



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 5: Stages of a Claim
Part 3: Promulgate a Non-rating or
Rating Decision

Lesson 1: Confirm Accuracy of a Rating Decision

Lesson Plan

February 8, 2017

Version 1.0

Lesson 1: Confirm Accuracy of a Rating Decision
Lesson Plan

Confirm Accuracy of a Rating Decision

Lesson Overview

Topic	Description
Time Estimate:	1 hour
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 review a rating decision for completion and accuracy.
Prerequisite Training Requirements:	Prior to taking the Confirm Accuracy of a Rating Decision lesson, trainees must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1 and 2.
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.v.2.A.2.c (Award Processing Responsibilities)• M21-1 III.iv.7.B.1.a (Review of Rating Decisions)• M21-1 III.iv.7.B.4.b (Handling Scheduler Revisions)• Confirm Accuracy of a Rating Decision job aid• Effective Dates EPSS job aid• Ready to Rate job aid• Pension Systems and Applications job aid
Knowledge Check:	Phase 5: Stages of a Claim, Part 3: Promulgate a Non-rating or Rating Decision
Technical Competencies:	<ul style="list-style-type: none">• Program Benefits and Eligibility (PMC VSR)• Processing Claims (PMC VSR)



Lesson 1: Confirm Accuracy of a Rating Decision
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Topic	Description
Lesson Objectives:	<ul style="list-style-type: none"> • Confirm accuracy of a rating decision. <ul style="list-style-type: none"> ○ Confirm effective date is correct. ○ Confirm information in rating decision is technically accurate. ○ Complete request for corrected rating.
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 VBA systems in academy mode: <ul style="list-style-type: none"> ○ VBMS ○ SHARE ○ BIRLS ○ VVA • Access to the following job aids from VSR Assistant: <ul style="list-style-type: none"> ○ Confirm Accuracy of a Rating Decision job aid ○ Effective Dates EPSS job aid ○ Ready to Rate job aid ○ Pension Systems and Applications job aid • Claim 1 (pmc_vsr_excerpt_y) is a rating decision showing that DIC under 38 USC 1318 was granted but RVSR failed to consider entitlement to DEA benefits • Claim 2 (pmc_vsr_excerpt_z) is a rating decision with no errors

Instructor Notes

This lesson provides trainees with references, resources, and examples to review a rating decision for completion and accuracy.

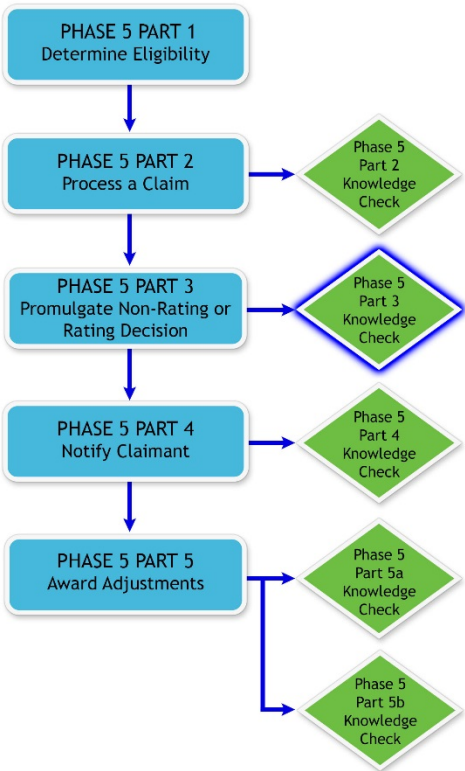

Lesson 1: Confirm Accuracy of a Rating Decision
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PowerPoint Slides	Instructor Activities
<p>Lesson 1: Confirm Accuracy of a Rating Decision</p>	<p>DISPLAY slide</p> <p>1. "Lesson 1: Confirm Accuracy of a Rating Decision"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<p>You Are Here</p>	<p>DISPLAY slide</p> <p>2. "You Are Here"</p>  <p>REFER trainees to the Master Course Map learning aid in the Trainee Guide.</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 3: Promulgate a Non-rating or Rating Decision contains two lessons. The first lesson focuses on reviewing the rating decision for accuracy, and if any errors are identified, they are addressed by the RVSR.</p>  <p>EMPHASIZE to trainees that each of these lessons relates to the one another as part of the tasks of promulgating a non-rating or rating decision.</p>



