



## PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course  
Phase 6: Processing Claims

# **Lesson 17: Process 850 Series Work Items (Manual Payment Adjustments)**

Lesson Plan

August 21, 2017

Version 1.0

## Lesson 17: Process 850 Series Work Items (Manual Payment Adjustments)

### Lesson Plan

## Process 850 Series Work Items (Manual Payment Adjustments)

### 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 to process 850 series work items through demonstration, practice, and feedback.
Prerequisite Training Requirements:	Prior to taking the Process 850 Series Work Items lesson, trainees must complete the entry-level course Phases 1–5, and Phase 6, lessons 1–16. (Refer to the <b>Master Course Map</b> 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"><li>• <b>Master Course Map</b> learning aid</li><li>• M21-1 III.ii.1.B.2.c (Placing Claims and 800 Series Work Items Under EP Control)</li><li>• M21-1 III.v.3.B.1.k (Handling Allegations of Hardship When an Apportionment Is Already in Place)</li><li>• M21-1 III.v.10.A.1.i (850WI Claim Label)</li><li>• M21-1 III.v.10.A.2 (Processing 800 Series Work Items)</li><li>• M21-1 III.v.10.A.3.a (Adjusting an Award to Reflect a COLA)</li><li>• M21-1 V.iii.1.A.5.I (Example 1: Handling a MAPR and Income Change Effective the Same Date)</li><li>• M21-4 Appendix C, Section I.b (Index of Claim Labels)</li><li>• <b>Processing an Award Adjustment</b> job aid</li><li>• See <i>Lesson 17: Appendix A</i> for references introduced in earlier lessons.</li></ul>
Technical Competencies:	<ul style="list-style-type: none"><li>• Program Benefits and Eligibility (PMC VSR)</li><li>• Processing Claims (PMC VSR)</li><li>• VBA Applications (PMC VSR)</li></ul>

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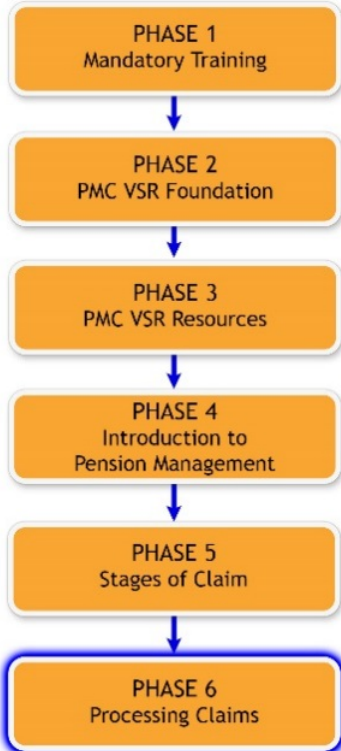

Topic	Description
	<ul style="list-style-type: none"> <li>• Income Counting and Net Worth</li> </ul>
Knowledge Check:	Phase 6, Lesson 17 Knowledge Check: Process 850 Series Work Items
Lesson Objectives:	<ul style="list-style-type: none"> <li>• Process 850 series work items.               <ul style="list-style-type: none"> <li>○ Determine which 800 series work item was received.</li> <li>○ Determine the reason for the 850 series work item.</li> <li>○ Determine the appropriate steps to take to process the 850 series work item.</li> <li>○ Perform the required actions to process the 850 series work item.</li> <li>○ Submit the outcomes of the 850 series work item to the Authorizer.</li> </ul> </li> </ul>
What You Need:	<ul style="list-style-type: none"> <li>• Lesson Plan</li> <li>• <b>Master Course Map</b> learning aid</li> <li>• Additional instructors to achieve a 1:4 instructor/trainee ratio during the Guided Practice portion of the lesson</li> <li>• Slides</li> <li>• Projector</li> <li>• Whiteboard/flip chart with different colored markers</li> <li>• Access to the <b>Processing an Award Adjustment</b> job aid from VSR Assistant</li> <li>• See <i>Lesson 17: Appendix A</i> for other job aids</li> <li>• Applicable VBA applications used in job aids and references listed in Appendix A</li> <li>• Appendix B: Activity Worksheet</li> <li>• Case 1 for Demonstration—(850A manually adjust for COLA):               <ul style="list-style-type: none"> <li>○ DIC award with apportionments adjust for COLA</li> </ul> </li> <li>• Case 2 for Guided Practice Exercise—(850A manually adjust for COLA):               <ul style="list-style-type: none"> <li>○ Pension award—change in income/medical expenses</li> </ul> </li> </ul>

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Topic	Description
	requires adjustment for COLA <ul style="list-style-type: none"> <li>o Due process not required (no decrease in benefits)</li> </ul>


**Instructor Notes**

This lesson provides trainees with instruction, practice, and the needed references to process 850 series work items. Trainees will also be required to demonstrate how to use the systems for processing the work items.

