



# North Carolina Department of Administration

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## **Standard Operating Procedure** **Regional Training Officer**

This Standard Operating Procedure (SOP) provides basic procedures for the daily operation of the Regional Training Officer (RTO). These procedures provide the Regional Training Officer and Training Coordinator (TC) a guide on various processes to ensure quality training and accountability of service.

### **1. Mission Statement**

The mission of the Regional Training Officer (RTO) is to develop, administer and coordinate training to all Veterans Service Officers (VSO), Veterans Service Technicians (VST), County Veterans Service Officers (CVSO) that are/will be accredited by the North Carolina Division of Veterans Affairs or working in a similar capacity. This position will also implement regional training, continuing education, and management and organizational development within the North Carolina Division of Veterans Affairs (NCDVA).

### **2. Statement of Purpose**

This Standard Operating Procedure (SOP) provides basic procedures for the daily operation of Regional Training Officers (RTO). The purpose of the RTO is to coordinate closely with the NCDVA Training Coordinator, Department of Veterans Affairs (DVA), National Veterans Service Organizations and other agencies to ensure the accuracy and consistency of training materials and information.

### **3. Authority**

Regional Training Officers will establish training requirements, identify training needs and maintain compliance with NC General Statute 165 and the NCDVA Policy Manual. North Carolina General Statute 165 provides for the establishment of the NCDVA and designated Veterans Service Centers describing the role in the representation of claimants for their lawful veterans benefits under Federal, State, local laws, rules, or regulations.

### **4. Preface**

The primary role of the RTO will be conducting in-person training, webinars, and regional training seminars as specified by training needs. The RTO will be based at a Veterans Service Center within their respective region and will assist as a VSO as needed.

### **5. Customer Service**

The RTOs are accredited representatives and considered a VSO; therefore they must always maintain the highest level of customer service. The RTO must always project a professional and courteous attitude to the client/claimant or trainee whether in person or on the telephone. However, we do not have to take abuse either on the phone or in person. If this becomes the case, the RTO will contact the Training Coordinator and/or the Regional Manager in a timely manner to report the incident.

The goal is to maintain a harmonious relationship with CVSO's, NCDVA staff, DVA personnel as well as Veterans and their family members. By working with all entities the RTO will provide the best possible training, collaboration and delivery of benefits.

#### **6. County Assistance Policy:**

NCDVA, County and Tribal VSO's across North Carolina have a long history of working together to provide our veterans the best service in the nation. The desire is for this tradition to continue far into the future. With continued mutual support, interaction and respect we *will* become the State of Choice for Veterans.

The role of the RTO will be to provide the best possible training to these individuals to ensure that it meets their needs and to maintain continuity within the established policies of claims submission.

#### **7. Training Environment**

The RTO will provide adequate space and accommodations in order to facilitate a comfortable training environment. The RTO will utilize all training aids necessary to include handouts, electronic materials or web based training. The RTO can employ VSCs, VAMCs, and NCDVA Veterans Homes for formal training sites at their discretionary authority.

#### **8. General Office Set Up:**

Each RTO will maintain a base office in a Veterans Service Center in their respective region. This office will include the following:

- a. Office Equipment:
  - 1) Desk
  - 2) Chair
  - 3) Phone
  - 4) Fax machine
  - 5) Computer Equipment
  - 6) Internet Access with VA access
  - 7) Copier
  - 8) File cabinets for hard copy file management
- b. The RTO will also be provided a projector with screen, remote internet access (i.e. hotspot), cell phone, designated vehicle and administrative rights to the State Web based training portal and Learning Management System (LMS).
- c. Office Supplies (To be provided by Service Center Office)
  - 1) Paper, pens, files, labels, etc.
  - 2) Secure data base (preferred on a remote server) for electronic file management  
*\*Need only if use electronic program, paperless office, etc.*
- d. Office Support and Resources:
  - 1) NCDVA Directory
  - 2) Medical Dictionary
  - 3) Assigned Service Center Office Staff and contact information
  - 4) Current NCDVA Training Manual
  - 5) 38 CFR and 38 USC Code Books (e-Books) on VA Benefits (specifically Book B and C).
  - 6) Support from IT Department  
*\*Electronic versions may supplement hard copies.*

#### **9. Schedule:**

The work hours are 8:00 a.m. to 5:00 p.m. Monday through Friday. In addition to normal work hours, night and weekend work will be required as needed and as directed to complete position requirements. The work schedule will be adjusted when required to meet job responsibilities and obligations.

#### **10. Proficiency Standards**

The RTO will perform a minimum of thirty (30) hours per year in an NCDVA Service Center Office assisting veterans, their dependents, and their survivors completing claims for various benefits to maintain VSO accreditation. They will also perform a minimum of ten (10) hours per year in the NCDVA State Service Office assisting State Service Officers to review VA policies and procedures. Evaluations will be conducted by the Training Coordinator; the RTO will be measured on proficiency in the areas of VA knowledge, NCDVA policy and effective training methods.

