="list-style-type: none">• Determine whether the application for benefits is complete or incomplete.<ul style="list-style-type: none">○ Recognize the requirements for a formal claim received prior to March 24, 2015.○ Recognize the requirements for an informal claim received prior to March 24, 2015.○ Recognize the requirements for a completed claim received on or after March 24, 2015.○ Recognize the requirements for an Intent To File (ITF) received on or after March 24, 2015.○ Recognize the requirements for a Request For Application (RFA) received on or after March 24, 2015.	<p>DISPLAY slide 8. "Complete and Incomplete Applications for Benefits Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>


**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Complete and Incomplete Applications for Benefits Question Writing Opportunity</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Use Appendix C: Question and Answer Worksheet to write any questions regarding complete and incomplete applications for benefits○ Questions will be answered at the end of the Knowledge Check preparation• Time allowed: 5 minutes	<p>DISPLAY slide 9. "Complete and Incomplete Applications for Benefits Question Writing Opportunity"</p> <p>INFORM trainees that before transitioning to the next lesson for review, they will have the opportunity to capture any questions they had regarding incomplete applications for benefits.</p>  <p>REFER trainees to Appendix C: Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions or concerns that they have regarding incomplete applications for benefits.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Fully Developed Claims</p> <ul style="list-style-type: none"> • Purpose of the Fully Developed Claim (FDC) Program is to reduce the backlog of pending claims and to improve claims-processing timeliness • FDC program requires claimants to submit their claim on specific forms <div style="text-align: center;"> <p>Phase 5, Part 1(a)</p> </div>	<p>DISPLAY slide 10. “Fully Developed Claims”</p> <p>TRANSITION to the second lesson in Phase 5, Part 1(a): Fully Developed Claims.</p> <p>REMIND trainees that for the purpose of the Fully Developed Claim (FDC) Program is to reduce the backlog of pending claims and to improve claims-processing timeliness.</p> <p>INFORM trainees that the FDC program requires claimants to submit their claim on the following specific forms:</p> <ul style="list-style-type: none"> • Disability compensation: VA Form 21-526EZ, Application for Disability Compensation and Related Compensation Benefits • Veterans Pension: VA Form 21-527EZ, Application for Pension • Survivors benefits: VA Form 21-534EZ, Application for DIC, Death Pension, and /or Accrued Benefits


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>FDC Objectives</p> <ul style="list-style-type: none"> • Determine if claim can be processed as an FDC. • Determine if a claim meets FDC criteria for Veteran’s nonservice-connected pension benefits. • Determine if a claim meets FDC criteria for DIC, survivors pension, and/or accrued benefits. • Determine under what circumstances a claim needing development can remain in FDC program. • Determine to exclude a claim from FDC program. 	<p>DISPLAY slide 11. “FDC Objectives ”</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>FDC Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding the FDC program ○ Questions will be answered at the end of the Knowledge Check preparation • Time allowed: 5 minutes 	<p>DISPLAY slide 12. “FDC Question Types Writing Opportunity”</p> <p>REMINDE trainees that at this time, they can capture any questions they have regarding the FDC program.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix C: 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 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Flash, Expedited, Previous, Reopened, and Dual Claims</p> <ul style="list-style-type: none"> • Some claims require special processing. The following are special claim types: <ul style="list-style-type: none"> ○ Priority ○ Previous ○ Reopened/New ○ Dual • Flashes are person-specific indicators that represent an attribute, fact, or status that is unlikely to change. <div style="text-align: center; margin-top: 10px;"> <p>Phase 5, Part 1(a)</p> </div>	<p>DISPLAY slide 13. “Flash, Expedited, Previous, Reopened, and Dual Claims”</p> <p>TRANSITION to the third lesson in Phase 5, Part 1(a): Flash, Expedited, Previous, Reopened, and Dual Claims</p> <p>REMIND trainees that some claims require special processing. The following are special claim types:</p> <ul style="list-style-type: none"> • Priority • Previous • Reopened/New • Dual <p>REVIEW the purpose of flashes. Flashes are person-specific indicators that represent an attribute, fact, or status that is unlikely to change. Flashes indicate information about a Veteran, such as military awards or pending applications.</p>


