



# Lesson 17: Process 850 Series Work Items

PMC VSR Advanced Core Course  
Phase 6: Processing Claims



# You Are Here





# Scenario—850 Series Work Items

## SCENARIO:

PMC VSR Miranda Smith receives notice from her Coach that an 850A work item is pending for Veteran Don Beckett. Miranda determines, based on changes from SSA indicating that social security income and Medicare Part B increased for 2017, that the award requires a manual adjustment for COLA. Miranda then CESTs an EP 696 and an EP 157/150 to perform the necessary actions to update the award. Once the claim has been authorized, the system will automatically clear the 850A since it cannot be cleared manually.



# Why It Matters!

It is important to know how to process 850 series work items because certain award adjustments or benefits might not be made automatically and need to be adjusted manually to ensure claimants receive the correct award amount.

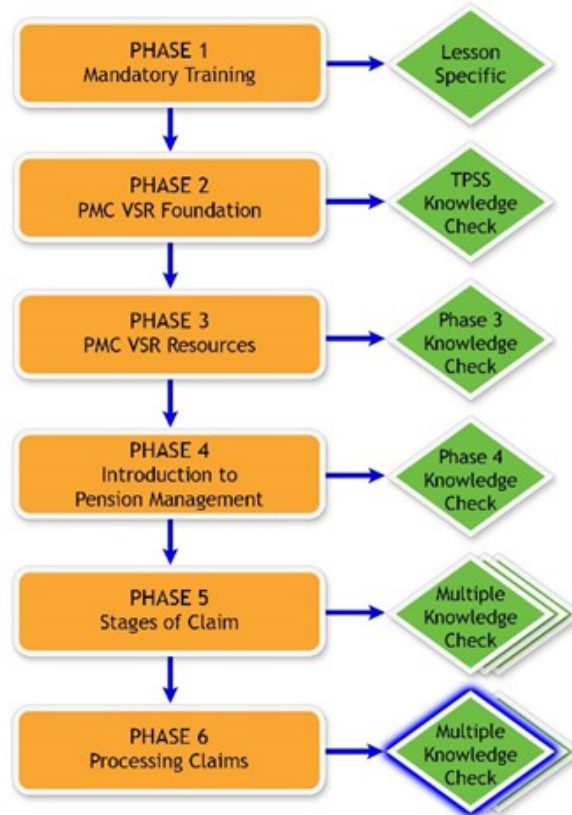


# Lesson Objectives

- Process 850 series work items:
  - Determine which 800 series work item was received.
  - Determine the reason for the 850 series work item.
  - Determine the appropriate steps to take to process the 850 series work item.
  - Perform the required actions to process the 850 series work item.
  - Submit the outcomes of the 850 series work item to the Authorizer.



# Knowledge Check





# 800 Series Work Items Review Activity—Part A

- Instructions:
  - Complete Appendix B: Part A—Match the Title to the Correct Work Series Status Category.
  - Given the title description, select the correct status category.
  - Use the references listed in Appendix B, Part A.
  - Be prepared to share your answers with the class.
- Time allowed: 5–7 minutes



# 800 Series Work Items Review Activity—Part A Answers

1. Explanation of Audit Messages/Notice of Death  
*c. 820 series*
2. Bureau of Federal Prison  
*e. 840 series*
3. Manual Payment Adjustments  
*d. 850 series*
4. Notice of Benefit Payment Transaction  
*c. 810 series*





# 800 Series Work Items Review Activity—Part B

- Instructions:
  - Divide into pairs.
  - Complete Appendix B: Part B—Which Status Category and Claim Label Is It? Worksheet.
  - Read the scenarios and identify the status category and claim label for each scenario.
  - Confer with your partner and write your answers in the worksheet.
  - Use the references listed in Appendix B, Part B.
  - Be prepared to share your finished activity with other groups.
- Time allowed: 15 minutes



# 800 Series Work Items Review Activity—Part B Answers

- **Scenario 1** *810 series 603*
- **Scenario 2** *820 series 833A*
- **Scenario 3** *850 series 850A*
- **Scenario 4** *810 series 626*
- **Scenario 5** *810 series 631L*



# Characteristics of Processing 850 Series Work Items

- System-generated notifications requiring a manual payment adjustment
- Usually involve manual adjustment for changes in COLA



# Common Reasons a COLA may not Automatically Generate

- Veterans and survivor's pension benefits when the income reported from SSA would cause a decrease to VA benefits
- DIC benefits when an apportionment is being paid
- Veterans pension benefits when an apportionment is being paid
- Any award with a future award line (e.g. dependent is removed from an award on his/her 18th birthday)



# 850 Series Work Items Claim Label

850A: Legislative Rate  
Adjustment





# 850A: Legislative Rate Adjustment (1 of 3)

- Reason: this generates when a cost of living adjustment (COLA) is not automatically given to a beneficiary.
- Actions:
  - CEST an EP 696 to control the 850A work item.
  - Review beneficiary's award information in SHARE for year working in to ensure there was a change for the COLA that corresponds to the date of the 850A work item (no December line—no financial rate change).
  - If the Corporate award shows a 12-01-YYYY line, no further action is necessary.