PowerPoint Slides	Instructor Activities
<p><b>Lesson 17: Process 850 Series Work Items</b></p>	<p><b>DISPLAY</b> slide</p> <p>1. "Lesson 17: Process 850 Series Work Items"</p> <p><b>INTRODUCE</b> yourself as the instructor.</p> <p><b>INTRODUCE</b> the lesson.</p>
<p><b>You Are Here</b></p>  <pre> graph TD     P1[PHASE 1 Mandatory Training] --&gt; P2[PHASE 2 PMC VSR Foundation]     P2 --&gt; P3[PHASE 3 PMC VSR Resources]     P3 --&gt; P4[PHASE 4 Introduction to Pension Management]     P4 --&gt; P5[PHASE 5 Stages of Claim]     P5 --&gt; P6[PHASE 6 Processing Claims]     style P6 stroke:#0000FF,stroke-width:2px                     </pre>	<p><b>DISPLAY</b> slide</p> <p>2. "You Are Here"</p>  <p><b>REFER</b> to the <b>Master Course Map</b> learning aid in the Trainee Guide.</p> <p><b>DESCRIBE</b> the diagram.</p> <p><b>REMIN</b>d trainees that all of the lessons in Phase 6 will provide demonstrations and practice of the skills learned in Phases 4 and 5, integrated with new knowledge and skills required to process each claim type.</p> <p><b>REMIN</b>d trainees that they:</p> <ul style="list-style-type: none"> <li>• Must use the M21-1 and the job aids in the VSR Assistant to be successful in these lessons.</li> <li>• Should keep M21-1 in CPKM and the VSR Assistant open and ready to use throughout this and subsequent lessons.</li> </ul>

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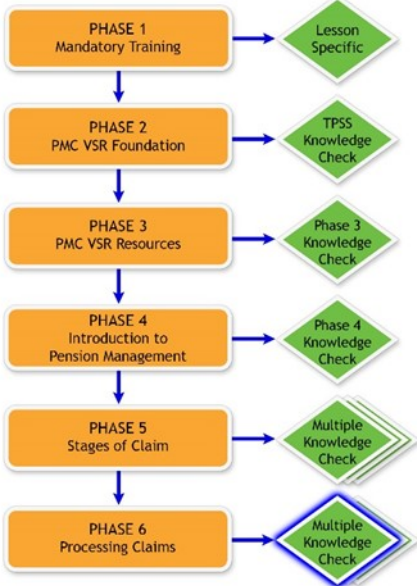

### Lesson Plan

PowerPoint Slides	Instructor Activities
	 <p><b>NOTE TO INSTRUCTOR:</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• This training is designed to build skills gradually, as well as establish consistent procedures across PMCs.</li> <li>• Do not confuse the trainees by processing a work item the way you “have always done it.”</li> <li>• The trainees need consistency in order to master the skills to perform the job.</li> </ul>
<p><b>Scenario—850 Series Work Item</b></p> <p>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 150/157 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.</p>	<p><b>DISPLAY</b> slide</p> <p><b>3.</b> “Scenario—850 Series Work Item”</p> <p><b>SELECT</b> one of the trainees to read the scenario on the slide.</p> <p><b>DISCUSS</b> the scenario, highlighting the following about 850 series work items:</p> <ul style="list-style-type: none"> <li>• How work items are received (<i>assigned by Coach</i>)</li> <li>• Possible issues the work items may involve (<i>manual payment adjustment</i>)</li> <li>• Steps the PMC VSR may have to take to resolve the work items (<i>CEST appropriate EP(s); update system to adjust award</i>)</li> </ul> <p><b>EXPLAIN</b> that this lesson will discuss all of these aspects and more in greater detail in the following slides.</p>

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PowerPoint Slides	Instructor Activities
<p><b>Why It Matters!</b></p> <p>It is important to know how to process 850 series work items because certain award adjustments or benefits might not be made automatically. They are adjusted manually to ensure beneficiaries receive the correct award amount.</p>	<p><b>DISPLAY</b> slide  <b>4. "Why It Matters!"</b></p> <p><b>EXPLAIN</b> that 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 beneficiaries receive the correct award amount.</p>
<p><b>Lesson Objectives</b></p> <ul style="list-style-type: none"> <li>• Process 850 series work items: <ul style="list-style-type: none"> <li>○ Determine which 800 series work item was received.</li> <li>○ Determine the reason for the 850 series work item.</li> <li>○ Determine the appropriate steps to take to process the 850 series work item.</li> <li>○ Perform the required actions to process the 850 series work item.</li> <li>○ Submit the outcomes of the 850 series work item to the Authorizer.</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>5. "Lesson Objectives"</b></p> <p><b>PRESENT</b> the objectives for the lesson.</p>

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PowerPoint Slides	Instructor Activities
<p><b>Knowledge Check</b></p> 	<p><b>DISPLAY</b> slide  <b>6.</b> "Knowledge Check"</p> <p><b>DESCRIBE</b> the diagram.</p> <p><b>INFORM</b> trainees that they will be assessed on this content in Phase 6 Knowledge Check: Process 850 Series Work Items. The knowledge check will be given after this lesson.</p>  <p><b>REFER</b> to the <b>Master Course Map</b> learning aid, <i>Lessons by Phase</i> section, to review the lessons included within the Knowledge Check.</p>
<p><b>800 Series Work Items Review Activity—Part A</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Complete Appendix B: Part A—Match the Title to the Correct Work Series Status Category.</li> <li>○ Given the title description, select the correct status category.</li> <li>○ Use the references listed in Appendix B, Part A.</li> <li>○ Be prepared to share your answers with the class.</li> </ul> </li> <li>• Time allowed: 5–7 minutes</li> </ul>	<p><b>DISPLAY</b> slide  <b>7.</b> "800 Series Work Items Review Activity—Part A"</p> <p><b>DIRECT</b> trainees to:</p> <ul style="list-style-type: none"> <li>• Access Appendix B: Part A—Match the Title to the Correct Work Series Status Category.</li> <li>• Given the title description, select the correct status category.</li> <li>• Use the references listed in Appendix B, Part A.</li> <li>• Be prepared to share your answers with the class.</li> </ul> <p><b>ALLOW</b> 5–7 minutes to complete the activity.</p>

