



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 6: Processing Claims

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

August 21, 2017

Version 1.0

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

Process 820 Series Work Items (Notice of Death)

Lesson Overview

Topic	Description
Time Estimate:	3 hours
Purpose of the Lesson:	This lesson is part of the entry-level course for PMC VSRs. The purpose of this lesson is to train PMC VSRs on how to process 820 series work items (notice of death) through demonstration and practice. This lesson also includes instruction on how to use the systems for processing 820 series work items (notice of death).
Prerequisite Training Requirements:	Prior to taking the Process 820 Series Work Items (Notice of Death) lesson, trainees must complete entry-level: <ul style="list-style-type: none">• Phases 1–5• Phase 6, Lessons 1-15. (Refer to the Master Course Map learning aid for a list of lessons.)
Target Audience:	This lesson is for entry-level PMC VSRs.
Lesson References:	<ul style="list-style-type: none">• Master Course Map learning aid• VA Form 10-7132 (Status Change Form)• VA Form 21-534 (Application for Dependency and Indemnity Compensation, Survivors Pension and Accrued Benefits by a Surviving Spouse or Child [including Death Compensation if Applicable])• VA Form 21-534EZ (Application for DIC, Survivors Pension, and/or Accrued Benefits)• VA Form 21-0537 (Marital Status Questionnaire)• VA Form 21P-601 (Application for Accrued Amounts Due a Deceased Beneficiary)• M21-1 I.2.D.1.g (Contemporaneous Notice and Report of Death)• M21-1 III.ii.1.B.2.c (Placing Claims and 800 Series Work Items Under EP Control)

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Topic	Description
	<ul style="list-style-type: none"> • M21-1 III.ii.2.B.1.c (Benefit Requests Not Requiring a Prescribed Form) • M21-1 III.ii.8 (First Notice of Death [FNOD] Processing) <ul style="list-style-type: none"> ○ M21-1 III.ii.8.A.1.d (Notice Requirements Associated With Veteran FNOD Processing) ○ M21-1 III.ii.8.A.1.h (Guidelines for Specific Veteran NOD Situations) • M21-1 III.v.10.A.1 (800 Series Work Items) <ul style="list-style-type: none"> ○ M21-1 III.v.10.A.1.a (Definition: 800 Series Work Items) ○ M21-1 III.v.10.A.1.g (820WI Claim Labels) • M21-1 III.v.10.A.2 (Processing 800 Series Work Items) • M21-1 V.iii.1.E.3.a (Combined Rate Payable to Veterans Married to Each Other) • M21-1 V.iii.4.2 (Making Payments in Veteran-Married-to-Veteran Improved Pension Cases) • M21-1 X.5 (Social Security Death Master File) <ul style="list-style-type: none"> ○ M21-1 X.5.1.b (Message Code 833 Work Items) ○ M21-1 X.5.1.c (Automated Actions Based on Death Match) ○ M21-1 X.5.2.a (Reviewing the Master Record on DMF Matches) ○ M21-1 X.5.4.c (Uploading Match Listing in the eFolder) • M21-4 Appendix C, Section I.b (Index of Claim Labels) • 38 CFR 3.700(a)(4) (Veterans—Improved pension.) • Processing an Award Adjustment job aid • See <i>Lesson 16: Appendix A</i> for references introduced in earlier lessons
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • VBA Applications (PMC VSR)

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Topic	Description
Knowledge Check:	Phase 6, Lesson 16 Knowledge Check: Process 820 Series Work Items (Notice of Death)
Lesson Objectives:	<ul style="list-style-type: none"> • Process 820 series work items. <ul style="list-style-type: none"> ○ Determine which 820 series work item was received. ○ Determine the appropriate steps to process the 820 series work item. ○ Perform the required actions to process the 820 series work item. ○ Create notification letter, if applicable. ○ Submit the outcomes of the 820 series work item to the Authorizer.
What You Need:	<ul style="list-style-type: none"> • Lesson Plan • Master Course Map learning aid • Additional instructors to achieve a 1:4 instructor/trainee ratio during the Guided Practice Exercise portion of the lesson • Slides • Projector • Whiteboard/flip chart with different colored markers • Access to the Processing an Award Adjustment job aid from VSR Assistant • See <i>Lesson 16: Appendix A</i> for other job aids • Applicable VBA applications used in job aids and references listed in <i>Lesson 16: Appendix A</i> • Example 820 Work Item 1 for Demonstration—820 series work item with: <ul style="list-style-type: none"> ○ PMC VSR receives an 820-833C: SSA Death C&P Matched work item from the Coach. ○ The PMC VSR reviews the corporate record and determines the Veteran has a running pension award and no action has been completed to terminate based on the death of the Veteran.

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Topic	Description
	<ul style="list-style-type: none">○ The PMC VSR pulls an SSA SHARE print to review for the Veteran's date of death.○ SHARE print verifies that the Veteran passed away April 15, 2017.○ The PMC VSR updates the Veteran's BIRLS record through an FNOD (First Notice of Death) reflecting the verified date of death.○ This action clears the 820 work item.● Populate slide 11 with demographic information about Example 820 Work Item 1.● Example 820 Work Item 2 for Demonstration—820 series work item with:<ul style="list-style-type: none">○ PMC VSR receives an 820-833A: SSA Death DOB Mismatch work item from the Coach for a surviving spouse.○ The PMC VSR reviews the corporate record and determines the surviving spouse has a running Survivor's pension award and no action has been completed to terminate based on the death of the beneficiary.○ When attempting to pull an SSA SHARE print to confirm the death of the surviving spouse, the PMC VSR receives an error that the date of birth does not match the date of birth on record with SSA.○ After further review of the surviving spouse's file, the PMC VSR determines the date of birth of record is incorrect.○ The PMC VSR updates the corporate record to reflect the correct date of birth for the surviving spouse found on the original VA Form 21-534, Application for DIC, Death Pension, and Accrued Benefits.○ The PMC VSR is then able to pull an SSA SHARE print to review for the surviving spouse's date of death.