## 850A: Legislative Rate Adjustment (2 of 3)

- Actions:
  - If there is not a 12-01-YYYY line for the current year, further action is needed.
  - If there is no additional EP pending, CEST one.
  - Determine whether income is being counted.
  - If the income or medical expenses need to be updated, CEST a companion EP 150/157 in addition to the EP 696 and process both concurrently to adjust the award.



## 850A: Legislative Rate Adjustment (3 of 3)

- Actions:
  - After entering the information—if the change causes a decrease in benefits—clear the EP 150/157 and CEST an EP 607 to apply due process provisions.
  - The final award must be processed under the EP 696 in order to clear the 850A work item.





# COLA and Effective Dates

- If COLA creates a decrease to an award in December, “protect the rate” by deferring the adjustment until January.
- If medical expenses will cause an increase, apply Omnibus also and defer the adjustment until February instead of January.



# Demonstration and Guided Practice

- **Demonstration**—Instructor processes example work items from start to finish with opportunities for questions.
- **Guided Practice**—Trainees process a work item with questions and feedback/remediation.



# Demonstration Work Item— 850 Series Work Items

- Demonstration—
  - {Work item}
  - {Other information}





# Demonstration Work Item— Determine Which 800 Series Work Item Was Received





# Demonstration Work Item—Determine the Reason for the 850 Series Work Item

- Work item was not cleared previously, but no update is needed
- An update is needed in the system
- An award adjustment is needed





# Demonstration Work Item— Determine the Appropriate Steps to Take to Process the 850 Series Work Item





# Demonstration Work Item— Perform the Required Actions to Process the 850 Series Work Item





# Demonstration Work Item— Submit the Outcomes of the 850 Series Work Item to the Authorizer







# Guided Practice Exercise Overview — 850 Series Work Items (1 of 2)

- Instructions:
  - Process 850 series work item from beginning to end.
  - 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.
  - Take credit in ASPEN as directed at the completion of the exercise.



# Guided Practice Exercise Overview — 850 Series Work Items (2 of 2)

- This exercise includes the following parts of the work items process:
  - Determine which 800 series work item was received.
  - Determine the reason for the 850 series work item.
  - Determine the appropriate steps to take to process the 850 series work item.
  - Perform the required actions to process the 850 series work item.
  - Submit the outcomes of the 850 series work item to the Authorizer.



# Guided Practice Exercise— 850 Series Work Items

- Guided Practice Exercise Example—
  - {Work item}
  - {Other information}





# Guided Practice Exercise—Determine Which 800 Series Work Item Was Received

- Instructions:
  - Determine which 800 series work item was received.
  - Confer with your partner.
  - Be prepared to discuss your results with the class.
- Time allowed: 5 minutes



# Guided Practice Exercise—Determine the Reason for the 850 Series Work Item

- Instructions:
  - Determine the reason for the work item.
  - Confer with your partner.
  - Be prepared to discuss your results with the class.
- Time allowed: 15 minutes



# Guided Practice Exercise— Determine the Appropriate Steps to Take to Process the 850 Series Work Item

- Instructions:
  - Determine the steps to take to process the 850 series work item.
  - Use the job aids, references, and systems available.
  - Confer with your partner.
  - Be prepared to discuss your results with the class.
- Time allowed: 15 minutes



# Guided Practice Exercise— Perform the Required Actions to Process the 850 Series Work Item

- Instructions:
  - Perform the required actions to process the specific claim label for the 850 series work item.
  - Use the job aids, references, and systems available.
  - Confer with your partner to assess each other's steps to process the work item.
  - Ask for guidance from the instructor if you identify discrepancies.
- Time allowed: 40 minutes



# Guided Practice Exercise—Submit the Outcomes of the 850 Series Work Item to the Authorizer

- Instructions:
  - Finalize notes for work items and save completed work in appropriate locations for review by Authorizer.
  - Use the job aids, references, and systems available.
- Time allowed: 10 minutes





# Questions?





# Lesson Summary (1 of 2)

What are the main tasks a PMC VSR must accomplish to process 850 series work items?



## Lesson Summary (2 of 2)

What are the main tasks a PMC VSR must accomplish to process 850 series work items?

- *Determine which 800 series work item was received.*
- *Determine the reason for the 850 series work item.*
- *Determine the appropriate steps to take to process the 850 series work item.*
- *Perform the required actions to process the 850 series work item.*
- *Submit the outcomes of the 850 series work item to the Authorizer.*



# What's Next?

Knowledge Check: Process 850 Series Work Items