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Flash, Expedited, Previous, Reopened, and Dual Claims 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 14. "Flash, Expedited, Previous, Reopened, and Dual Claims Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>Flash, Expedited, Previous, Reopened, and Dual Claims Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding special claim types. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 15. "Flash, Expedited, Previous, Reopened, and Dual Claims Question Writing Opportunity"</p> <p>REMIND trainees that at this time, they can capture any questions they have regarding special claim types.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix C: 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>

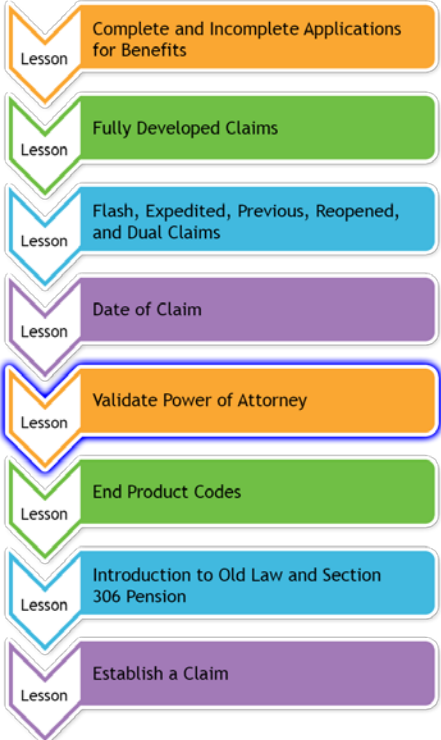
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PowerPoint Slides	Instructor Activities
<p>Date of Claim</p> <p>The Date Of Claim (DOC):</p> <ul style="list-style-type: none"> • Assists in determining the effective date of an award • Will govern subsequent action for following applications: <ul style="list-style-type: none"> ○ Informal ○ Intent To File (ITF) ○ Request For Application (RFA) <div style="text-align: center; margin-top: 10px;"> <p>Phase 5, Part 1(a)</p> </div>	<p>DISPLAY slide 16. "Date of Claim"</p> <p>TRANSITION to the fourth lesson in Phase 5, Part 1(a): Date of Claim.</p> <p>REMIND trainees the importance of properly identifying the Date Of Claim (DOC) and making sure that it is entered correctly in VBA applications.</p> <p>REVIEW that the DOC:</p> <ul style="list-style-type: none"> • Assists in determining the effective date of an award • Will govern subsequent action for informal, Intent To File (ITF), or Request For Application (RFA) applications


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Date of Claim Objectives</p> <ul style="list-style-type: none"> • Confirm that DOC is correct. <ul style="list-style-type: none"> ○ Define a DOC. ○ Identify the date of receipt. ○ Recognize exceptions to DOC. ○ Determine if the DOC is correct. 	<p>DISPLAY slide 17. "Date of Claim Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5 minutes to review these objectives.</p>
<p>Date of Claim Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding the DOC ○ Questions will be answered at the end of the Knowledge Check preparation • Time allowed: 5 minutes 	<p>DISPLAY slide 18. "Date of Claim Question Writing Opportunity"</p> <p>REMINDE trainees that at this time they can capture any questions they have regarding the DOC.</p>  <p>REFER trainees to Appendix C: 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>

