



Lesson 6: End Product (EP) Codes

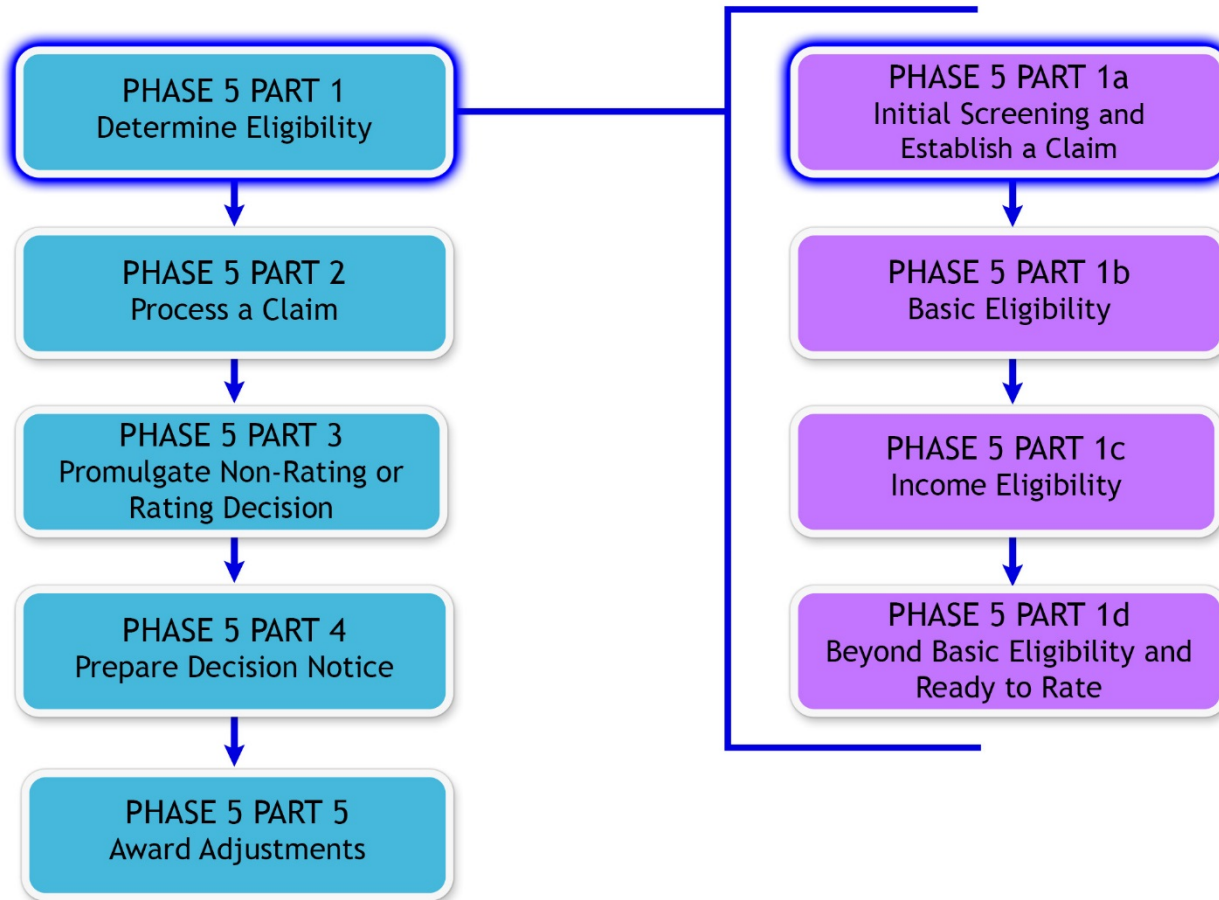
PMC VSR Advanced Core Course

Phase 5: Stages of a Claim

Part 1: Determine Eligibility



You Are Here





Initial Screening

- Complete or Incomplete Applications for Benefits
- Fully Developed Claims
- Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims
- Date of Claim
- Validate POA
- **End Product Codes**
- Introduction to Old Law and Section 306 Pension