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PowerPoint Slides	Instructor Activities
<p><b>800 Series Work Items Review Activity—Part A Answers</b></p> <ol style="list-style-type: none"><li>1. Explanation of Audit Messages/Notice of Death <i>c. 820 series</i></li><li>2. Bureau of Federal Prison <i>e. 840 series</i></li><li>3. Manual Payment Adjustments <i>d. 850 series</i></li><li>4. Notice of Benefit Payment Transaction <i>c. 810 series</i></li></ol>	<p><b>DISPLAY</b> slide</p> <p><b>8.</b> "800 Series Work Items Review Activity—Part A Answers"</p> <p><b>PROVIDE</b> the answers to the trainees.</p>





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PowerPoint Slides	Instructor Activities
<p><b>800 Series Work Items Review Activity—Part B</b></p> <ul style="list-style-type: none"> <li>• Instructions:               <ul style="list-style-type: none"> <li>○ Divide into pairs.</li> <li>○ Complete Appendix B: Part B—Which Status Category and Claim Label Is It? Worksheet.</li> <li>○ Read the scenarios and identify the status category and claim label for each scenario.</li> <li>○ Confer with your partner and write your answers in the worksheet.</li> <li>○ Use the references listed in Appendix B, Part B.</li> <li>○ Be prepared to share your finished activity with other groups.</li> </ul> </li> <li>• Time allowed: 15 minutes</li> </ul>	<p><b>DISPLAY</b> slide  <b>9.</b> "800 Series Work Items Review Activity—Part B"</p> <p><b>DIVIDE</b> trainees into pairs.</p> <p><b>DIRECT</b> trainees to:</p> <ul style="list-style-type: none"> <li>• Access Appendix B: Part B—Which Status Category and Claim Label Is It? Worksheet.</li> <li>• Read the scenarios.</li> <li>• Identify the work item status category and claim label for each scenario.</li> <li>• Confer with your partner and write your answers in Appendix B, Part B.</li> <li>• Use the references listed in Appendix B, Part B.</li> <li>• Share your finished activity with other groups.</li> </ul> <p><b>ALLOW</b> 15 minutes to complete the activity.</p>
<p><b>800 Series Work Items Review Activity—Part B Answers</b></p> <ul style="list-style-type: none"> <li>• <b>Scenario 1</b> 810 series 603</li> <li>• <b>Scenario 2</b> 820 series 833A</li> <li>• <b>Scenario 3</b> 850 series 850A</li> <li>• <b>Scenario 4</b> 810 series 626</li> <li>• <b>Scenario 5</b> 810 series 631L</li> </ul>	<p><b>DISPLAY</b> slide  <b>10.</b> "800 Series Work Items Review Activity—Part B Answers"</p> <p><b>PROVIDE</b> the answers to the trainees.</p>

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PowerPoint Slides	Instructor Activities
<p><b>Characteristics of Processing 850 Series Work Items</b></p> <ul style="list-style-type: none"> <li>• System-generated notifications requiring a manual payment adjustment</li> <li>• Involve manual adjustment for changes in COLA</li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>11.</b> "Characteristics of Processing 850 Series Work Items"</p>  <p><b>REFER</b> trainees to M21-1 III.v.10.A.1.i (850WI Claim Label) and M21-4 Appendix C, Section I.b (Index of Claim Labels).</p> <p><b>EXPLAIN</b> that 850 series work items:</p> <ul style="list-style-type: none"> <li>• Are system-generated notifications requiring a manual payment adjustment</li> <li>• Involve manual adjustments for changes in COLA</li> </ul> <p><b>REMIND</b> trainees that work items are issued to assist PMCs with identifying and tracking (monitoring) cases that require follow-up action. Coaches run reports to identify 800 series work items. Then the Coaches assign these work items to PMC VSRs for processing.</p> <p><b>REMIND</b> trainees that they learned about processing COLAs earlier in the course.</p>  <p><b>EMPHASIZE</b> the following:</p> <ul style="list-style-type: none"> <li>• According to M21-1 III.v.10.A.3.a (Adjusting an Award to Reflect a COLA), it is not possible to manually clear the 850WI prior to authorization of the award action.</li> <li>• Some apportionment decisions provide for increases in the amount of the apportionment each time the primary beneficiary receives a COLA. Such increases must be processed manually, as well.</li> </ul>