Lesson 1: Confirm Accuracy of a Rating Decision
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PowerPoint Slides	Instructor Activities
<p>Promulgate a Non-rating or Rating Decision</p> <ul style="list-style-type: none"> • Confirm Accuracy of a Rating Decision • Overview of the Award Process 	<p>DISPLAY slide</p> <p>3. "Promulgate a Non-rating or Rating Decision"</p> <p>REMINDE trainees that they just learned about processing a claim.</p> <p>EXPLAIN that they will be learning about the tasks that comprise the promulgation of a non-rating or rating decision.</p> <p>INFORM trainees that this lesson will focus on conducting a final review of the rating decision for accuracy.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> • VBA Applications (PMC VSR) • Processing Claims (PMC VSR) 	<p>DISPLAY slide</p> <p>4. "Technical Competencies"</p> <p>REVIEW technical competencies with trainees.</p>
<p>Lesson Objectives</p> <ul style="list-style-type: none"> • Confirm accuracy of a rating decision. <ul style="list-style-type: none"> ○ Confirm effective date is correct. ○ Confirm information in rating decision is technically accurate. ○ Complete request for corrected rating. 	<p>DISPLAY slide</p> <p>5. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>

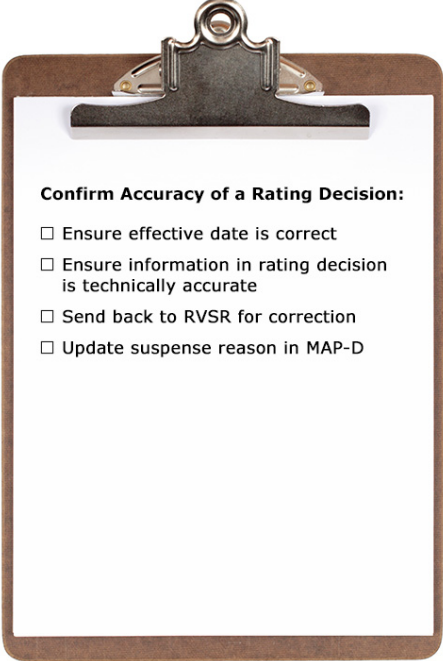

Lesson 1: Confirm Accuracy of a Rating Decision
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PowerPoint Slides	Instructor Activities
<p>Knowledge Check</p>  <pre> graph TD P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim] P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P3 --> P4[PHASE 5 PART 4 Notify Claimant] P4 --> P5[PHASE 5 PART 5 Award Adjustments] P2 --- KC2{Phase 5 Part 2 Knowledge Check} P3 --- KC3{Phase 5 Part 3 Knowledge Check} P4 --- KC4{Phase 5 Part 4 Knowledge Check} P5 --- KC5a{Phase 5 Part 5a Knowledge Check} P5 --- KC5b{Phase 5 Part 5b Knowledge Check} style KC3 stroke:#0000FF,stroke-width:2px </pre>	<p>DISPLAY slide 6. "Knowledge Check"</p> <p>EXPLAIN that a knowledge check will be given at the end of Phase 5, Part 3 that covers all material learned in Phase 5, Part 3.</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>

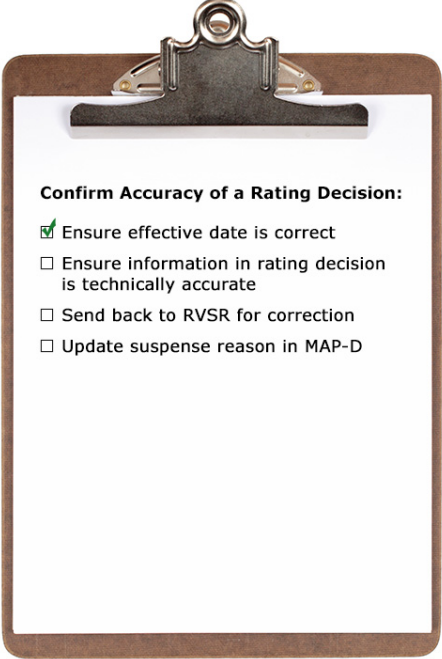



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PowerPoint Slides	Instructor Activities
<p>Why It Matters!</p> <ul style="list-style-type: none">• Last step before processing the award• Information must be correct and accurate to properly process the award	<p>DISPLAY slide 7. "Why It Matters!"</p> <p></p> <p>EMPHASIZE to trainees that this is the last task before they would process the award. If information is incorrect or missing, it will affect the benefits of the Veteran.</p> <p></p> <p>REFER to following references:</p> <ul style="list-style-type: none">• M21-1 III.v.2.A.2.c (Award Processing Responsibilities)• M21-1 III.iv.7.B.1.a (Review of Rating Decisions)• M21-1 III.iv.7.B.4.b (Handling Scheduler Revisions) <p>Give trainees a few minutes to review each reference.</p>