Ice Breaker Activity (1 of 2)

- Instructions:
 - Access **End Product (EP) Codes** job aid from the VSR Assistant.
 - Read the scenario on the next slide.
 - Use the job aid to confirm the EP code and Date Of Claim (DOC) are correct based on the scenario.
 - Write down your answer.
- Time allowed: 5–7 minutes



Ice Breaker Activity (2 of 2)

SCENARIO:

Megan Andrews submits a completed VA Form 21-534 (Application for DIC, Survivors Pension, and/or Accrued Benefits) indicating she wants survivors pension on January 7, 2016. A review of the corporate record indicates no previous claims have been submitted. The Claims Assistant selected an EP of 190 and a DOC of 1/07/2016 for this claim.



Technical Competencies

- Program Benefits and Eligibility (PMC VSR)
- Processing Claims (PMC VSR)
- VBA Applications (PMC VSR)



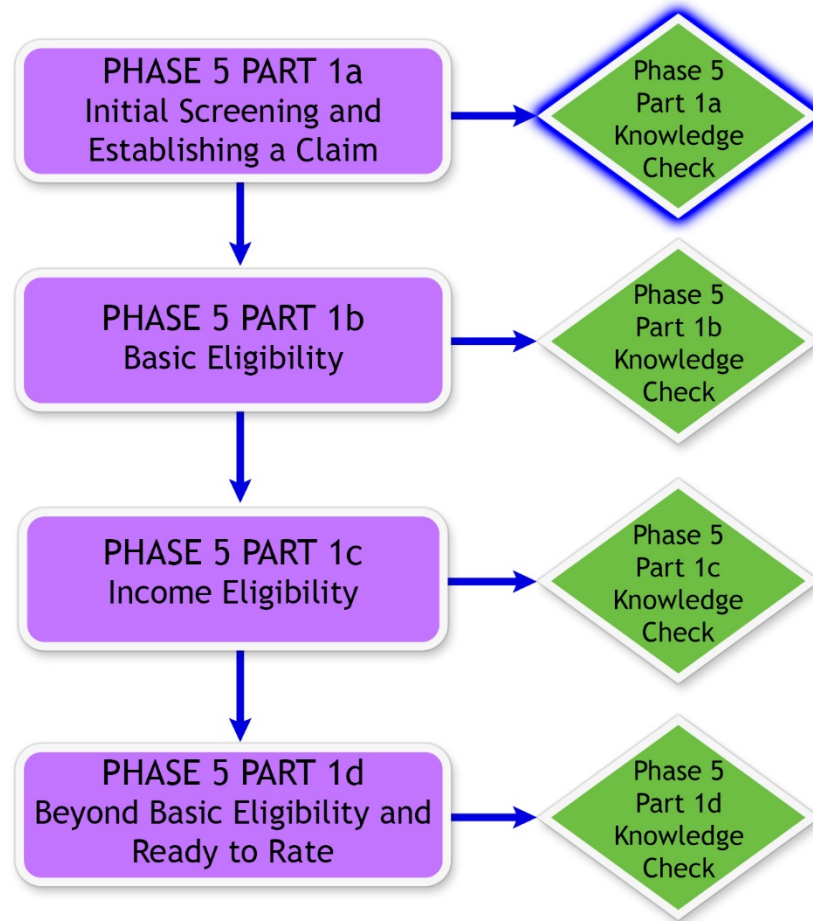
Lesson Objectives

Confirm End Product (EP) code is correct.

- 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).