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PowerPoint Slides	Instructor Activities
<p><b>Common Reasons a COLA may not Automatically Generate</b></p> <ul style="list-style-type: none"><li>• Veterans and survivor's pension benefits when the income reported from SSA would cause a decrease to VA benefits</li><li>• DIC benefits when an apportionment is being paid</li><li>• Veterans pension benefits when an apportionment is being paid</li><li>• Any award with a future award line (e.g. dependent is removed from an award on his/her 18th birthday)</li></ul>	<p><b>DISPLAY</b> slide <b>12.</b> "Common Reasons a COLA may not Automatically Generate"</p> <p><b>EXPLAIN</b> that the following are some common reasons a COLA would not automatically generate:</p> <ul style="list-style-type: none"><li>• Veterans and survivor's pension benefits when the income reported from SSA would cause a decrease to VA benefits</li><li>• DIC benefits when an apportionment is being paid</li><li>• Veterans pension benefits when an apportionment is being paid</li><li>• Any award with a future award line (e.g. dependent is removed from an award on his/her 18th birthday)</li></ul> <p></p> <p><b>EMPHASIZE</b> that knowing these reasons can help the PMC VSR determine the reason and actions to take for an 850 series work item.</p> <p></p> <p><b>ASK</b> trainees whether they have any questions about the characteristics of processing 850 series work items or the reasons a COLA may not automatically generate before transitioning to the next slide.</p> <p><b>TELL</b> trainees that the next few slides will explain the 850 series work items claim label in more detail.</p>

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PowerPoint Slides	Instructor Activities
<p><b>850 Series Work Items Claim Label</b></p> <ul style="list-style-type: none"><li>850A: Legislative Rate Adjustment</li></ul> 	<p><b>DISPLAY</b> slide</p> <p><b>13.</b> "850 Series Work Items Claim Label"</p>  <p><b>REFER</b> trainees to M21-1 III.v.10.A.1.i (850WI Claim Label) and M21-4 Appendix C, Section I.b (Index of Claim Labels).</p> <p><b>EXPLAIN</b> that the claim label shown is generated for the 850 status category and will be covered in this lesson.</p>  <p><b>ASK</b> trainees whether they have any questions about the 850 series status category claim label before transitioning to the next slide.</p>

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PowerPoint Slides	Instructor Activities
<p><b>850A: Legislative Rate Adjustment (1 of 3)</b></p> <ul style="list-style-type: none"><li>Reason: this work item generates when a cost of living adjustment (COLA) is not automatically given to a beneficiary.</li><li>Actions:<ul style="list-style-type: none"><li>CEST an EP 696 to control the 850A work item.</li><li>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).</li><li>If the Corporate award shows a 12-01-YYYY line, no further action is necessary.</li></ul></li></ul> 	<p><b>DISPLAY</b> slide</p> <p>14. "850A: Legislative Rate Adjustment (1 of 3)"</p>  <p><b>REFER</b> trainees to the <i>800 Series Work Items Adjustments</i> section of the <b>Processing an Award Adjustment</b> job aid as a resource to follow along with the discussion of the 850 series work items claim label.</p> <p><b>EXPLAIN</b> the reason for the work item claim label and the necessary actions to process it.</p> <p><b>EXPLAIN</b> that the first step is to CEST an EP 696 to control the 850A work item so that the work item will clear automatically once it has been processed.</p>  <p><b>EMPHASIZE</b> that the PMC VSR must confirm a December date in the beneficiary's award that corresponds to the date of the 850A work item.</p>



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PowerPoint Slides	Instructor Activities
<p><b>850A: Legislative Rate Adjustment (2 of 3)</b></p> <ul style="list-style-type: none"> <li>• Actions: <ul style="list-style-type: none"> <li>○ If there is not a 12-01-YYYY line for the current year, further action is needed.</li> <li>○ If there is no additional EP pending, CEST one.</li> <li>○ Determine whether income is being counted.</li> <li>○ 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.</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>15.</b> "850A: Legislative Rate Adjustment (2 of 3)"</p>  <p><b>EMPHASIZE</b> that the PMC VSR must determine whether income is being counted to CEST any additional EPs required to process this work item.</p> <p><b>EXPLAIN</b> while processing an 850A work item, if another income adjustment, medical expense adjustment, or any other issue is claimed, pending, or discovered that warrants action, CEST the appropriate EP, if not already pending, and process it concurrently with the EP 696. If a medical expense adjustment is needed to account for a change in Medicare, CEST an EP 150/157 in addition to the EP 696 and process both concurrently.</p>  <p><b>REMIND</b> trainees that they should NOT make a cost-of-living adjustment under the 850 series work item.</p> <p><b>NOTE:</b> Whether it is an EP 696 or an EP 150/157, the date of claim will be the date of the latest 850 series work item.</p>

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PowerPoint Slides	Instructor Activities
<p><b>850A: Legislative Rate Adjustment (3 of 3)</b></p> <ul style="list-style-type: none"> <li>• Actions:           <ul style="list-style-type: none"> <li>○ 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.</li> <li>○ The final award must be processed under the EP 696 in order to clear the 850A work item.</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>16.</b> “850A: Legislative Rate Adjustment (3 of 3)”</p> <p><b>EXPLAIN</b> that the trainees should clear the EP 150/157 and CEST an EP 607 if the updates/changes to income cause a decrease in benefits that requires applying due process provisions.</p> <p><b>REMIND</b> trainees that the final award must still also be processed under the EP 696 in order to clear the 850A work item.</p> <p><b>EXPLAIN</b> that for DIC cases where an apportionment is being paid, two EPs are required.</p> <ul style="list-style-type: none"> <li>• CEST an EP 696 for the (payee 10) surviving spouse award</li> <li>• CEST an EP 137 Apportionment for all apportionees requiring a COLA. Apportionments do not adjust automatically.</li> </ul> <p><b>NOTE:</b> You consider COLA for DIC apportionments but not for pension apportionments because the beneficiaries must apply for an increase to a pension apportionment. See M21-1 III.v.3.B.1.k (Handling Allegations of Hardship When an Apportionment Is Already in Place).</p> <p align="center"></p> <p><b>ASK</b> trainees whether they have any questions about the 850A series work item claim label before transitioning to the next slide.</p> <p><b>TELL</b> trainees that the next part of the lesson will present a demonstration of an 850 series work item followed by a guided practice exercise.</p>