Lesson 1: Confirm Accuracy of a Rating Decision
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PowerPoint Slides	Instructor Activities
<p>Confirm Accuracy of a Rating Decision</p>  <p>Confirm Accuracy of a Rating Decision:</p> <ul style="list-style-type: none"><input type="checkbox"/> Ensure effective date is correct<input type="checkbox"/> Ensure information in rating decision is technically accurate<input type="checkbox"/> Send back to RVSR for correction<input type="checkbox"/> Update suspense reason in MAP-D	<p>DISPLAY slide 8. "Confirm Accuracy of a Rating Decision"</p>  <p>REFER to the Confirm Accuracy of a Rating Decision job aid.</p> <p>EXPLAIN that each item in the job aid will be explained in more detail throughout the lesson.</p>

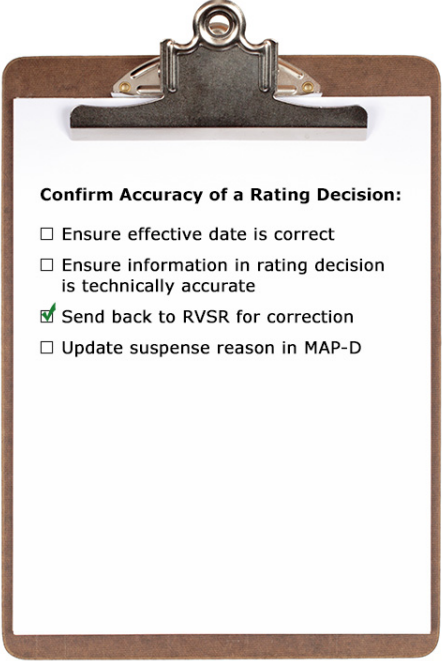
**Lesson 1: Confirm Accuracy of a Rating Decision
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PowerPoint Slides	Instructor Activities
<p>Ensure Effective Date is Correct</p> <ul style="list-style-type: none"> • Compare the effective date on the rating decision with the effective date in the claim documents and the date entered in VBMS-A. • The effective date on the rating decision may not always match the effective date in basic eligibility.  <p>Confirm Accuracy of a Rating Decision:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Ensure effective date is correct <input type="checkbox"/> Ensure information in rating decision is technically accurate <input type="checkbox"/> Send back to RVSR for correction <input type="checkbox"/> Update suspense reason in MAP-D 	<p>DISPLAY slide 9. “Ensure Effective Date is Correct”</p> <p>EXPLAIN that the effective date in the rating decision and VBMS-A should match; however, the effective date of the rating decision and basic eligibility may not always match.</p>  <p>REFER to the Effective Dates EPSS for review of how to determine the correct effective date for a claim.</p>  <p>EMPHASIZE that RVSRs are not required to list an effective date for DIC claims. If there is no effective date listed, there is no need to confirm the effective date.</p>
<p>Ensure Information in Rating Decision is Technically Accurate</p> <ul style="list-style-type: none"> • Review the rating decision for spelling/grammar errors. • Ensure the decision is consistent with rationale provided in rating decision. 	<p>DISPLAY slide 10. & 11. “Ensure Information in Rating Decision is Technically Accurate”</p>  <p>REFER to the following job aids:</p> <ul style="list-style-type: none"> • Ready to Rate • Confirm Accuracy of a Rating Decision