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Topic	Description
	<ul style="list-style-type: none">○ The SHARE print verifies that the surviving spouse passed away February 8, 2017.○ The PMC VSR CESTs an EP 137 Report of Death of Beneficiary and inputs the appropriate date of death into VBMS to terminate the surviving spouse's award.○ The PMC VSR then creates an estate letter in VBMS to inform the estate of the terminated award based on the death of the surviving spouse.● Populate slide 17 with demographic information about Example 820 Work Item 2.● Example 820 Work Item 3 for Demonstration—820 series work item with:<ul style="list-style-type: none">○ PMC VSR receives an 820-738 FNOD Vet Married to Vet-Spouse Award Needs Adjustment work item from the Coach for a Veteran.○ The PMC VSR reviews the corporate record and determines that the living Veteran has a running Veteran's pension award with aid and attendance.○ Upon further review she discovers that the Veterans dependent spouse is also a Veteran and previously had a running Veteran's pension award until he passed away February 8, 2017.○ Both Veterans were paid separately at the Veteran-married-to-Veteran aid and attendance rate and their only sources of income were their respective monthly Social Security benefits.○ The PMC VSR reviews the deceased Veteran's file and discovers his death certificate showing his date of death as February 8, 2017.○ The PMC VSR pulls an SSA SHARE print for both Veteran's.○ There is no change to either Social Security income when compared to the amounts counted on their award.

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Topic	Description
	<ul style="list-style-type: none">○ The SHARE print also verifies the deceased Veteran's date of death.○ The PMC VSR CESTs an EP 137 PMC-Removal of Dependent and inputs the appropriate dependency adjustment in VBMS on the living Veteran's award, thus removing the deceased Veteran as a dependent effective March 1, 2017.○ The PMC VSR then creates a PCGL letter informing the living Veteran of the dependency adjustment and her updated Veteran's pension rates.● Populate slide 24 with demographic information about Example 820 Work Item 3.● Work Item Example 4 for Guided Practice Exercise—820 series work item with:<ul style="list-style-type: none">○ A PMC VSR receives an 820-833C: SSA Death C&P Matched work item from the Coach for a surviving spouse.○ The PMC VSR reviews the corporate record and determines the surviving spouse has a running Survivor's pension award and no action has been completed to terminate based on the death of the beneficiary.○ The PMC VSR pulls an SSA SHARE print to review for the surviving spouse's date of death.○ The SHARE print verifies that the surviving spouse passed away December 15, 2016.○ The PMC VSR CESTs an EP 137 Report of Death of Beneficiary and inputs the appropriate date of death into VBMS to terminate the surviving spouse's award.○ The PMC VSR then creates an estate letter in VBMS to inform the estate of the terminated award based on the death of the surviving spouse.● Populate slide 33 with demographic information about Example 820 Work Item 4.

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Instructor Notes

This lesson provides trainees with instruction, practice, and the needed references to process 820 series work items. Trainees will also be required to demonstrate how to use the systems for processing 820 series work items.

PowerPoint Slides	Instructor Activities
<p>Lesson 16: Process 820 Series Work Items (Notice of Death)</p>	<p>DISPLAY slide</p> <p>1. "Lesson 16: Process 820 Series Work Items (Notice of Death)"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<p>You Are Here</p> <div style="text-align: center;"> <pre> graph TD P1[PHASE 1 Mandatory Training] --> P2[PHASE 2 PMC VSR Foundation] P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> P5[PHASE 5 Stages of Claim] P5 --> P6[PHASE 6 Processing Claims] </pre> </div>	<p>DISPLAY slide</p> <p>2. "You Are Here"</p> <div style="text-align: center;"> </div> <p>REFER to the Master Course Map learning aid in the Trainee Guide.</p> <p>DESCRIBE the diagram.</p> <p>REMINDE trainees that all of the lessons in Phase 6 will provide demonstrations and practice of the skills learned in Phases 4 and 5.</p> <p>REMINDE trainees that they:</p> <ul style="list-style-type: none"> • Must use the M21-1 and the job aids in the VSR Assistant to be successful in these lessons. • Should keep M21-1 in CPKM and the VSR Assistant open and ready to use throughout this and subsequent lessons. <div style="text-align: center;"> </div> <p>NOTE TO INSTRUCTOR:</p> <ul style="list-style-type: none"> • It is critical that you teach the trainees using the procedures presented in the previous lessons and job aids as well as those introduced in this lesson.


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PowerPoint Slides	Instructor Activities
	<ul style="list-style-type: none"> This training is designed to build skills gradually, as well as establish consistent procedures across PMCs. Do not confuse the trainees by processing an 820 series work item the way you “have always done it.” The trainees need consistency in order to master the skills to perform the job.
<p>Definition Reminder: 800 Series Work Items</p> <ul style="list-style-type: none"> An 800 Series Work Item is a system-generated message issued through the Veterans Service Network (VETSNET) that is designed to assist Veterans Service Centers (VSCs) and Pension Management Centers (PMCs) in identifying and tracking cases that require follow-up action. 800 series work items replace paper work items. M21-1 III.v.10.A.1.a (Definition: 800 Series Work Items) 	<p>DISPLAY slide</p> <p>3. “Definition Reminder: 800 Series Work Items”</p>  <p>REMINd trainees of the possible indicators presented in the Claim Types Job Aid for 800 Series Work Items:</p> <ul style="list-style-type: none"> A record received by VA matching programs that indicates a contradiction or mandated review, which requires action by a VSR Internal system generated by HINES Information Technology Center (ITC) VA Form 21-0537, Marital Status Questionnaire VA Form 10-7132, Status Change Form <p>REFER trainees to M21-1 III.v.10.A.1.a (Definition: 800 Series Work Items).</p> <p>SELECT one trainee to read the definition of 800 series work items.</p> <p>SELECT another trainee to read the Important bullet points in the reference.</p> <p>EXPLAIN that, in the past, PMC VSRs may have referred to 800 series work items as “write-out messages,” but that they should be called work items.</p>


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PowerPoint Slides	Instructor Activities
<p>Scenario—820 Series Work Item</p> <p>PMC VSR April Boston receives notice from her Coach that an 820 work item is pending for Veteran Adam Johnson. PMC VSR will then go through the steps to verify the Veteran’s death and terminate his running award.</p>	<p>DISPLAY slide</p> <p>4. “Scenario—820 Series Work Item”</p> <p>SELECT one trainee to read the scenario on the slide.</p> <p>EXPLAIN that this is an example of the type of 820 series work item that a PMC VSR might encounter.</p>
<p>Characteristics of 820 Series Work Item Processing</p> <ul style="list-style-type: none"> • 820 series work items: <ul style="list-style-type: none"> ○ Are system-generated notifications from the Matching Program with the Social Security Administration (SSA). ○ Are not generated by a claim submitted to VA. ○ Indicate to a PMC VSR that a deceased beneficiary’s benefits should be terminated. • FNOD action for a Veteran or CESTed: EP 137 for a non-Veteran 	<p>DISPLAY slide</p> <p>5. “Characteristics of 820 Series Work Item Processing”</p> <p>EXPLAIN that 820 series work items:</p> <ul style="list-style-type: none"> • Are system-generated notifications received from the Social Security Administration (SSA). • Are not actions initiated by a claim submitted to VA. • Indicate to a PMC VSR that a deceased beneficiary’s benefits should be terminated. • Alert a PMC VSR to: <ul style="list-style-type: none"> ○ Initiate an FNOD for a Veteran. ○ CEST an EP 137 for a non-Veteran.
<p>820 Series Work Item Claim Labels</p> <ul style="list-style-type: none"> • 738: FNOD Vet Married to Vet: Spouse award needs adjustment • 833A: SSA Death DOB Mismatch: Master record date of birth does not match the SSA date of birth 	<p>DISPLAY slide</p> <p>6. “820 Series Work Item Claim Labels”</p> <div style="text-align: center;">  </div> <p>REFER trainees to M21-4 Appendix C.I.b (Index of Claim Labels) for the first claim label, 738.</p>

