800 Series Work Items

Trainee Handout

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Objectives

Provided with the appropriate manual and regulatory references and handouts, the employee will be able to:

* Describe what an 800 Series Work Item (WI) is
* Locate 800 Series Work Items (WIs) in VBMS and SHARE
* Explain the disposition of a WI after review
* Identify when to use the “Potential Under/Overpayment” Special Issue

References

All M21-1 references are found in the [Compensation](https://vaww.compensation.pension.km.va.gov/) and Pension Knowledge Management (CPKM) Portal.

* [M21-1 III.ii.1.B.2.d, Placing Claims and 800 Series Work Items Under EP Control](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000014111/M21-1-Part-III-Subpart-ii-Chapter-1-Section-B-Mail-Management#2d)
* [M21-1 III.v.10.A, 800 Series Work Items and Cost-of-Living Adjustment (COLA)](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000032244/M21-1%2C%20Part%20III%2C%20Subpart%20v%2C%20Chapter%2010%2C%20Section%20A%20-%20800%20Series%20Work%20Items%20and%20Cost-of-Living%20Adjustment%20%28COLA%29)
* [M21-4 Appendix C, Index of Claim Attributes](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000036570/Appendix%20C.%20Index%20of%20Claim%20Attributes)

800 Series Work Items

An ***800 series work item*** is a system-generated message designed to assist Veterans Service Centers (VSCs) and pension management centers (PMCs) in identifying and tracking cases that require follow-up action. Each 800 series work item has a descriptive claim label indicating the nature of the review required.

An 800 series work item may be generated as a result of maturation of a diary or other system triggers such as benefit details, returned payments, or data related to dependents.

800 Series WIs are for tracking purposes only*.* **Do not complete any development, rating, or award actions under an 800 series.**

***Exception***:  When necessary, certain actions can be taken in connection with review of an 800 series work item without a separate end product (EP) as provided in [M21-1, Part III, Subpart v, 10.A.2.c](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000032244/M21-1%2C%20Part%20III%2C%20Subpart%20v%2C%20Chapter%2010%2C%20Section%20A%20-%20800%20Series%20Work%20Items%20and%20Cost-of-Living%20Adjustment%20%28COLA%29) (discussed below).

**Note**: Unlike End Products (EPs), 800 series WIs only appear in the Corporate Database (accessed through VBMS and Share) and are not viewable in PIF Inquiry.

**Viewing 800 Series Work Items in VBMS and Share**

Individual Work Items can be viewed via VBMS and Share.

To view individual Work Items in VBMS, open the profile for the claim number in question, select the CLAIMS option from the top banner, and select the 800 series WI.

Note: Details are displayed by clicking on the EXPAND CLAIM DETAILS banner. Notes are displayed by selecting the NOTES option from the top banner.

To view individual Work Items in SHARE, use the Corporate Inquiries function in SHARE and select the “Claims/Denials” tab. If multiple EPs/WIs exist, a grid will display containing all active and historical EPs/WIs. To display data specific to the Work Item in question, click on the 800 Series Work Item from the grid view.

**Types of 800 Series Work Items**

Work Items are assigned based on status categories. These categories include:

* **810WI:** Notice of Benefit Payment Transaction
* **820WI:** Explanation of Audit Message
* **830WI:** Miscellaneous
* **840WI:** Combat-Related Special Compensation (CRSC) / Concurrent
Retirement and Disability Payments (CRDP) Audit Error Worksheets (AEW)
* **850WI:** Manual Payment Adjustments (e.g., annual COLA)

Refer to [M21-4 Appendix C.1.b, Index of Claim Labels](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000036570/Appendix%20C.%20Index%20of%20Claim%20Attributes#1b) for appropriate claim labels for WIs.

**Disposition of an 800 Series Work Item After Review**

Once an 800 series work item has been reviewed, dispose of the work item as follows:

* **Work items where no other action is necessary** – Cancel using the following reason:
	+ *Message Received, No Action Necessary*
* **Work items where additional processing is required** – Clear using the following reason (and establish the proper controlling End Product):
	+ *Message Received, Worked Under Proper EP*

Please keep in mind that 800 Series WIs are system generated. One-time clears of the 800 Series, as well as manually establishing items in the 800 Series, is **neither appropriate nor authorized**. In other words, only change, clear, and/or cancel 800 Series WIs. Never establish and/or one-time clear 800 Series WIs manually.

**Exceptions to Establishing a Controlling EP**

In some cases, the required action does not require creation of an EP.

Examples include:

* + processing a first notice of death using the FNOD command in Share
	+ reviewing a claims folder to confirm the accuracy of the results of a records-matching program, and
	+ sending a questionnaire or letter due to failure of automatic issuance by the Hines Information Technology Center, such as described in [M21-1, Part III, Subpart iii, 5.K.1.d](https://vaww.vrm.km.va.gov/system/templates/selfservice/va_kanew/help/agent/locale/en-US/portal/554400000001034/content/554400000015797/M21-1%2C-Part-III%2C-Subpart-iii%2C-Chapter-5%2C-Section-K---Verification-of-Marital-Status-and-the-Status-of-Dependents).

**Date of Claim (DOC) for Controlling EPs**

Use the date of the 800 Series WI as the DOC for the controlling EP.

***Note***:  If no date is shown, use the date the RO initiated review of the work item.

**When to Add *Potential Under/Overpayment* Special Issue**

If an award adjustment associated with an 800 series work item could result in an overpayment or underpayment of benefits attach the Potential Under/Overpayment special issue to a contention of the controlling EP.

The special issue must remain in place until all actions involving an underpayment or overpayment are completed, to include simultaneous or subsequently received information involving an additional underpayment or overpayment action. This includes adding the special issue to any EP 600 associated with proposed adverse action arising from the 800 series work item.

Review Exercise

Please review and complete the following short answer statements.

1. To dispose of an 800 series WI that doesn’t require further action, you must \_\_\_\_\_\_\_\_\_\_\_\_\_ it using the following reason: ­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
2. To dispose of an 800 series WI when additional action is needed, you must \_\_\_\_\_\_\_\_\_\_\_\_\_ it using the following reason: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
3. What is the date of claim for a controlling EP based on a work item?
4. Information on 800 series WI can be viewed in \_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_.
5. If an award adjustment associated with an 800 series work item could result in an overpayment or underpayment of benefits, attach the “\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_” Special Issue to a contention of the controlling EP.
6. 800 Series Work Items are for tracking purposes only; therefore no \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ actions should be performed under an 800 Series Work Item (with rare exceptions).