800 Series Work Items

Instructor Lesson Plan

Time Required: 1.5 Hours

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 3872199 |
| Prerequisites | Prior to this lesson, Veterans Service Representatives (VSRs) should have a general knowledge of End Products (EPs). |
| target audience | The target audience for this lesson is a VSR.  Although this lesson is targeted to teach VSRs, it may be taught to other VA personnel as mandatory or refresher type training. |
| Time Required | 1.5 hours |
| Materials/ TRAINING AIDS | Lesson materials:   * 800 Series Work Items PowerPoint Presentation * 800 Series Work Items Trainee Handout   **This lesson will be much more effective if you have live cases with which to demonstrate how to find WIs in the Corporate Record and what was done with a couple of them!** |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the evaluation |

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| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| 800 Series Work Items | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | 1 hour |
| Purpose of Lesson and Motivation  Explain the following:  *Slide 2* | | This lesson is intended to provide the trainee with an introduction to 800 Series Work Items (WI) and how to process them. This lesson will contain discussions and exercises that will allow the learner to gain a better understanding of:   * What 800 Series Work Items are used for * How to identify 800 Series WIs * How to accurately process 800 Series WIs * Proper usage of “Potential Under/Overpayment” special issue   Understanding Work Items is vital for processing follow-up actions related to VA Benefits correctly and efficiently, which leads to the correct status of benefits. When the appropriate tracking EP is applied, it enables stations to significantly reduce and/or prevent overpayments and underpayments. The correct DOC, and use of the “Potential Under/Overpayment” Special Issue (if appropriate), ensures timely processing. |
| Lesson Objectives  Discuss the following:  Slide 3  Handout 2 | In order to accomplish the purpose of this lesson, the trainee will be required to accomplish the following lesson objectives.  Thetrainee 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  Slide 4  Handout 2 | * [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) * [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,%20Part%20III,%20Subpart%20v,%20Chapter%2010,%20Section%20A%20-%20800%20Series%20Work%20Items%20and%20Cost-of-Living%20Adjustment%20(COLA)) * [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) | |

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| 800 Series Work Items  Slide 5-6  Handout 3 | Explain what a WI is and give some examples. You may want to show the trainees the different claim labels in M21-4 Appendix C.1.b (and the historical ones in 1.c) to give them an idea of how many different WIs there are. We don’t recommend going into depth, except to give some examples, as details about how to process all of them are beyond this introductory lesson.  Emphasize that 800 Series WIs are for tracking purposes only and that no development, rating, or award actions should be taken using them.  Explain that unlike EPs, 800 WIs only appear in the Corporate Database. This means that Work Items are not available via a PIF Inquiry. |
| **Viewing 800 Series Work Items in VBMS and Share** Slide 7-8  Handout 3 | If available, demonstrate viewing WIs (and controlling EPs) in VBMS and Share. |
| Types of 800 Series Work Items  Slide 9  Handout 3-4 | Depending on the audience, you may want to go into detail about the different kinds of WIs. If so, refer to M21-1 III.v.10.A.1.d-h and show them all the different claim labels. |
| **Disposition of an 800 Series Work Items After Review and Exceptions**  Slide 10-11  Handout 4 | As of September 15, 2020 there are new reasons to use when disposing of a WI. If possible, demonstrate clearing and/or cancelling a WI and establishing the appropriate controlling EP (if needed) and talk about the exceptions. |
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| **Date of Claim for Controlling Eps**  Slide 12  Handout | Make sure they know this! Show examples if you have them, especially for a WI without a date given. |
| **When to Add Potential Under/Overpayment Special Issue**  Slide 13  *Handout 6* | Emphasize the importance of this in paying the correct benefits as quickly as possible. Emphasize that this special issue must remain on/be included with all subsequent controlling EPs that are a result of the WI.  You may want to explain the following if you have a more experienced group:  Historically, EPs 690 and 693 were used to provide oversight and control over claims with the potential to create over/underpayments. Either EP 690 or 693 were established based on how the notification of potential over/underpayment was received. However, to simplify this process, use of the “Potential Under/Overpayment” special issue was instituted. |

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| Review Exercise | |
| Time Required | 0.25 hours |
| EXERCISE  *Handout 10* | Ask if there are any questions about the information presented in the exercise, and then proceed to the Review.  Allow trainees to work individually or in groups to discuss and complete the practical exercise included in the Trainee Handout. |

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| Lesson Review, Assessment, and Wrap-up | |
| Introduction  Discuss the following: | The 800 Series Work Items lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. |
| Time Required | 0.25 hours |
| Lesson Objectives | You have completed the 800 Series Work Items lesson.  The trainee should 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 |
| Assessment | Remind the trainees to complete the on-line evaluation in TMS to receive credit for completion of the course. |