#### **11. Training Procedures**

- a. Initial VSO/VST/CVSO training introduction:
  - 1) The RTO will make initial contact when advised of a newly hired VSO/VST/CVSO. This can be accomplished via telephone conversation or in person to establish the training requirements of the individual. This will be the foundation of the training program.
  - 2) Initial training will take place at the earliest convenient time and location for both individuals. This will also be coordinated with the Regional Manager, Training Coordinator, Veterans Service Center and/or the County Manager or direct supervisor of the CVSO. The RTO will provide a copy of the NCDVA Training Manual and NCDVA Policy Manual in order to achieve an understanding of the standards required by 38 CFR 14.629.
- b. NCDVA Training Modules:

The NCDVA module training will be scheduled and conducted either in-person or through a web-based system. The location of in-person training will be established by the RTO that best serves the training needs and is within a reasonable distance to the attendees.
- c. Accreditation Exam:
  - 1) Accreditation Exams will be proctored by the Training Coordinator or by an RTO from another region to ensure consistency and compliance with NCDVA Accreditation Policy.
  - 2) Testing procedures:
    - a. The test will consist of 100 multiple-choice questions based on material presented in the training modules.
    - b. The candidate will have two hours to complete the test.
    - c. Passing score is 75%.
    - d. If the candidate fails the test, he/she may be retested a maximum of two additional times.
    - e. There will be a minimum of 90 days between tests.
    - f. If a candidate fails the test three times, he/she is ineligible for NCDVA accreditation.
    - g. Inaccurate, misleading or unclear questions.
    - h. If a candidate believes a question is unclear or inaccurate, he/she may challenge the question.
    - i. If the candidate challenges the question, the proctor will review the question.
    - j. If the proctor believes that the question is imprecise, inaccurate or misleading, the proctor may orally examine the candidate on the issue tested by the question. If the candidate exhibits adequate knowledge of the issue, the proctor may give the candidate credit for that question.
    - k. The candidate may challenge no more than three questions per test.
- d. Mentorship:
  - 1) The RTO will continue to mentor newly accredited VSO/VST/CVSO for an undetermined period of time to ensure the individuals understanding of state and federal

laws pertaining to veteran claims as well as providing the highest level of customer service to the veterans and their dependents.

- 2) All newly accredited VSO/VST/CVSO will undergo mentorship and quality checks of claims submitted for an undetermined period before capable of direct submission to the VA. When found proficient, the RTO along with the Regional Manager will make the final approval for *direct* claims submission.
- 3) The Regional Managers and Veterans Service Centers will be responsible to notify the RTO of any specific deficiency in training by their staff or counties under their jurisdiction so the RTO can address the training needs accordingly.
- 4) The RTO will be responsible to disseminate information to the VSO/VST/CVSO of any changes in NCDVA or VA policy and procedures to better serve the veterans across the state.

e. **Regional Schools:**

The RTO will coordinate with the Regional Manager and Training Coordinator to establish an annual regional school to be attended by all VSO/VST/CVSO for the purpose of conveying information and procedures.

f. **Continuing Education Units (CEU):**

The RTO will continually monitor the CEU's for all accredited individuals within their respective region. This is to ensure the required CEU's are maintained for continued accreditation as per NCDVA Policy. These CEU's will be reported to the Regional Manager and Training Coordinator per their request. The RTO will inform the Regional Manager and Training Coordinator of any CEU deficiencies. Any discrepancies will be addressed for corrective action per NCDVA policy.

**12. Outreach:**

The RTO will assist in providing outreach services within their region in order to educate and train all veterans, veteran's advocates or other agencies on applicable services and benefits available to them. This outreach can be accomplished by attending meetings, information seminars or other community events in collaboration with the VSC/CVSO.

**13. Requesting Vacation and/or Sick Leave:**

When an employee wishes to request time off from work, he/she should complete the vacation/sick leave request form in hard copy and turn it in to the Training Coordinator for approval. There are established procedures for entering time data into the BEACON system. This system is operated by the State of NC and provides the employee a computerized system of entering work time, vacation leave and sick leave, etc. All office employees are required to input their 'time' into the BEACON system as appropriate. Additional information regarding time/leave can be obtained at the State Employee website.

Cross coordination with other RTO's will ensure adequate coverage in order to maintain a high level of training availability and effectiveness.

**14. Public Disclosure:**

- a. No employee shall discuss or disclose any information regarding a claimant's pending claim with the public, to include the news media, even with a proper release of information signed by the claimant authorizing this agency to disclose such information. In addition the RTO will not discuss or disclose any information regarding a trainee's progress or test results with anyone other than authorized personnel.
- b. Each employee shall notify the Assistant Secretary of Veterans Affairs/Director or Assistant Director of NCDVA if contacted by the news media for an interview. The employee shall provide complete details of the news media's request. The Department of Administration has

a policy of being notified anytime the news media contacts an employee requesting information.

- c. Each employee shall notify the Assistant Secretary of Veterans Affairs/Director or Assistant Director of NCDVA if contacted by a General Assembly or Legislative member or members of their staff. The employee shall provide complete details of the contact by completing form NCDVA-30 and returning it to the ASO immediately. Refer to Department of Administration Policy GA-030.

**15. Additional Policy Overview:**

The RTO will also adhere to the NCDVA policy manual as well as the SOP for VSC's when performing all duties indicated by this Standard Operating Procedure.

**16. Effective Date:**

This Regional Training Officer Standard Operating Procedure is effectively immediately and will remain in force until authorized changes or cancellations are made hereto.

Approved by: \_\_\_\_\_

Date: \_\_\_\_\_