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PowerPoint Slides	Instructor Activities
<p><b>COLA and Effective Dates</b></p> <ul style="list-style-type: none"> <li>• If COLA creates a decrease to an award in December, “protect the rate” by deferring the adjustment until January.</li> <li>• If medical expenses will cause an increase, apply Omnibus also and defer the adjustment until February instead of January.</li> </ul>	<p><b>DISPLAY</b> slide  <b>17. “COLA and Effective Dates”</b></p> <p><b>EXPLAIN</b> that if the COLA creates a decrease to an award in December, “protect the rate” by deferring the adjustment to January. If medical expenses will cause an increase the following year, apply Omnibus also and defer the adjustment until February instead of January.</p>  <p><b>REFER</b> trainees to the following manual references to discuss the factors that affect determining effective dates for COLA.</p> <ul style="list-style-type: none"> <li>• M21-1 V.iii.1.A.5.I (Example 1: Handling a MAPR and Income Change Effective the Same Date)</li> <li>• M21-1 V.iii.1.H.2.c (Reduction in Rate of Current-Law Pension Due to SS’s COLA)</li> </ul> <p><b>DISCUSS</b> the examples in both references.</p>  <p><b>ASK</b> trainees whether they have any questions about effective dates with COLA or the 850A series work item claim label before transitioning to the next part of the lesson.</p> <p><b>TELL</b> trainees that the next part of the lesson will present a demonstration of an 850 series work item followed by a guided practice exercise.</p>





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### Lesson Plan

PowerPoint Slides	Instructor Activities
<p><b>Demonstration and Guided Practice</b></p> <ul style="list-style-type: none"> <li>• <b>Demonstration</b>—Instructor processes a work item from start to finish with opportunities for questions.</li> <li>• <b>Guided Practice</b>—Trainees process a claim with questions and feedback/remediation.</li> </ul>	<p><b>DISPLAY</b> slide  <b>18.</b> "Demonstration and Guided Practice"</p> <p><b>TELL</b> trainees the remainder of the lesson presents instructor demonstrations and a guided practice exercise.</p> <p><b>EXPLAIN</b> that the purpose of <b>Demonstration</b> strategy is to provide trainees 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> <p><b>EXPLAIN</b> that the purpose of the <b>Guided Practice</b> strategy is to allow trainees to perform the steps using job aids and other references as needed. They may ask questions about the process to increase their understanding. Feedback and remediation is provided as they proceed through the process.</p>
<p><b>Demonstration Work Item—850 Series Work Items</b></p>  <ul style="list-style-type: none"> <li>• Demonstration— <ul style="list-style-type: none"> <li>○ {Work item}</li> <li>○ {Other information}</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>19.</b> "Demonstration Work Item—850 Series Work Items"</p>  <p><b>REMINDER:</b> Populate this slide with demographic information about demonstration work item.</p> <p><b>INTRODUCE</b> the demonstration work item.</p> <p><b>SELECT</b> one of the trainees to read the work item information on the slide.</p> <p><b>REMIND</b> trainees that you will demonstrate how to process an 850 series work item from start to finish. Trainees should write their questions down and ask at the conclusion of the demonstration.</p>






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PowerPoint Slides	Instructor Activities
	 <p><b>REFER</b> trainees to the <b>Processing an Award Adjustment</b> job aid as resource for steps to take to process an 850 series work item.</p>  <p><b>EXPLANATION OF DEMONSTRATION FOR INSTRUCTOR:</b></p> <ul style="list-style-type: none"><li>• It is important for you, as the instructor, to “think out loud” so that the trainees understand your thought processes.</li><li>• It is vital that you follow the steps and instructions taught in the job aids and previous lessons to ensure continuity and prevent confusion. <b>You must be familiar with the related lessons from Phases 4, 5, and 6, as specified in Lesson 17: Appendix A.</b></li><li>• 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 800 series work items.</li><li>• For example, as an experienced PMC VSR, you may recognize the 850A claim labels easily and already know the likely solution to resolve it; but it is important to point out to the trainees that you <b>did</b>, first, determine which claim label was received before you determined the reason for the claim label, determined the steps to take, and then performed the necessary actions to process the work item.</li></ul>