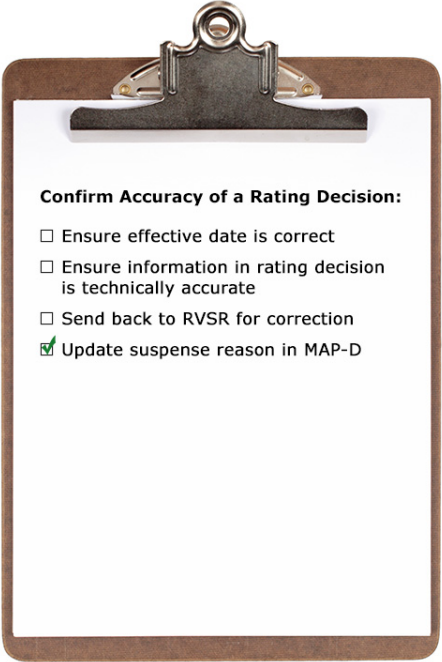


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<ul style="list-style-type: none"> • Ensure all issues are addressed: <ul style="list-style-type: none"> ○ All eligible benefits were considered. ○ Date of death is accurate. • If there is a POA, ensure the POA is indicated on the first page of the rating decision. • If death was service-connected or DIC under 38 USC 1318 was granted, ensure entitlement to Chapter 35/DEA was considered. • Verify no claim or appeal was pending at time of Veteran's death. <ul style="list-style-type: none"> ○ Refer to rating if review of accrued benefits is necessary. 	<ul style="list-style-type: none"> • Pension Systems and Applications  <p>EMPHASIZE to focus on the following:</p> <ul style="list-style-type: none"> • Rating and narrative contain no spelling or grammar errors. • Rating decision rationale is consistent with rating decision. • Issues are addressed in rating decision (i.e., all eligible benefits considered). <ul style="list-style-type: none"> ○ Review associated claim documents in VBMS. • Date of death is accurate, if applicable. <ul style="list-style-type: none"> ○ Review SHARE and BIRLS for date of death information. • POA is indicated on the first page of the rating decision, if applicable. <p>Entitlement to Chapter 35/DEA was considered if the Veteran's death was service-connected or DIC.</p>



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<p>Send Back to the RVSR for Correction</p> <ul style="list-style-type: none">• Notify the RVSR via email, phone, or in person.• Request that rating be corrected.  <p>Confirm Accuracy of a Rating Decision:</p> <ul style="list-style-type: none"><input type="checkbox"/> Ensure effective date is correct<input type="checkbox"/> Ensure information in rating decision is technically accurate<input checked="" type="checkbox"/> Send back to RVSR for correction<input type="checkbox"/> Update suspense reason in MAP-D	<p>DISPLAY slide 12. "Send Back to the RVSR for Correction"</p> <p>EXPLAIN that if the rating requires correction, you must notify the RVSR via email, phone, or in person.</p>



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<p>Update Suspense in MAP-D</p> <ul style="list-style-type: none">• Update suspense reason in MAP-D.• Wait 1-2 days for the corrected rating decision to be returned.• If no corrections are needed, continue processing the award.  <p>Confirm Accuracy of a Rating Decision:</p> <ul style="list-style-type: none"><input type="checkbox"/> Ensure effective date is correct<input type="checkbox"/> Ensure information in rating decision is technically accurate<input type="checkbox"/> Send back to RVSR for correction<input checked="" type="checkbox"/> Update suspense reason in MAP-D	<p>DISPLAY slide 13. "Update Suspense in MAP-D"</p>  <p>SHOW in MAP-D what should be entered when updating the suspense: "Interoffice Action Needed File to RVSR: Name of RVSR."</p> <p>Give the RVSR 1-2 days to correct the rating decision and return it. You will receive notification via email and/or the VOR report when the rating has been corrected.</p>  <p>EMPHASIZE that the award cannot be processed until the rating decision has been corrected and completed.</p>



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<p>Example Scenario 1—Ensure All Issues are Addressed</p> <p>You processed a claim for Dependency & Indemnity Compensation (DIC). During your review of the rating decision you see the RVSR granted service connection for the cause of death and established eligibility to Chapter 35 benefits. You review the claim documents in VBMS and discover a VA Form 21-2680 (Examination for Housebound Status or Permanent Need for Regular Aid and Attendance) was submitted with the original claim documents.</p> <p><i>The rating did not address the issue of Aid and Attendance or Housebound benefits; therefore, you would return the claim to the RVSR so that a decision can be made on all claimed issues.</i></p>	<p>DISPLAY slide 14. "Example Scenario 1—Ensure All Issues are Addressed"</p> <p>PRESENT the scenario.</p> <p></p> <p>REFER to the Confirm Accuracy of a Rating job aid to use as a reference while reviewing the scenario.</p> <p></p> <p>ASK if any clarification is needed regarding the reason the rating needed to be returned for correction.</p>


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<p>Example Scenario 2—Ensure Date of Death is Correct</p> <p>You processed a claim for survivor's pension with the aid and attendance allowance and are reviewing the rating decision completed by an RVSR. You determine the aid and attendance allowance decision is accurate; however, the date of death of the Veteran listed in the narrative is incorrect. You review SHARE and BIRLS and determine the date of death was input incorrectly into the VA system programs.</p> <p><i>You verify the date of death provided on the death certificate and perform a BIRLS update to correct the date of death. You would then forward the claim to the RVSR to correct the rating decision.</i></p>	<p>DISPLAY slide</p> <p>15. "Example Scenario 2—Ensure Date of Death is Correct"</p> <p>PRESENT the scenario.</p>  <p>REFER to the Confirm Accuracy of a Rating job aid to use as a reference while reviewing the scenario.</p>  <p>ASK if any clarification is needed regarding the reason the rating needed to be returned for correcting.</p>