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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> • 833B: SSA Death Name Mismatch: Master record last name or first initial of the first name do not match the SSA last name and/or first initial of the first name • 833C: SSA Death C&P Matched: The master record and the SSA DMF match on SSN, DOB, and name 	<p>REFER trainees to M21-1 X.5.1.b (Message Code 833 Work Items) for the remaining claim labels.</p>
<p>Why It Matters!</p>  <ul style="list-style-type: none"> • Helps prevent VBA from making overpayments to deceased beneficiaries that VBA cannot recover • Provides cost-saving input into Omnibus Budget Reconciliation Act of 1990 (OBRA) reporting for the PMC 	<p>DISPLAY slide 7. "Why It Matters!"</p> <p>EXPLAIN that processing 820 series work items "matters" because these work items:</p> <ul style="list-style-type: none"> • Help prevent VBA from making overpayments to deceased beneficiaries that VBA cannot recover. • Provide cost-saving input into Omnibus Budget Reconciliation Act of 1990 (OBRA) reporting for the PMC. <p>EXPLAIN that this lesson will focus on demonstrating how to process 820 series work items by integrating the rules and procedures trainees learned in Phase 5 and Phase 6, Lesson 15: <i>Process 810 Series Work Items</i>.</p>
<p>Lesson Objectives</p> <ul style="list-style-type: none"> • Process an 820 series work item. <ul style="list-style-type: none"> ○ Determine which 820 series work item was received. ○ Determine the appropriate steps to process the 820 series work item. 	<p>DISPLAY slide 8. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>



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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> ○ Perform the required actions to process the 820 series work item. ○ Create notification letter, if applicable. ○ Submit the outcomes of the 820 series work item to the Authorizer. 	
<p>Knowledge Check</p> <pre> graph TD P1[PHASE 1 Mandatory Training] --> C1{Lesson Specific} P1 --> P2[PHASE 2 PMC VSR Foundation] P2 --> C2{TPSS Knowledge Check} P2 --> P3[PHASE 3 PMC VSR Resources] P3 --> C3{Phase 3 Knowledge Check} P3 --> P4[PHASE 4 Introduction to Pension Management] P4 --> C4{Phase 4 Knowledge Check} P4 --> P5[PHASE 5 Stages of Claim] P5 --> C5{Multiple Knowledge Check} P5 --> P6[PHASE 6 Processing Claims] P6 --> C6{Multiple Knowledge Check} </pre>	<p>DISPLAY slide 9. "Knowledge Check"</p> <p>INFORM trainees that they will be assessed on this content in Phase 6 Knowledge Check: Process 820 Series Work Items (Notice of Death). The knowledge check will be given after this lesson.</p>
<p>Lesson Overview</p> <ul style="list-style-type: none"> ● Demonstration: Instructor processes various 820 series work items from start to finish with opportunities for questions. ● Guided Practice Exercise: Trainees process an 820 series work item with questions and feedback/remediation. 	<p>DISPLAY slide 10. "Lesson Overview"</p> <p>REMIND trainees that the purpose of Demonstration strategy is to provide them with the opportunity to see the flow of the complete process from beginning to end, as they would do it in the field. Trainees will have opportunities to ask questions for clarification.</p>




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PowerPoint Slides	Instructor Activities
	<p>REMINDEE trainees that the purpose of the Guided Practice Exercise strategy is to allow them to perform the steps using a job aid.</p> <ul style="list-style-type: none"> • Trainees may ask questions about processing an 820 series work item to increase their understanding. • Instructors provide feedback and remediation as trainees proceed through the process. <p>TELL trainees that the first demonstration will help them understand 820 work items in which all information in the system matches with the SSA inquiry.</p>
<p>Demonstration Example Work Item 1—Process an 820-833C SSA Death C&P Matched</p> <p>Example Work Item 1:</p> <ul style="list-style-type: none"> • {Name} • {Other information} 	<p>DISPLAY slide</p> <p>11. "Demonstration Example Work Item 1—Process an 820-833C SSA Death C&P Matched"</p>  <p>REMINDEE: Populate this slide with demographic information about Example Work Item 1.</p> <p>INTRODUCE Example Work Item 1.</p> <p>SELECT one of the trainees to read the Example Work Item 1 information on the slide.</p> <p>REMINDEE trainees that you will demonstrate how to process an 820-833C work item from start to finish. You will break after each section to take questions, so trainees should write their questions down and ask at the designated opportunities.</p>  <p>REFER trainees to the Processing an Award Adjustment job aid as a resource for steps to take to process an 820-833C work item.</p>






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PowerPoint Slides	Instructor Activities
	 <p>EXPLANATION OF DEMONSTRATION FOR INSTRUCTOR:</p> <ul style="list-style-type: none"> • It is important for you as the instructor to “think out loud” so that the trainees understand your thought processes. • It is vital that you follow the steps and instructions taught in the job aids and previous lessons to ensure continuity and prevent confusion. You must be familiar with the related lessons from Phases 4, 5, and 6 as specified in Lesson 16: Appendix A. • Address every step in a process even if it is not relevant to the particular case—these are novice PMC VSRs learning processes that will be applied to all 820 series work items. • For example, you, the instructor, as an experienced PMC VSR, will recognize certain 820 claim labels easily and already know the likely solution to resolve it. However, it is important to point out to the trainees that first you did determine which claim label was received before you determined the steps to take and then performed the necessary actions to process the work item.
<p>Example Work Item 1— Determine Which 820 Series Work Item Was Received</p>  <ul style="list-style-type: none"> • Receive notice by Coach of 820-833C system-generated notification from SSA regarding death of beneficiary. 	<p>DISPLAY slide 12. “Example Work Item 1— Determine Which 820 Series Work Item Was Received”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p>