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PowerPoint Slides	Instructor Activities
<p data-bbox="155 296 626 407"><b>Demonstration Work Item— Determine Which 800 Series Work Item Was Received</b></p> 	<p data-bbox="701 296 1446 407"><b>DISPLAY</b> slide 20. "Demonstration Work Item—Determine Which 800 Series Work Item Was Received"</p> <p data-bbox="701 432 1349 506"><b>EXPLAIN</b> that a Coach usually will assign a particular work item to the PMC VSR.</p> <p data-bbox="701 531 1458 604"><b>SHOW</b> trainees in the system where the work item messages appear.</p>  <p data-bbox="701 749 1458 823"><b>REFER</b> to the <b>Processing an Award Adjustment</b> job aid as needed.</p>  <p data-bbox="701 968 1446 1079"><b>DEMONSTRATE</b>, using the example work item, how a PMC VSR would determine which 800 series work item was received.</p>  <p data-bbox="701 1224 1370 1335"><b>ASK</b> if trainees have any questions about the determining with 800 series work item was received.</p>




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PowerPoint Slides	Instructor Activities
<p><b>Demonstration Work Item—Determine the Reason for the 850 Series Work Item</b></p> <ul style="list-style-type: none"> <li>• Work item was not cleared previously, but no update is needed</li> <li>• An update is needed in the system</li> <li>• An award adjustment is needed</li> </ul> 	<p><b>DISPLAY</b> slide  <b>21.</b> “Demonstration Work Item—Determine the Reason for the 850 Series Work Item”</p> <p><b>REMINDE</b> trainees of the possible reasons for 800 series work items:</p> <ul style="list-style-type: none"> <li>• Work item was not cleared previously, but no update is needed</li> <li>• An update is needed in the system</li> <li>• An award adjustment is needed</li> </ul>  <p><b>DEMONSTRATE</b>, using example work item, how a PMC VSR would determine the reason for the work item.</p>  <p><b>ASK</b> if they have any questions about determining the reason for the 850 series work item for the demonstration work item example.</p>
<p><b>Demonstration Work Item—Determine the Appropriate Steps to Take to Process the 850 Series Work Item</b></p> 	<p><b>DISPLAY</b> slide  <b>22.</b> “Demonstration Work Item—Determine the Appropriate Steps to Take to Process the 850 Series Work Item”</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p> <p><b>NOTE</b> previous lessons provided training on parts or all of this step. <i>Lesson 17: 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>






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	<p>remind them of these processes and provide continuity of instruction for the trainees:</p> <ul style="list-style-type: none"><li>• Establish a claim (CEST)</li><li>• Establish periods for calculating income</li><li>• Determine the types of income for pension purposes</li><li>• Select qualifying expenses for calculating income</li><li>• Determine income status</li><li>• Describe how to prepare an award action</li><li>• Create decision notice</li><li>• Determine qualifying expense adjustments</li><li>• Determine an award adjustment based on amended income</li><li>• Apply due process provisions to a claim</li><li>• Process a claim for Dependency and Indemnity Compensation (DIC)</li><li>• Process income and net worth adjustment claims</li><li>• Process expense adjustment claims</li><li>• Process apportionment claims</li></ul> <p> <b>DEMONSTRATE</b>, using the example work item, how a PMC VSR would determine the appropriate steps to take to process the 850 series work item.</p> <p> <b>ASK</b> if they have any questions about determining the appropriate steps to take to process the 850 series work item.</p>



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PowerPoint Slides	Instructor Activities
<p><b>Demonstration Work Item— Perform the Required Actions to Process the 850 Series Work Item</b></p> 	<p><b>DISPLAY</b> slide  <b>23.</b> “Demonstration Work Item— Perform the Required Actions to Process the 850 Series Work Item”</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p> <p><b>NOTE</b> previous lessons provided training on parts or all of this step. <i>Lesson 17: 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"> <li>• Establish a claim (CEST)</li> <li>• Establish periods for calculating income</li> <li>• Determine income status</li> <li>• Describe how to prepare an award action</li> <li>• Create decision notice</li> <li>• Determine an award adjustment based on amended income</li> <li>• Process a claim for Dependency and Indemnity Compensation (DIC)</li> <li>• Process expense adjustment claims</li> <li>• Process apportionment claims</li> </ul>  <p><b>DEMONSTRATE</b>, using the example work item, how a PMC VSR would perform the required actions to process the 850 series work item.</p> <p><b>REMINDE</b> trainees that one of the required actions</p>

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PowerPoint Slides	Instructor Activities
	<p>to process 850 series work items may be creating and sending a decision notice.</p>  <p><b>EMPHASIZE</b> the following for the demonstration work item example, as needed:</p> <ul style="list-style-type: none"> <li>• Which paragraphs to include and why</li> <li>• Which template to choose</li> <li>• Which autotext to include and how to insert it</li> </ul> <p><b>REMINDE</b> trainees that the PMC VSR must also include the necessary financial information (what the VBA is counting or not counting as income) for the determination in the decision notice for certain types of award adjustments, as well annotating the calculations for submission to the Authorizer.</p>  <p><b>ASK</b> if they have any questions about performing the required actions to process the 850 series work items.</p>
<p><b>Demonstration Work Item—Submit the Outcomes of the 850 Series Work Item to the Authorizer</b></p> 	<p><b>DISPLAY</b> slide  <b>24.</b> “Demonstration Work Item—Submit the Outcomes of the 850 Series Work Item to the Authorizer”</p>  <p><b>DEMONSTRATE</b>, using the example work item, how a PMC VSR would submit the outcomes of the 850 series work item to the Authorizer according to local procedures.</p> 