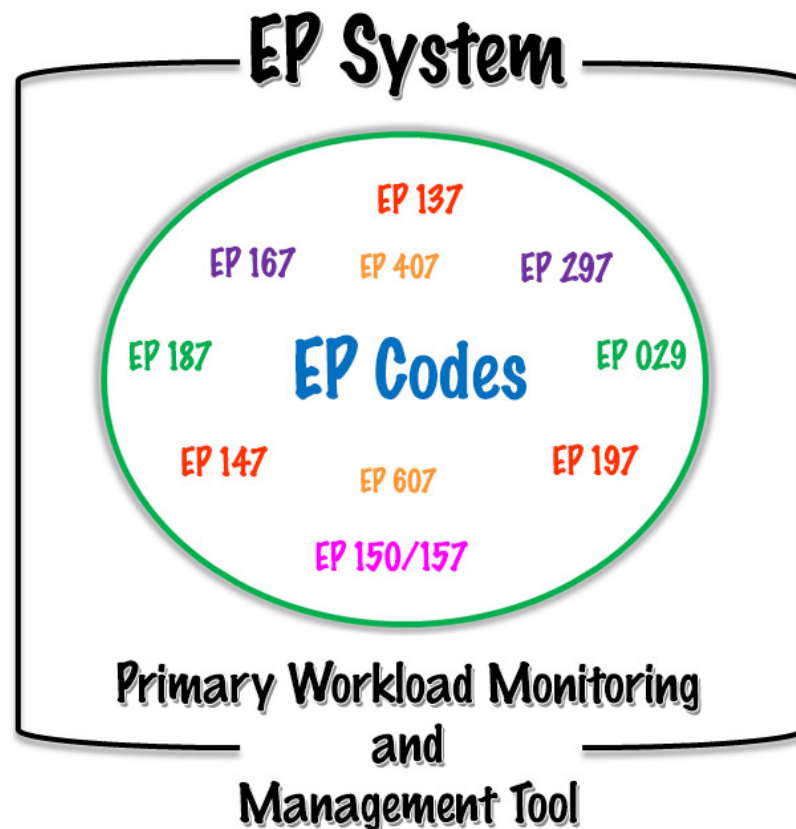
Knowledge Check





What Is an EP Code?

- EP codes are three-digit numbers.
- Each claim is established with an EP code.
- EP codes are part of the EP system that is the primary workload monitoring and management tool.





Third-Digit Modifiers (1 of 2)

- “Modifier” and “Incremental” are used interchangeably
- EP codes may be modified to identify:
 - Issues
 - Type of claim
 - Incremental multiple claims of the same EP category



Third-Digit Modifiers (2 of 2)

140 + Modifier 7 = 147





List of Authorized EP Codes

Pension Claim Types:

- Original
- Maintenance
- New
- Reconsidered



EP Codes and Claim Types (1 of 3)

- When should the original EP code be used?
- When are maintenance EP codes most commonly used?



EP Codes and Claim Types (2 of 3)

- Reopened claims are now referred to as ***new*** claims for pension purposes.
- Reopened claims are still used for DIC and compensation claims.



EP Codes and Claim Types (3 of 3)

- A reconsidered EP code would be any EP code **OTHER** than an original EP.
- Example EP codes for reconsidered claims:
 - 137 (reconsideration of dependency)
 - 150 (reconsideration of income/net worth)
 - 029 (reconsideration of DIC)
 - 127 (reconsideration of competency or SMP)
 - 160 (reconsideration of burial)
 - 290 (reconsideration of eligibility)



Group Activity—Practice Exercise

- Instructions:
 - Each group has the following roles:
 - Announcer—Gives the group the EP code from the left column of the EP Code Worksheet in Trainee Guide
 - Navigator—Looks up the EP code in the **End Product (EP) Codes** job aid
 - Transcriber—Notes the answer in right column of the EP Code Worksheet in Trainee Guide
 - Using the **End Product (EP) Codes** job aid as a reference, select the claim type (original, new, reopened, or maintenance) for the given the EP code.
- Time allowed: 10–12 minutes



Group Activity—Practice Exercise Answers (1 of 4)

EP Code	Pension/DIC Claim Types Original, Reopened, New or Maintenance
EP 137	<i>New or Maintenance</i>
EP 029	<i>Reopened</i>
EP 187	<i>Original</i>
EP 147	<i>Original</i>
EP 127	<i>New</i>
EP 197	<i>Original</i>
EP 150/157	<i>New or Maintenance</i>



Group Activity—Practice Exercise Answers (2 of 4)

Original claims:

- **EP 187**—This EP is used for a Veteran who is applying for pension benefits and has **never** applied for VBA benefits before.
- **EP 197**—This EP is used for surviving spouses or children of Veterans applying for pension who have **never** applied before.
- **EP 147**—This EP is used for surviving spouses or children of Veterans applying for DIC benefit (Dependency and Indemnity Compensation) service connected survivors' benefit who have **never** applied before.