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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> Confirm the claim label on the inquiry. 	<p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> Validate Power of Attorney (POA) <p> DEMONSTRATE, using Example Work Item 1, how a PMC VSR would determine which 820-833C work item was received.</p> <p> EXPLAIN that a PMC VSR may receive multiple related work items at one time; for example, a returned check could generate multiple work items if it is returned due to the death of the recipient.</p> <p> ASK if they have any questions about receiving an 820-833C work item.</p>
<p>Example Work Item 1— Determine the Appropriate Steps to Process the 820-833C Work Item</p> <p></p> <ul style="list-style-type: none"> Determine if there is a match between the corporate record and SSA inquiry to verify death of beneficiary. 	<p>DISPLAY slide 13. "Example Work Item 1—Determine the Appropriate Steps to Process the 820-833C Work Item"</p> <p></p> <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p>



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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> Is the deceased a Veteran or a survivor? 	<p>EXPLAIN that for the purposes of all occurrences of this work item, the PMC VSR needs to access the SHARE print and put a copy of it into the file.</p> <ul style="list-style-type: none"> If unable to verify date of death in SHARE, check CAPRI or VBMS (including the Notes tab) for date of death. The work item is not sufficient; there must also be verification to confirm the work item. If death cannot be confirmed, then due process must be issued. <p>EXPLAIN that if a surviving child has his or her own award, they would be considered during the processing of an 820-833C work item.</p> <p></p> <p>DEMONSTRATE, using Example Work Item 1, how a PMC VSR would determine the appropriate steps to process an 820-833C work item.</p> <p></p> <p>ASK if they have any questions about determining the steps to process Example Work Item 1 before moving on to the required actions to process the 820 work item.</p>
<p>Example Work Item 1— Perform the Required Actions to Process the 820-833C Work Item</p> <p></p> <ul style="list-style-type: none"> Process FNOD for a Veteran. 	<p>DISPLAY slide 14. “Example Work Item 1—Perform the Required Actions to Process the 820-833C Work Item”</p> <p></p> <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p>






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PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none">○ Confirm spouse is still living.○ Confirm spouse is proper recipient of automated burial payment, MOD, and potential DIC.○ If spouse is incorrect in system, then go to Participant Profile to correct.• Clear 820 work item for a non-Veteran, if not already completed.• Process EP 137 for a non-Veteran.• Determine if there are accrued benefits.	<p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Confirm the End Product (EP) code is correct• Determine if accrued funds are payable• Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson's job aid)• Process 810 series work items <p></p> <p>EXPLAIN that at this point, the PMC VSR is only establishing if accrued funds may be available.</p> <ul style="list-style-type: none">• If so, they will notify the estate in the notification letter.• The estate must apply for the accrued benefits in order for a full determination and award. <p>EXPLAIN that, in the case of a deceased Veteran:</p> <ul style="list-style-type: none">• Entry of an FNOD into SHARE will generate an automated contemporaneous notice to the Veteran's estate.• When the PMC VSR clears the 820 work item, tasking for an 820-833C is complete and no further actions are required, unless there are accrued benefits to consider, which would require another letter. <p></p>

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PowerPoint Slides	Instructor Activities
	<p>DEMONSTRATE, using Example Work Item 1, how a PMC VSR would process this 820-833C work item.</p> <p style="text-align: center;"></p> <p>ASK if they have any questions about performing the required actions to process an 820-833C work item before discussing how to generate an award adjustment for the 820 work item.</p>
<p>Example Work Item 1—Process the FNOD</p> <p style="text-align: center;"></p> <ul style="list-style-type: none"> • Determine the date of termination of entitlement based on the first of the month of the date of death of the beneficiary. • Complete the FNOD for the Veteran. 	<p>DISPLAY slide 15. “Example Work Item 1—Process the FNOD”</p> <p style="text-align: center;"></p> <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Describe how to prepare an award action <p style="text-align: center;"></p> <p>DEMONSTRATE, using Example Work Item 1, how a PMC VSR would determine the date of termination of entitlement and generate an award adjustment based on an 820-833C work item.</p> <p style="text-align: center;"></p>




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PowerPoint Slides	Instructor Activities
	ASK if they have any questions about generating an award adjustment for a deceased beneficiary.




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PowerPoint Slides	Instructor Activities
<p data-bbox="159 296 597 407">Example Work Item 1— Prepare Contemporaneous Notice</p>  <ul data-bbox="159 556 673 926" style="list-style-type: none">• Prepare contemporaneous notice to the estate if accrued benefits are payable or there was a claim pending at death and enclose VA Form 21-601.• If there is possible eligibility for survivor's benefits, include VA Form 21-534 or VA Form 21-534EZ.	<p data-bbox="701 296 1242 407">DISPLAY slide 16. "Example Work Item 1—Prepare Contemporaneous Notice"</p>  <p data-bbox="701 556 1458 667">USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p> <p data-bbox="701 690 1398 888">EXPLAIN that, because there is no decision needed, nothing would be submitted to the Authorizer in the case of a Veteran death. Your Coach will show you how to release the notice according to local procedures.</p> <p data-bbox="701 911 1445 1108">NOTE: Do not enclose VA Form 4107, Your Rights to Appeal Our Decision, when sending a contemporaneous notice that benefits have been discontinued based on the reported death of the beneficiary.</p> <p data-bbox="701 1131 1463 1409">NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul data-bbox="701 1432 1437 1650" style="list-style-type: none">• Determine if accrued funds are payable• Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson's job aid.) <p data-bbox="701 1673 1417 1745">REFER trainees to M21-1 I.2.D.1.g (Contemporaneous Notice and Report of Death).</p> 





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Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>DEMONSTRATE, using Example Work Item 1, how a PMC VSR would prepare the contemporaneous notice regarding accrued benefits to the deceased beneficiary’s estate for an 820-833C work item according to local procedures.</p> <p>TELL trainees that they will document the amount of overpayment, if any, in the OBRA report according to local procedures.</p> <p align="center"></p> <p>EMPHASIZE:</p> <ul style="list-style-type: none"> • Which paragraphs to include and why. • Which templates to choose. • Which autotexts to include and how to insert them. <p align="center"></p> <p>ASK if they have any questions about preparing a contemporaneous notice to the deceased beneficiary’s estate based on the 820-833C work item.</p>
<p>Demonstration Example Work Item 2—Process an 820-833A SSA Death DOB Mismatch</p> <p>Example Work Item 2:</p> <ul style="list-style-type: none"> • {Name} • {Other information} 	<p>DISPLAY slide</p> <p>17. “Demonstration Example Work Item 2—Process an 820-833A SSA Death DOB Mismatch”</p> <p align="center"></p> <p>REMINDER: Populate this slide with demographic information about Example Work Item 2.</p> <p>INTRODUCE Example Work Item 2.</p> <p>SELECT one of the trainees to read the Example Work Item 1 information on the slide.</p>








Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>REMIND trainees that you will demonstrate how to process an 820-833A work item from start to finish. You will break after each section to take questions, so trainees should write their questions down and ask at the designated opportunities.</p>  <p>REFER trainees to the Processing an Award Adjustment job aid as a resource for steps to take to process an 820-833A work item.</p>
<p>Example Work Item 2— Determine Which 820 Series Work Item Was Received</p>  <ul style="list-style-type: none"> • Receive notice by Coach of 820-833A system-generated notification from SSA regarding death of beneficiary. • Confirm the claim label on the inquiry. 	<p>DISPLAY slide 18. "Example Work Item 2—Determine Which 820 Series Work Item Was Received"</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Validate Power of Attorney (POA)  <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would determine which 820-833A work item was received.</p>




Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	 <p>ASK if they have any questions about receiving an 820-833A work item.</p>
<p>Example Work Item 2— Determine the Appropriate Steps to Process the 820-833A Work Item</p>  <ul style="list-style-type: none"> • Determine if there is a match between the corporate record and SSA inquiry to verify death of beneficiary. • Review eFolder to determine correct date of birth. • Is the deceased a Veteran or a survivor? 	<p>DISPLAY slide 19. “Example Work Item 2—Determine the Appropriate Steps to Process the 820-833A Work Item”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>REMIND trainees that if a surviving child has his or her own award, they would be considered during the processing of an 820-833C work item.</p>  <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would determine the appropriate steps to process an 820-833A work item.</p>  <p>ASK if they have any questions about determining the steps to process Example Work Item 2.</p>
<p>Example Work Item 2— Perform the Required Actions to Process the 820-833A Work Item</p> 	<p>DISPLAY slide 20. “Example Work Item 2—Perform the Required Actions to Process the 820-833A Work Item”</p> 





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none">• Clear 820 work item, if not already completed.• Process EP 137 for a non-Veteran.• Determine if there are accrued benefits to consider.	<p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Confirm the End Product (EP) code is correct• Determine if accrued funds are payable• Process 810 series work items <p></p> <p>REMIND trainees that they may receive other work items at the same time they receive the 820 work item, so they need to confirm that the EP they establish is correct.</p> <p>REMIND trainees that, in the case of a deceased Veteran, entry of an FNOD into SHARE will generate an automated contemporaneous notice to the Veteran's estate. When the PMC VSR clears the 820 work item, tasking for an 820-833C is complete and no further actions are required unless there are accrued benefits to consider, which would require another letter.</p> <p></p> <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would process this 820-833A work item.</p> <p></p>




Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>ASK if they have any questions about performing the required actions to process an 820-833A work item.</p>
<p>Example Work Item 2—Generate Award Adjustment</p>  <ul style="list-style-type: none"> Determine the date of termination of entitlement based on the date of death of the beneficiary. Generate award adjustment. 	<p>DISPLAY slide 21. “Example Work Item 2—Generate Award Adjustment”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> Describe how to prepare an award action  <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would determine the date of termination of entitlement and generate the award adjustment based on an 820-833A work item.</p>  <p>ASK if they have any questions about generating an award adjustment for a deceased beneficiary.</p>





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Example Work Item 2— Prepare Contemporaneous Notice</p>  <ul style="list-style-type: none">• Prepare contemporaneous notice to be sent to the deceased beneficiary's estate based on required 820-833A work item actions taken.• The letter must inform the estate that accrued benefits may be available if there was a claim pending at death or money was owed to the beneficiary at death.	<p>DISPLAY slide 22. "Example Work Item 2—Prepare Contemporaneous Notice"</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Determine if accrued funds are payable• Create decision notice• Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson's job aid.)  <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would prepare the notification letter to the deceased beneficiary's estate for an 820-833A work item according to local procedures.</p> <p>NOTE: Do not enclose VA Form 4107, Your Rights to Appeal Our Decision, when sending a contemporaneous notice that benefits have been discontinued based on the reported death of the beneficiary.</p>

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	 <p>EMPHASIZE:</p> <ul style="list-style-type: none"> • Which paragraphs to include and why. • Which templates to choose. • Which autotexts to include and how to insert them.  <p>ASK if they have any questions about preparing a notification letter to the deceased beneficiary's estate based on the 820-833A work item.</p>
<p>Example Work Item 2—Submit the Outcomes of the 820-833A Work Item to the Authorizer</p> <ul style="list-style-type: none"> • Submit the generated EP 137, including the contemporaneous notice to the estate, to the Authorizer for review according to local procedures. 	<p>DISPLAY slide 23. "Example Work Item 2—Submit the Outcomes of the 820-833A Work Item to the Authorizer"</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833A work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson's job aid.)





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<div data-bbox="703 289 802 394" data-label="Image"> </div> <p>DEMONSTRATE, using Example Work Item 2, how a PMC VSR would submit the outcomes of an 820-833A work item to the Authorizer for review.</p> <p>TELL trainees that they will document the amount of overpayment, if any, in the OBRA report according to local procedures.</p> <div data-bbox="703 688 802 793" data-label="Image"> </div> <p>EXPLAIN that after creating the contemporaneous notice, the trainees should:</p> <ul style="list-style-type: none"> • Make any final annotations about the award. • Save their completed work in appropriate locations for review by the Authorizer according to local procedures. <div data-bbox="703 1094 802 1199" data-label="Image"> </div> <p>ASK if they have any questions about submitting the outcomes of the 820-833A work item to the Authorizer.</p> <p>TELL trainees that the next demonstration will help them understand 820 work items in cases where a Veteran is married to another Veteran.</p>
<p>Demonstration Example Work Item 3—Process an 820-738 FNOD Vet Married to Vet</p> <p>Example Work Item 3:</p> <ul style="list-style-type: none"> • {Name} • {Other information} 	<p>DISPLAY slide</p> <p>24. "Demonstration Example Work Item 3—Process an 820-738 FNOD Vet Married to Vet"</p> <div data-bbox="703 1646 802 1751" data-label="Image"> </div> <p>REMINDER: Populate this slide with demographic information about Example Work Item 3.</p>