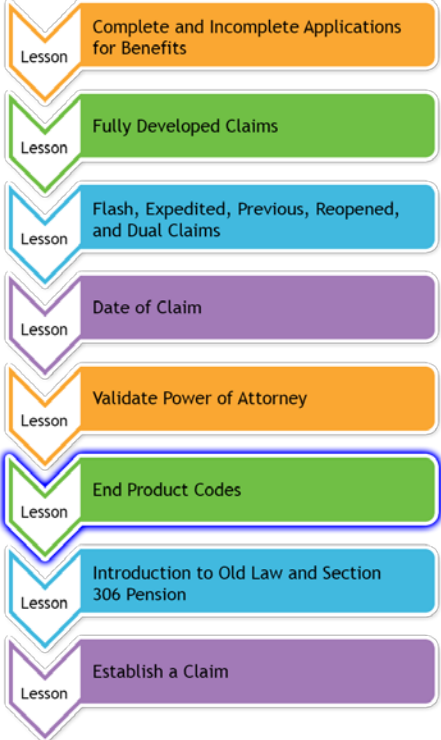


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Validate Power Of Attorney (POA)</p> <ul style="list-style-type: none"> • Accredited POAs <ul style="list-style-type: none"> ○ Service Organization Representative ○ Claims Agent ○ Attorney • Non-licensed POAs <ul style="list-style-type: none"> ○ Anyone who is listed on VA Form 21-22 and who has not been recognized by VA's Office of General Council (OGC) as accredited <p style="text-align: center;">Phase 5, Part 1(a)</p> 	<p>DISPLAY slide 19. "Validate Power Of Attorney (POA)"</p> <p>TRANSITION to the fifth lesson in Phase 5, Part 1(a): Validate Power of Attorney.</p> <p>REMINd trainees that there are accredited and non-licensed POAs.</p> <p>REVIEW that if a claimant appoints a new representative, then the current requested POA on VA Form 21-22 (Appointment of Veterans Service Organization as Claimant's Representative) needs to be updated in SHARE.</p>


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PowerPoint Slides	Instructor Activities
<p>Validate POA Objectives</p> <ul style="list-style-type: none"> • Validate Power of Attorney. <ul style="list-style-type: none"> ○ Define POA. ○ Determine POA action required. ○ Determine to grant one-time representation. ○ Modify SHARE with correct POA information. 	<p>DISPLAY slide 20. "Validate POA Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5 minutes to review these objectives.</p>
<p>Validate POA Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding validating POA. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 21. "Validate POA Question Writing Opportunity"</p> <p>REMINDE trainees that at this time they can capture any questions they have regarding the validating POA.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix C: 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>

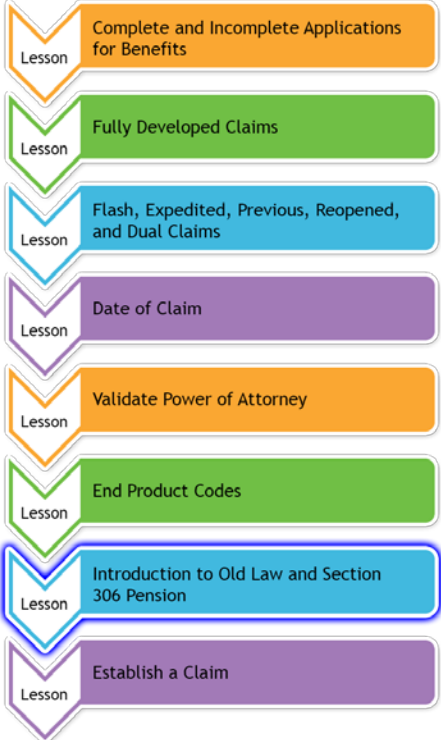


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>End Product (EP) Codes</p> <ul style="list-style-type: none"> • EP codes are three-digit numbers. • Each claim is established with an EP code. • EP codes are part of the EP system, which is the primary workload monitoring and management tool. • Modifying an EP code involves using the PIF change (PCHG) function in SHARE. <p style="text-align: center;">Phase 5, Part 1(a)</p> 	<p>DISPLAY slide 22. “End Product (EP) Codes”</p> <p>TRANSITION to the sixth lesson in Phase 5, Part 1(a): End Product Codes.</p> <p>REMIND trainees of the importance of properly identifying the EP code and making sure that the EP is entered correctly in VBA applications.</p> <p>REVIEW that an EP is a three-digit code that facilitates proper control of pending workloads and appropriate work measurement credit. With few exceptions, the EP should remain pending until all required actions on the claim have been completed.</p>  <p>REFER to the EP Codes and Modify EP Code Process job aids.</p>  <p>EMPHASIZE that once an EP code is modified in SHARE, MAP-D and VBMS will automatically be updated.</p>