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	<p><b>ASK</b> if they have any questions about submitting the outcomes of the 850 series work item to the Authorizer.</p> <p></p> <p><b>EXPLAIN</b> that after trainees have processed the work item, they will take credit for their work in ASPEN based on local policy. Team leaders will advise the PMC VSRs of local policy when they begin processing work items at their station.</p> <p><b>SHOW</b> ASPEN and how to take credit. Do not tell them how much credit to take for any specific action. A Coach will provide further guidance about local procedures.</p> <p></p> <p><b>ASK</b> if they have any questions about taking credit in ASPEN.</p> <p><b>ASK</b> if there are any final questions about the demonstration or anything covered in this lesson before transitioning to the Guided Practice Exercise.</p>





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PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise Overview—850 Series Work Items (1 of 2)</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Process 850 series work item from beginning to end.</li> <li>○ Use the job aids, references, and systems available.</li> <li>○ Select a partner before beginning the exercise to confer with after completing each step individually.</li> <li>○ Consult with instructors for assistance.</li> <li>○ Be prepared to discuss your results with the class.</li> <li>○ Take credit in ASPEN as directed at the completion of the exercise.</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>25.</b> “Guided Practice Exercise Overview—850 Series Work Items (1 of 2)”</p> <p><b>EXPLAIN</b> that in this portion of the lesson, trainees will process an 850 series work item from start to finish.</p> <p><b>DIRECT</b> trainees to select a partner to work with during this exercise:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Trainees should be prepared to share their results with the class.</li> </ul> <p><b>ENCOURAGE</b> trainees to consult with the instructors if they need assistance.</p> <p><b>REMIND</b> instructors to provide direction, but not the outcomes.</p> <p align="center"></p> <p><b>NOTE:</b> Recall that you will need additional instructors to achieve a 1:4 instructor/trainee ratio during this portion of the lesson.</p> <p align="center"></p> <p><b>REFER</b> to <i>Lesson 17: Appendix A</i> for references and job aids from previous lessons.</p> <p><b>ENCOURAGE</b> 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>


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PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise Overview—850 Series Work Items (2 of 2)</b></p> <ul style="list-style-type: none"> <li>• This exercise includes the following parts of the work items process: <ul style="list-style-type: none"> <li>○ Determine which 800 series work item was received.</li> <li>○ Determine the reason for the 850 series work item.</li> <li>○ Determine the appropriate steps to take to process the 850 series work item.</li> <li>○ Perform the required actions to process the 850 series work item.</li> <li>○ Submit the outcomes of the 850 series work item to the Authorizer.</li> </ul> </li> </ul>	<p><b>DISPLAY</b> slide  <b>26.</b> "Guided Practice Exercise Overview—850 Series Work Items (2 of 2)"</p> <p><b>TELL</b> trainees that they will now be working through the same steps to process an 850 series work item as they viewed in the demonstration, but using a different work item example.</p>
<p><b>Guided Practice Exercise—850 Series Work Items</b></p> <p>Guided Practice Exercise Example:</p> <ul style="list-style-type: none"> <li>• {Work item}</li> <li>• {Other information}</li> </ul>	<p><b>DISPLAY</b> slide  <b>27.</b> "Guided Practice Exercise Example—850 Series Work Items"</p> <p><b>INTRODUCE</b> the Guided Practice Exercise Work Item Example.</p> <p><b>SELECT</b> a trainee to read the example information on the slide.</p>


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PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise—Determine Which 800 Series Work Item Was Received</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Determine which 800 series work item was received.</li> <li>○ Confer with your partner.</li> <li>○ Be prepared to discuss your results with the class.</li> </ul> </li> <li>• Time allowed: 5 minutes</li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>28.</b> "Guided Practice Exercise—Determine Which 800 Series Work Item Was Received"</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p> <p><b>DIRECT</b> trainees to the Guided Practice Exercise Example.</p> <p><b>DIRECT</b> trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.</p> <p><b>ASSIST</b> 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 steps.</p>  <p><b>ASK</b> if trainees have any questions about the determining which 800 series work item was received.</p> <p><b>DISCUSS</b> answers to the trainees' questions.</p>


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PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise— Determine the Reason for the 850 Series Work Item</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Determine the reason for the work item.</li> <li>○ Confer with your partner.</li> <li>○ Be prepared to discuss your results with the class.</li> </ul> </li> <li>• Time allowed: 15 minutes</li> </ul>	<p><b>DISPLAY</b> slide  <b>29.</b> "Guided Practice Exercise—Determine the Reason for the 850 Series Work Item"</p> <p><b>DIRECT</b> trainees to Guided Practice Exercise Example.</p> <p><b>DIRECT</b> trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.</p> <p><b>ASSIST</b> 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 steps.</p> <p align="center"></p> <p><b>ASK</b> why it is important to determine the reason for the work item.</p> <p><b>ASK</b> if trainees have any questions about the reason for the Exercise Example work item.</p> <p><b>PROVIDE</b> feedback and remediation as necessary.</p>