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>INTRODUCE Example Work Item 3.</p> <p>SELECT one of the trainees to read the Example Work Item 3 information on the slide.</p> <p>REMIND trainees that you will demonstrate how to process an 820-738 work item from start to finish. You will break after each section to take questions, so trainees should write their questions down and ask at the designated opportunities.</p>  <p>REFER trainees to the Processing an Award Adjustment job aid as a resource for steps to take to process an 820-738 work item.</p>
<p>Example Work Item 3— Determine Which 820 Series Work Item Was Received</p>  <ul style="list-style-type: none"> • Receive notice by Coach of 820-738 system-generated notification from SSA regarding death of Veteran spouse. • Confirm the claim label on the inquiry. 	<p>DISPLAY slide</p> <p>25. “Example Work Item 3—Determine Which 820 Series Work Item Was Received”</p>  <p>EXPLAIN that, in the case of a Veteran married to a Veteran, the terms “Veteran spouse” or “surviving Veteran” are used in M21-1 V.iii.4.2 (Making Payments in Veteran-Married-to-Veteran Improved Pension Cases).</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-738 work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to</p>



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Validate Power of Attorney (POA)  <p>DEMONSTRATE, using Example Work Item 3, how a PMC VSR would determine which 820-738 work item was received.</p>  <p>ASK if they have any questions about receiving an 820-738 work item.</p>
<p>Example Work Item 3— Determine the Appropriate Steps to Process the 820-738 Work Item</p>  <p>Determine if there is a match between the corporate record and SSA inquiry to verify death of Veteran.</p>	<p>DISPLAY slide 26. "Example Work Item 3—Determine the Appropriate Steps to Process the 820-738 Work Item"</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-738 work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Verify proof of death of Veteran <p>REMIND trainees that both partners are Veterans under this work item.</p>




Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p data-bbox="703 281 802 373"> DEMO</p> <p data-bbox="703 401 1463 514">DEMONSTRATE, using Example Work Item 3, how a PMC VSR would determine the appropriate steps to process an 820-738 work item.</p> <p data-bbox="703 541 802 634"> ASK</p> <p data-bbox="703 661 1446 737">if they have any questions about determining the steps to process Example Work Item 3.</p>





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Example Work Item 3— Perform the Required Actions to Process the 820-738 Work Item</p>  <ul style="list-style-type: none">• For deceased Veteran:<ul style="list-style-type: none">○ Go to the deceased Veteran’s file number in SHARE.○ Process FNOD for a Veteran.○ Determine if there are accrued benefits to consider.• For surviving Veteran:<ul style="list-style-type: none">○ Go to the surviving Veteran’s file number in VBMS.○ CEST EP 137 to remove Veteran’s spouse.○ Clear 820 work item, if not already completed.	<p>DISPLAY slide</p> <p>27. “Example Work Item 3—Perform the Required Actions to Process the 820-738 Work Item”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-738 work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Confirm the End Product (EP) code is correct• Process a Veteran-married-to-Veteran claim• Determine if accrued funds are payable• Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson’s job aid.)• Process 810 series work items  <p>EXPLAIN that, in the case of a deceased Veteran, entry of an FNOD into SHARE will generate an automated contemporaneous notice to the Veteran’s estate.</p> <ul style="list-style-type: none">• When the PMC VSR clears the 820 work item, it is important to determine if there are accrued benefits to consider because they would require an additional letter.



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<ul style="list-style-type: none"> The additional letter must inform the estate that accrued benefits may be available if there was a claim pending at death. <p>EXPLAIN that in this case (Vet to Vet), the surviving Veteran may be considered for either live or survivor’s pension.</p> <ul style="list-style-type: none"> The income and medical expenses must be considered in the remaining Veteran’s live pension. Take note that life insurance is countable on live pension but not on survivor pension and you may need to send a VA Form 21-534 to the remaining Veteran for alternate entitlement.  <p>DEMONSTRATE, using Example Work Item 3, how a PMC VSR would process this 820-738 work item.</p>  <p>ASK if they have any questions about performing the required actions to process an 820-738 work item.</p>
<p>Example Work Item 3—Generate Award Adjustment</p>  <ul style="list-style-type: none"> Determine the date of removal of dependent based on the date of death of deceased Veteran spouse. If award is: 	<p>DISPLAY slide 28. “Example Work Item 3—Generate Award Adjustment”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-738 work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with</p>





Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none">○ Increasing, generate award adjustment.○ Decreasing, but Veteran notified VA of death of spouse, generate award adjustment.○ Decreasing, but Veteran did not notify VA of death of spouse, issue due process.	<p>the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Describe how to prepare an award action• Determine award adjustment based on change in dependency• Apply due process provisions to a claim <p>EXPLAIN that trainees should also look for evidence submitted directly from the Veteran regarding spouse's death, in which case due process would not need to be issued.</p> <p></p> <p>DEMONSTRATE, using Example Work Item 3, how a PMC VSR would determine the date of termination of entitlement and generate an award adjustment based on an 820-738 work item.</p> <p>EXPLAIN that if the notice of death is from a third party, due process may be needed if removal of the dependent causes a reduction in the award.</p> <ul style="list-style-type: none">• See Processing an Award Adjustment job aid for an 820-738 work item for action steps in VBMS-A concerning due process.• The final action to remove the dependent cannot be taken until the conclusion of the due process period. <p></p> <p>ASK if they have any questions about generating an award adjustment for a deceased Veteran spouse.</p>

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Example Work Item 3—Submit the Outcomes of the 820-738 Work Item to the Authorizer</p> <ul style="list-style-type: none">• Create the letter.• Submit the outcomes, including the letter, to the Authorizer for review according to local procedures. 	<p>DISPLAY slide</p> <p>29. “Example Work Item 3—Submit the Outcomes of the 820-738 Work Item to the Authorizer”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-738 work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none">• Create decision notice  <p>DEMONSTRATE, using Example Work Item 3, how a PMC VSR would submit the outcomes of an 820-738 work item to the Authorizer for review.</p> <p>TELL trainees that they will document the amount of overpayment, if any, in the OBRA report according to local procedures.</p>  <p>EXPLAIN that after creating the letter, the trainees should:</p> <ul style="list-style-type: none">• Make any final annotations about the award.• Save their completed work, including the letter, in appropriate locations for review by the Authorizer according to local procedures.