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<p>Demonstration—Review the Rating Decision</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Access Claim 1 ○ Access the Confirm Accuracy of a Rating Decision job aid. ○ Follow along as the instructor reviews the rating decision for accuracy. • Time allowed: 10 minutes 	<p>DISPLAY slide 16. "Demonstration—Review the Rating Decision"</p> <p>READ the activity instructions on the slide to the trainees.</p>  <p>REFER to Confirm Accuracy of a Rating Decision job aid.</p> <p>INSTRUCT trainees to follow along with checklist in the job aid while you review the live rating decision.</p>  <p>DEMONSTRATE in VBMS, with Claim 1 what to review in the rating decision using the Confirm Accuracy of a Rating Decision job aid as your guide.</p>




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<p>Claim 2 Activity—Confirm Accuracy of a Rating Decision</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of three. ○ Access the Confirm Accuracy of a Rating Decision job aid to complete the exercise. ○ Review the Claim 2. ○ Be prepared to explain your group’s findings for each claim. • Time allowed: 10 minutes 	<p>DISPLAY slide 17. “Claim 2 Activity—Confirm Accuracy of a Rating Decision”</p> <p>DIVIDE trainees into groups of three.</p> <p>PROVIDE Claim 2 to trainees.</p> <p>READ the activity instructions on the slide to the trainees.</p>  <p>REFER to the Confirm Accuracy of a Rating Decision job aid for checklist and references pertaining to reviewing a rating decision for accuracy.</p> <p>INSTRUCT trainees to review the job aid and manual references and use the information to review the rating decisions for accuracy.</p> <p>SELECT a group to share their findings for Claim 2.</p>
<p>Claim 2 Activity—Confirm Accuracy of a Rating Decision Debrief</p> <ul style="list-style-type: none"> • Follow along as the instructor reviews the correct findings for each rating decision. • Ask for clarification on steps or actions, if needed. 	<p>DISPLAY slides 18. “Claim 2 Activity—Confirm Accuracy of a Rating Decision Debrief”</p> <p>DEBRIEF the exercise by going through each rating decision and identifying, if applicable:</p> <ul style="list-style-type: none"> • Any grammar/spelling issues • Incorrect effective dates • Claim issues that were not addressed • If the claim should be returned to the RVSR for correction
<p>Confirm Accuracy of a Rating Decision Review</p> <p>When reviewing a rating decision for accuracy:</p>	<p>DISPLAY slide 19. & 20. “Confirm Accuracy of a Rating Decision Review”</p>

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<ul style="list-style-type: none"> • Confirm information in rating decision is technically accurate. <ul style="list-style-type: none"> ○ Review the rating decision for spelling/grammar errors. ○ Ensure the decision is consistent with rationale provided in rating decision. ○ Ensure all issues are addressed. ○ If there is a POA, ensure the POA is indicated on the first page of the rating decision. ○ If death was service-connected or DIC under 38 USC 1318 was granted, ensure entitlement to Chapter 35/DEA was considered. ○ Verify no claim or appeal was pending at time of Veteran's death. • Ensure effective date is correct. <ul style="list-style-type: none"> ○ Compare with effective date entered in VBMS-A. • Complete request for corrected rating. 	<div style="text-align: center;">  </div> <p>REFER to the Confirm Accuracy of a Rating Decision job aid for the checklist and references.</p> <p>REVIEW each point on the slide and remind the trainees where the information can be found in the job aid.</p>

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<ul style="list-style-type: none"> ○ Notify the RVSR via email, phone, or in person. ○ Update suspense reason in MAP-D. 	
<p>Questions?</p> 	<p>DISPLAY slide 21. "Questions?"</p>  <p>ASK if there are any concepts that are unclear or that may need further review.</p>
<p>What's Next?</p> <ul style="list-style-type: none"> • Phase 5, Part 3, Lesson 2: Overview of the Award Process • Review all references and job aids provided in this lesson 	<p>DISPLAY slide 22. "What's Next?"</p> <p>DISCUSS the upcoming knowledge check with trainees.</p>  <p>EMPHASIZE that they should review all job aids and references associated with this lesson.</p>