**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>EP Code Objectives</p> <ul style="list-style-type: none"> • Confirm that EP is correct. <ul style="list-style-type: none"> ○ Define an EP code. ○ Verify the EP code matches the type of claim. ○ Verify the correct EP code is used in SHARE, MAP-D, and VBMS. • Modify the EP code under Pending Issue File (PIF) change (PCHG). 	<p>DISPLAY slide 23. “EP Code Objectives”</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>EP Code Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding EP codes. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 24. “EP Code Question Writing Opportunity”</p> <p>REMINDE trainees that at this time they can capture any questions they have regarding EP codes.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix C: Question and Answer Worksheet.</p> <p>DIRECT trainees to write any questions on the question and answer worksheet.</p> <p>ALLOW 5 minutes to complete this opportunity.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Introduction to Old Law and Section 306 Pension</p> <ul style="list-style-type: none"> • These types of claims are rare. • Entitlement to these pension programs is restricted to beneficiaries who were continuously entitled to receive benefits from the dates on which the programs were phased out until the present. • Section 306 and Old Law beneficiaries continue to receive the rates to which they were entitled on their respective phase-out dates. <p style="text-align: center;">Phase 5, Part 1(a)</p> 	<p>DISPLAY slide 25. "Introduction to Old Law and Section 306 Pension"</p> <p>TRANSITION to the seventh lesson in Phase 5, Part 1(a): Introduction to Old Law and Section 306 Pension.</p> <p>REMIND trainees that Old Law and Section 306 Pension claims are rare.</p>  <p>EMPHASIZE that these pensions have been phased out and can only be continued if a beneficiary is currently receiving entitlement for Old Law or Section 306 pension. These rates are fixed and cannot be adjusted unless the beneficiary reports a countable income change that will terminate benefits. Benefits cannot be reduced based on income but can be terminated.</p>  <p>REFER to Old Law and Section 306 Pension Programs job aid.</p>

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PowerPoint Slides	Instructor Activities
<p>Introduction to Old Law and Section 306 Pension Objectives</p> <ul style="list-style-type: none"> • Recognize an Old Law or Section 306 pension claim. • Describe the characteristics of Old Law pension. • Describe the characteristics of Section 306 pension. 	<p>DISPLAY slide 26. "Introduction to Old Law and Section 306 Pension Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>Old Law and Section 306 Pension Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding Old Law and Section 306 pension ○ Questions will be answered at the end of the Knowledge Check preparation • Time allowed: 5 minutes 	<p>DISPLAY slide 27. "Old Law and Section 306 Pension Question Writing Opportunity"</p> <p>REMIND trainees that at this time they can capture any questions they have regarding Old Law and Section 306 Pension.</p>  <p>REFER trainees to Appendix C: 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>

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PowerPoint Slides	Instructor Activities
<p>Partner Activity—Initial Screening</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into pairs. ○ Review example claim in Appendix A: Example Claim. ○ Complete Part A of Appendix B: Knowledge Check Preparation Worksheet. ○ Use the job aids to help answer the questions. ○ Be prepared to share your finished activity with the class. • Time allowed: 20–25 minutes 	<p>DISPLAY slide 28. “Partner Activity—Initial Screening”</p> <p>DIVIDE trainees into groups of two.</p> <p>DIRECT trainees to:</p> <ul style="list-style-type: none"> • Review example claim in Appendix A: Example Claim • Complete Part A of Appendix B: Knowledge Check Preparation Worksheet by answering the questions using the example claim and job aids • Use the following job aids from the VSR Assistant: <ul style="list-style-type: none"> ○ Claim Types job aid ○ End Product (EP) Codes job aid ○ Old Law and Section 306 Pension Programs job aid <p>ALLOW 20–25 minutes to complete this activity.</p>