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	 <p>ASK if they have any questions about submitting the outcomes of the 820-738 work item to the Authorizer.</p> <p>TELL trainees that the last step in the process applies to all 820 (Notice of Death) work items—OBRA reporting.</p>
<p>820 Series (Notice of Death) Work Items—Document for OBRA Reporting</p> 	<p>DISPLAY slide 30. "820 Series (Notice of Death) Work Items—Document for OBRA Reporting"</p> <p>EXPLAIN that after trainees have processed any 820 series (notice of death) work item, OBRA reporting will be documented based on local policy.</p> <p>TELL trainees that their Team leaders will advise them of local policy when they begin processing 820 series (notice of death) work items at their station.</p>  <p>ASK if they have any questions about documenting for OBRA reporting.</p> <p>TELL trainees they will now have the opportunity to work through an 820-833C work item in the Guided Practice Exercise.</p>
<p>Guided Practice Exercise Overview (1 of 2)</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Process Example Work Item 4 from beginning to end. 	<p>DISPLAY slide 31. "Guided Practice Exercise Overview (1 of 2)"</p> <p>REMINDE trainees that in this portion of the lesson, you will again refer to lessons relating to each step of the process and provide answers to any trainee questions.</p>



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> ○ Use the job aids, references, and systems available. ○ Select a partner before beginning the exercise to confer with after completing each step individually. ○ Consult with instructors for assistance. ○ Be prepared to discuss your results with the class. 	<p>DIRECT trainees to select a partner to work with during this exercise:</p> <ul style="list-style-type: none"> • After each person has completed each step of the process individually, the trainee pairs will then confer with each other about their findings, answers, or conclusions. • Trainees should be prepared to share their results with the class. <p>ENCOURAGE trainees to consult with the instructors if they need assistance.</p> <p>REMIND instructors to provide direction, but not the outcomes.</p> <div style="text-align: center;"></div> <p>NOTE: Recall that you will need additional instructors to achieve a 1:4 instructor/trainee ratio during this portion of the lesson.</p> <div style="text-align: center;"></div> <p>REFER to <i>Lesson 16: Appendix A</i> for references and job aids.</p> <p>ENCOURAGE trainees to keep this and all other job aids used during this Guided Practice Exercise handy as the trainees will refer to them later in the lesson as they practice processing a claim.</p>
<p>Guided Practice Exercise Overview (2 of 2)</p> <ul style="list-style-type: none"> • This exercise includes the following parts of the 820 series work item process: <ul style="list-style-type: none"> ○ Determine which 820 series work item was received. 	<p>DISPLAY slide 32. "Guided Practice Exercise Overview (2 of 2)"</p> <p>TELL trainees that they will now be working through the same steps to process an 820 series work item as they viewed in the demonstration, but using a different claim.</p> <p>SELECT a trainee to read the bullet points on the slide.</p>




Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> ○ Determine the appropriate steps to process the 820 series work item. ○ Perform the required actions to process the 820 series work item. ○ Create notification letter, if applicable. ○ Submit the outcomes of the 820 series work item to the Authorizer. 	
<p>Guided Practice Exercise Example Work Item 4—Process 820-833C Work Item</p> <p>Guided Practice Exercise Example Work Item 4:</p> <ul style="list-style-type: none"> • {Name} • {Other information} 	<p>DISPLAY slide 33. "Guided Practice Exercise Example Work Item 4—Process an 820-833C Series Work Item"</p>  <p>REMINDER: Populate this slide with demographic information about Example Work Item 4.</p> <p>INTRODUCE Example Work Item 4.</p> <p>SELECT a trainee to read the Example Work Item 4 information on the slide.</p> <p>NOTE: All answers provided in this section will be based on the instructor-provided claim for this exercise.</p>  <p>ASK trainees if they have any questions before beginning the Guided Practice Exercise.</p>
<p>Example Work Item 4—Determine Which 820 Series Work Item Was Received</p> <ul style="list-style-type: none"> • Instructions: 	<p>DISPLAY slide 34. "Example Work Item 4—Determine Which 820 Series Work Item Was Received"</p>



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> ○ Perform the steps to determine which 820 series work item was received for Example Work Item 4. ○ Use the job aids, references, and systems available. ○ Confer with your partner. ○ Be prepared to discuss your results with the class. <ul style="list-style-type: none"> • Time allowed: 5 minutes 	<p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p>  <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Validate Power of Attorney (POA) <p>DIRECT trainees to Example Work Item 4.</p> <p>DIRECT trainees to perform this step individually before comparing their outcome with their partner. Trainees should be prepared to share their answers with the class.</p> <p>ASSIST trainees by pointing them to the relevant job aids, references, and systems. Do NOT provide the outcomes until a majority of the trainees have completed the step.</p>  <p>ASK if they have any questions about receiving an 820-833C series work item.</p> <p>DISCUSS answers to the trainees' questions.</p>
<p>Example Work Item 4— Determine the Appropriate Steps to Process the 820-833C Work Item (1 of 2)</p> <ul style="list-style-type: none"> • Instructions: 	<p>DISPLAY slide</p> <p>35. "Example Work Item 4—Determine the Appropriate Steps to Process the 820-833C Work Item (1 of 2)"</p> 


Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<ul style="list-style-type: none"> ○ Perform the steps to determine the appropriate steps to process the 820-833C work item for Example Work Item 4. ○ Use the job aids, references, and systems available. ○ Confer with your partner. ○ Be prepared to discuss your results with the class. <ul style="list-style-type: none"> • Time allowed: 10 minutes 	<p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p> <p>DIRECT trainees to Example Work Item 4.</p> <p>DIRECT trainees to perform this step individually before comparing their outcome with their partner. Trainees should be prepared to share their answers with the class.</p> <p>ASSIST trainees by pointing them to the relevant job aids, references, and systems. Do NOT provide the outcomes until a majority of the trainees have completed the step.</p>
<p>Example Work Item 4— Determine the Appropriate Steps to Process the 820-833C Work Item (2 of 2)</p> <ul style="list-style-type: none"> • Is there is a match between the corporate record and SSA inquiry to verify death of beneficiary? • Is the deceased a Veteran or a survivor? 	<p>DISPLAY slide</p> <p>36. "Example Work Item 4—Determine the Appropriate Steps to Process the 820-833C Work Item (2 of 2)"</p> <div style="text-align: center;">  </div> <p>ASK the following questions about Example Work Item 4:</p> <ul style="list-style-type: none"> • Is there is a match between the corporate record and SSA inquiry to verify death of beneficiary? • Is the deceased a Veteran or a survivor? <p>PROVIDE feedback and remediation as necessary.</p> <div style="text-align: center;">  </div> <p>ASK if they have any questions about the appropriate steps to process the 820-833C work item.</p>


Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>DISCUSS answers to the trainees’ questions.</p>
<p>Example Work Item 4— Perform the Required Actions to Process the 820-833C Work Item</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Perform the required actions to process the 820 series work item for Example Work Item 4. ○ Use the job aids, references, and systems available. ○ Confer with your partner. ○ Be prepared to discuss your results with the class. • Time allowed: 20 minutes 	<p>DISPLAY slide</p> <p>37. “Example Work Item 4—Perform the Required Actions to Process the 820-833C Work Item”</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item—steps 4 through 7 in the job aid.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Confirm the End Product (EP) code is correct • Establish a claim (CEST) • Determine if accrued funds are payable • Describe how to prepare an award action • Apply due process provisions to a claim • Process 810 series work items <p>DIRECT trainees to Example Work Item 4.</p> <p>DIRECT trainees to perform this step individually before comparing their outcome with their partner. Trainees should be prepared to share their answers with the class.</p> <p>ASSIST trainees by pointing them to the relevant job aids, references, and systems. Do NOT provide the outcomes until a majority of the trainees have completed the step.</p> <p>PROVIDE feedback and remediation as needed.</p>


Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	 <p>ASK trainees what questions they have about performing the required actions to process an 820-833C work item.</p> <p>DISCUSS answers to the trainees' questions.</p>



Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Example Work Item 4—Prepare Contemporaneous Notice</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Perform the steps to prepare the contemporaneous notice to the deceased beneficiary’s estate for Example Work Item 4. ○ Use the job aids, references, and systems available. ○ Confer with your partner to assess each other’s notices. ○ Discuss differences in the notices. ○ Ask for guidance from the instructor if you identify discrepancies. • Time allowed: 15 minutes 	<p>DISPLAY slide</p> <p>38. “Example Work Item 4—Prepare Contemporaneous Notice”</p> <div style="text-align: center;">  </div> <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson’s job aid.) • Create decision notice • Determine if accrued funds are payable <p>DIRECT trainees to Example Work Item 4.</p> <p>DIRECT trainees to perform this step individually before comparing their outcome with their partner. Trainees should be prepared to share their answers with the class.</p> <p>ASSIST trainees by pointing them to the relevant job aids, references, and systems. Do NOT provide the outcomes until a majority of the trainees have completed the step.</p> <p>DIRECT trainees to work with their partner to assess each other’s contemporaneous notice. They should ask for guidance from the instructor as needed when they identify discrepancies.</p>




Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>PROVIDE feedback and remediation as needed.</p>  <p>ASK trainees what questions they have about preparing contemporaneous notices for an 820-833C work item.</p> <p>DISCUSS answers to the trainees' questions.</p>
<p>Example Work Item 4—Submit the Outcomes of the 820-833C Work Item to the Authorizer</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Perform the steps according to local procedures to submit the Outcomes of the 820-833C Work Item to the Authorizer for Example Work Item 4. ○ Use the job aids, references, and systems available. ○ Confer with your partner. ○ Be prepared to discuss your results with the class. • Time allowed: 5 minutes 	<p>DISPLAY slide 39. "Example Work Item 4—Submit the Outcomes of the 820-833C Work Item to the Authorizer"</p>  <p>USE the steps provided in the Processing an Award Adjustment job aid for an 820-833C work item.</p> <p>NOTE: Previous lessons provided training on parts or all of this step. <i>Lesson 16: Appendix A</i> lists all of the related prerequisite Learning Objectives with the lessons, job aids, and references. Refer trainees to the items below from Appendix A to remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"> • Apply due process provisions to a claim (Note: Although due process is not applicable, contemporaneous notices are covered under this lesson's job aid.) • Create decision notice <p>DIRECT trainees to Example Work Item 4.</p> <p>DIRECT trainees to perform this step individually before comparing their outcome with their partner's. Trainees should be prepared to share their answers with the class.</p>

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	<p>ASSIST trainees by pointing them to the relevant job aids, references, and systems. Do NOT provide the outcomes until a majority of the trainees have completed the step.</p> <p>PROVIDE feedback and remediation as needed.</p> <p>REMIND trainees to finalize their annotations about the award and save their completed work in appropriate locations for review by the authorizer according to local procedures.</p>  <p>ASK trainees what questions they have about submitting the outcomes of the 820-833C work item to the Authorizer.</p> <p>DISCUSS answers to the trainees' questions.</p> <p>REMIND trainees to document for OBRA reporting based on their local policy.</p>
<p>Questions?</p> 	<p>DISPLAY slide 40. "Questions?"</p>  <p>ASK if there are any final questions about the Guided Practice Exercise or anything else covered in this lesson.</p> <p>DISCUSS answers to the trainees' questions then move on to the summary of the lesson.</p>
<p>Lesson Summary (1 of 2)</p> <p>What are the main tasks a PMC VSR must accomplish to process an 820 series work item correctly?</p>	<p>DISPLAY slide 41. "Lesson Summary (1 of 2)"</p> <p>REVIEW the main objective of this lesson: to process an 820 series work item.</p> <p>REVIEW the key points of the lesson by asking the trainees to answer the following question: What</p>

Lesson 16: Process 820 Series Work Items (Notice of Death)

Lesson Plan

PowerPoint Slides	Instructor Activities
	are the main tasks a PMC VSR must accomplish to process an 820 series work item correctly?
<p>Lesson Summary (2 of 2)</p> <ul style="list-style-type: none"> • <i>Determine which 820 series work item was received.</i> • <i>Determine the appropriate steps to process the 820 series work item.</i> • <i>Perform the required actions to process the 820 series work item.</i> • <i>Create notification letter, if applicable.</i> • <i>Submit the outcomes of the 820 series work item to the Authorizer.</i> 	<p>DISPLAY slide 42. "Lesson Summary (2 of 2)"</p> <p>PROVIDE the following answers as listed on the slide:</p> <ul style="list-style-type: none"> • <i>Determine which 820 series work item was received.</i> • <i>Determine the appropriate steps to process the 820 series work item.</i> • <i>Perform the required actions to process the 820 series work item.</i> • <i>Create notification letter, if applicable.</i> • <i>Submit the outcomes of the 820 series work item to the Authorizer.</i>
<p>What's Next?</p> <p>Knowledge Check: Process 820 Series Work Items (Notice of Death)</p>	<p>DISPLAY slide 43. "What's Next?"</p> <p>EXPLAIN the upcoming Knowledge Check: Process 820 Series Work Items (Notice of Death).</p>