Group Activity—Practice Exercise Answers (3 of 4)

New/Reopened Claims:

- **EP 029**—This EP applies to *reopened* DIC claims and requests for aid and attendance while receiving DIC.
- **EP 127**—This EP applies to *new* disability pension and survivors' pension claims.



Group Activity—Practice Exercise Answers (4 of 4)

Maintenance claims:

- **EP 137**—This EP applies to all actions involving dependency determinations where the primary issue involved is entitlement based on relationship or dependency.
- **EP 150/157**—This EP applies to survivors and disability claims where the issue involved is entitlement of benefits based on income or estate factors. This EP also applies to adjustments based on medical expenses submitted.



EP Codes in VBA Applications

EP Code can be verified
in the following VBA
Applications:

- SHARE
- MAP-D
- VBMS





Modifying the EP Code

Modifying an EP code involves using the PIF change (PCHG) function in SHARE.



Group Activity—Practice

- Instructions:
 - Divide into groups of two or three.
 - Each group will receive one sample EP code to change in SHARE.
 - Use the **Modifying End Product (EP) Codes** job aid in the VSR Assistant to practice the process of modifying the EP code.
- Time allowed: 10–15 minutes



Group Activity—Practice Exercise

- Instructions:
 - Divide into groups of two or three.
 - Use the **End Product (EP) Codes** job aid in the VSR Assistant to confirm the EP code is correct based on the scenario.
 - Provide the rationale for your decision.
 - Write answers in the space provided.
 - Submit one answer sheet per group to the instructor.
- Time allowed: 8–10 min.



Group Activity—Practice Exercise Answers (1 of 3)

Scenario 1: On February 8, 2016, Frank Rogers submits a VA Form 21-4138, Statement in Support of Claim, and a Social Security benefit statement indicating he began receiving Social Security benefits in the amount of \$1,250.00 per month. The Claims Assistant entered an EP 150 into the system.

- **Yes, the EP 150 is correct.**
- **Rationale:** *Based on the scenario, the EP code would be 150 because it is adjustment due to changing income.*



Group Activity—Practice Exercise Answers

(2 of 3)

Scenario 2: Angela Roberts, the surviving spouse of Anthony Roberts—a deceased Veteran previously in receipt of VA Compensation benefits—submits a VA Form 21-601 Application for Accrued Amounts Due a Deceased Beneficiary on March 3, 2016. The Claims Assistant entered EP 147 into the system.

- **No**, the correct EP is 165.
- **Rationale:** Based on the scenario, the EP code would be 165 because the application is for accrued benefits payable based on relationship.



Group Activity—Practice Exercise Answers

(3 of 3)

Scenario 3: Joan Smith submits a completed VA Form 21-674, Request for Approval of School Attendance, on January 15, 2016, to continue her school age child, Jeffrey, as a dependent on her award. The Claims Assistant entered EP 157 into the system.

- **No**, the correct EP is 137.
- **Rationale:** Based on the scenario, the EP code would be 137 because the claim applies to actions involving dependency determinations.



Lesson Summary

- What is an EP code?
- What is the third-digit modifier used for?
- Where should you go to find the authorized list of EP codes?
- Why do you need to verify the EP code is correct?
- What happens if the EP code is incorrect in a VBA application?
- Where do you go to fix an incorrect EP code?



Questions?





What's Next

Phase 5, Part 1, Lesson 7: Introduction to Old Law and Section 306 Pension