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Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Partner Activity—Initial Screening Answers (1 of 4)</p> <p>1. Is the application dated before or after 3/24/2015?</p> <ul style="list-style-type: none">○ <i>ITF is dated 3/30/2015</i>○ <i>VA Form 21-526 is dated 1/8/2016</i> <p>2. Is the application substantially complete? Provide the rationale for your decision.</p> <ul style="list-style-type: none">○ <i>Yes, the claim is substantially complete because it has the following:</i><ul style="list-style-type: none">▪ <i>Sufficient service information for the VA to verify the Veteran's service</i>▪ <i>Benefit claimed</i>▪ <i>Signature of the claimant</i>▪ <i>Statement of income for Veterans Pension</i>	<p>DISPLAY slide 29. "Partner Activity—Initial Screening Answers (1 of 4)"</p> <p>PROVIDE the answers for questions 1–2.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Partner Activity—Initial Screening Answers (2 of 4)</p> <p>3. Does this claim meet the requirements of a FDC program? Provide the rationale for your decision.</p> <ul style="list-style-type: none">○ <i>No, the claim is not on an "EZ" VA Form</i> <p>4. Does this claim meet the requirement for special processing (e.g., Priority, Flashes, Dual, Reopened)? Provide the rationale for your decision.</p> <ul style="list-style-type: none">○ <i>Yes, a Flash should be used because Veteran was a POW</i> <p>5. Does this claim meet the characteristics of an Old Law pension? Provide the rationale for your decision.</p> <ul style="list-style-type: none">○ <i>No, this claim is for current law pension</i>	<p>DISPLAY slide 30. "Partner Activity—Initial Screening Answers (2 of 4)"</p> <p>PROVIDE the answers for questions 3–5.</p>

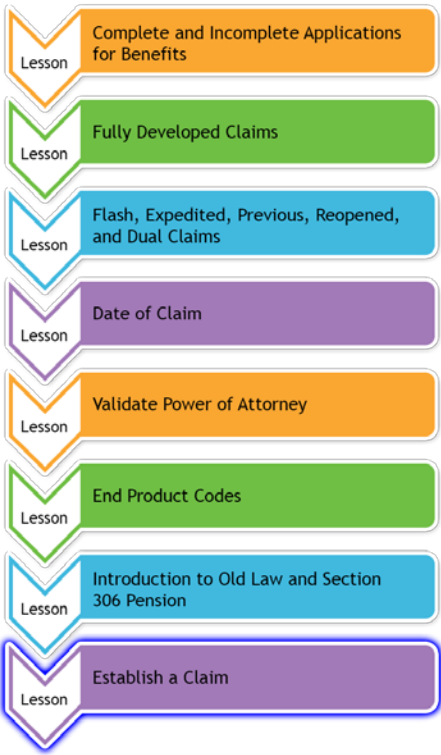
**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Partner Activity—Initial Screening Answers (3 of 4)</p> <p>6. What is the DOC for this claim? Provide the rationale for your decision.</p> <ul style="list-style-type: none">○ <i>DOC for the claim is 1/8/2016</i>○ <i>The ITF is dated 3/30/2015; however, the DOC is the date VA Form 21-526 was completed: 1/8/2016</i> <p>7. Determine if the DOC is correct in SHARE. Provide rationale for your decision.</p> <ul style="list-style-type: none">○ <i>Yes, the DOC in SHARE matches the DOC on VA Form 21-526</i>	<p>DISPLAY slide</p> <p>31. "Partner Activity—Initial Screening Answers (3 of 4)"</p> <p>PROVIDE the answers for questions 6–7.</p>


**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Partner Activity—Initial Screening Answers (4 of 4)</p> <p>8. Using the example claim and End Product (EP) Code job aid, determine if the EP code is correct. Provide the rationale for your decision.</p> <ul style="list-style-type: none"> ○ <i>The EP code is not correct—should be 187</i> ○ <i>EP code 187 is for Application for Original Live Pension benefits received on VA Form 21-526</i> <p>9. Does the claimant list a POA? If POA is listed, is POA accredited. Remember to use the <u>Accreditation Search</u>.</p> <ul style="list-style-type: none"> ○ <i>Yes, the POA is an American Legion VSO</i> ○ <i>The American Legion is on VA Form 21-22 and on the Accreditation Search</i> 	<p>DISPLAY slide 32. “Partner Activity—Initial Screening Answers (4 of 4)”</p> <p>PROVIDE the answers for questions 8–9 for this activity.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Establish a Claim (CEST)</p> <ul style="list-style-type: none"> • Results in an EP code and claim label assigned to pending claims • Supports the workload monitoring and management tool for the PMC • Facilitates proper control of pending workloads and appropriate work measurement credit • Substantiates staffing requirements and productive capacity • Facilitates formulation of the annual budget submission <p style="text-align: center;">Phase 5, Part 1(a)</p> 	<p>DISPLAY slide 33. “Establish a Claim (CEST)”</p> <p>TRANSITION to the eighth lesson in Phase 5, Part 1(a): Establish a Claim.</p> <p>REMINd trainees about the importance of claims establishment for workload monitoring and management:</p> <ul style="list-style-type: none"> • CESTing creates a control for a pending claim and results in an EP code and claim label assigned to that claim. • EP code and claim label system is the primary workload monitoring and management tool for the PMC. • Correct use of the EP system facilitates proper control of pending workloads and appropriate work measurement credit. • Correct work measurement is essential to substantiate proper staffing requirements and determine productive capacity. • Received and completed EP codes are also used to formulate the annual budget submission to the Secretary, Office of Management and Budget (OMB), the President, and Congress.



**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<p>Establish a Claim Objectives</p> <ul style="list-style-type: none"> • Establish a claim (CEST). <ul style="list-style-type: none"> ○ Recognize common EPs a PMC VSR will CEST. ○ Select the correct system in which to CEST the claim. ○ Complete the CEST process in SHARE. 	<p>DISPLAY slide 34. "Establish a Claim Objectives"</p> <p>PRESENT the objectives.</p> <p>ALLOW about 5–7 minutes to review these objectives.</p>
<p>CESTing Question Writing Opportunity</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Use Appendix C: Question and Answer Worksheet to write any questions regarding CESTing. ○ Questions will be answered at the end of the Knowledge Check preparation. • Time allowed: 5 minutes 	<p>DISPLAY slide 35. "CESTing Question Writing Opportunity"</p> <p>REMIND trainees that at this time they can capture any questions they have regarding CESTing.</p> <div style="text-align: center;">  </div> <p>REFER trainees to Appendix C: 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>

**Phase 5, Part 1(a) Knowledge Check Preparation
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PowerPoint Slides	Instructor Activities
<p>Partner Activity—CESTing</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into pairs. ○ Review example claim in Appendix A: Example Claim. ○ Complete Part B of Appendix B: Knowledge Check Preparation Worksheet: <ul style="list-style-type: none"> ▪ Review the SHARE screens. ▪ Determine if the claim has been established. ○ Be prepared to share your finished activity with the class. • Time allowed: 5–7 minutes 	<p>DISPLAY slide 36. “Partner Activity—CESTing”</p> <p>DIVIDE trainees into pairs.</p> <p>DIRECT trainees to:</p> <ul style="list-style-type: none"> • Review example claim in Appendix A: Example Claim • Complete Part B of Appendix B: Knowledge Check Preparation Worksheet by: <ul style="list-style-type: none"> ○ Reviewing the SHARE screens ○ Determining if the claim has been established <p>ALLOW 5–7 minutes to complete this activity.</p>
<p>Partner Activity—CESTing Answers</p> <ul style="list-style-type: none"> • Use the example claim and the SHARE screens to determine if the claim has been established. Provide rationale for your decision. <ul style="list-style-type: none"> ○ <i>Yes, the claim has been established correctly</i> ○ <i>The date of establishment is 3/21/2016</i> 	<p>DISPLAY slide 37. “Partner Activity—CESTing Answers”</p> <p>PROVIDE the answers to this activity.</p>

**Phase 5, Part 1(a) Knowledge Check Preparation
Lesson Plan**

PowerPoint Slides	Instructor Activities
<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 C: Question and Answer Worksheet with your group. ○ Mark any questions that need further clarification from the instructor. • Time allowed: 10–15 minutes 	<p>DISPLAY slide 38. “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 C: Question and Answer Worksheet.</p> <p>TELL trainees to mark any questions that need further clarification from the instructor.</p> <p>ALLOW 10–15 minutes for this forum.</p>
<p>Question and Answer Clarification</p> 	<p>DISPLAY slide 39. “Question and Answer Clarification”</p>  <p>ASK if they have any questions or concerns regarding Phase 5, Part 1(a). Use this time to clear up any confusion or misconceptions about the information presented.</p>
<p>What’s Next?</p> <p>PMC VSR Phase 5, Part 1(a): Knowledge Check</p>	<p>DISPLAY slide 40. “What’s Next?”</p> <p>DISCUSS the upcoming PMC VSR Phase 5, Part 1(a): Knowledge Check</p> <p>REMIND trainees to use the job aids and resources provided in the Knowledge Check to help answer the questions.</p>