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PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise—Determine the Appropriate Steps to Take to Process the 850 Series Work Item</b></p> <ul style="list-style-type: none"> <li>• Instructions:           <ul style="list-style-type: none"> <li>○ Determine the steps to take to process the 850 series work item.</li> <li>○ Use the job aids, references, and systems available.</li> <li>○ Confer with your partner.</li> <li>○ Be prepared to discuss your results with the class.</li> </ul> </li> <li>• Time allowed: 15 minutes</li> </ul>	<p><b>DISPLAY</b> slide  <b>30.</b> “Guided Practice Exercise—Determine the Appropriate Steps to Take to Process the 850 Series Work Item”</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p> <p><b>NOTE</b> previous lessons provided training on parts or all of this step. <i>Lesson 17: 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"> <li>• Establish a claim (CEST)</li> <li>• Establish periods for calculating income</li> <li>• Determine the types of income for pension purposes</li> <li>• Select qualifying expenses for calculating income</li> <li>• Determine income status</li> <li>• Describe how to prepare an award action</li> <li>• Create decision notice</li> <li>• Determine qualifying expense adjustments</li> <li>• Determine an award adjustment based on amended income</li> <li>• Process income and net worth adjustment claims</li> <li>• Process expense adjustment claims</li> </ul> <p><b>DIRECT</b> trainees to the Guided Practice Exercise Example.</p>


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	<p><b>DIRECT</b> trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.</p> <p><b>ASSIST</b> 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 steps.</p> <p><b>SELECT</b> a trainee to share the steps they have determined to take to process the Exercise Example work item.</p> <p></p> <p><b>ASK</b> if trainees have any questions about the determining the appropriate steps to take to process the 850 series work item.</p> <p><b>DISCUSS</b> answers to the trainees' questions.</p>

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<p><b>Guided Practice Exercise—Perform the Required Actions to Process the 850 Series Work Item</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Perform the required actions to process the specific claim label for the 850 series work item.</li> <li>○ Use the job aids, references, and systems available.</li> <li>○ Confer with your partner to asses each other’s steps to process the work item.</li> <li>○ Ask for guidance from the instructor if you identify discrepancies.</li> </ul> </li> <li>• Time allowed: 40 minutes</li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>31.</b> “Guided Practice Exercise—Perform the Required Actions to Process the 850 Series Work Item”</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p> <p><b>NOTE</b> previous lessons provided training on parts or all of this step. <i>Lesson 17: 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"> <li>• Establish a claim (CEST)</li> <li>• Establish periods for calculating income</li> <li>• Select qualifying expenses for calculating income</li> <li>• Determine income status</li> <li>• Describe how to prepare an award action</li> <li>• Create decision notice</li> <li>• Determine qualifying expense adjustments</li> <li>• Determine an award adjustment based on amended income</li> <li>• Process income and net worth adjustment claims</li> <li>• Process expense adjustment claims</li> </ul> <p><b>DIRECT</b> trainees to the Guided Practice Exercise Example.</p> <p><b>DIRECT</b> trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers</p>






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	<p>with the class.</p> <p><b>ASSIST</b> 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 steps.</p> <p><b>SELECT</b> a trainee to share the steps they have performed to process the exercise example work item.</p> <p><b>ASSIST</b> trainees as necessary with creating a decision notice if required:</p> <ul style="list-style-type: none"><li>• Financial information</li><li>• Which paragraphs to include and why</li><li>• Which template to choose</li><li>• Which autotext to include and how to insert it</li></ul> <p><b>PROVIDE</b> feedback and remediation as needed.</p> <p></p> <p><b>ASK</b> if trainees have any questions about the performing the required actions to process the 850 series work item.</p> <p><b>DISCUSS</b> answers to the trainees' questions.</p>



## Lesson 17: Process 850 Series Work Items (Manual Payment Adjustments)

### Lesson Plan

PowerPoint Slides	Instructor Activities
<p><b>Guided Practice Exercise—Submit the Outcomes of the 850 Series Work Item to the Authorizer</b></p> <ul style="list-style-type: none"> <li>• Instructions: <ul style="list-style-type: none"> <li>○ Finalize notes for work items and save completed work in appropriate locations for review by Authorizer.</li> <li>○ Use the job aids, references, and systems available.</li> </ul> </li> <li>• Time allowed: 10 minutes</li> </ul>	<p><b>DISPLAY</b> slide  <b>32.</b> “Guided Practice Exercise—Submit the Outcomes of the 850 Series Work Item to the Authorizer”</p>  <p><b>REFER</b> to the steps provided in the <b>Processing an Award Adjustment</b> job aid.</p>  <p><b>ASK</b> if they have any questions about submitting the outcomes of the work item to the Authorizer.</p>  <p><b>REMIND</b> trainees at the conclusion of the exercise to take credit in ASPEN based on their local policy.</p>
<p><b>Questions?</b></p> 	<p><b>DISPLAY</b> slide  <b>33.</b> “Questions?”</p>  <p><b>ASK</b> if there are any final questions about the Guided Practice Exercise or anything covered in this lesson.</p>
<p><b>Lesson Summary (1 of 2)</b></p> <p>What are the main tasks a PMC VSR must accomplish to process 850 series work items?</p>	<p><b>DISPLAY</b> slide  <b>34.</b> “Lesson Summary (1 of 2)”</p> <p><b>REVIEW</b> the main objective of this lesson: to process 850 series work items.</p> <p><b>REVIEW</b> the key points of the lesson by asking the trainees to answer the following question:</p> <ul style="list-style-type: none"> <li>• What are the main tasks a PMC VSR must accomplish to process 850 series work items?</li> </ul>

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### Lesson Plan

PowerPoint Slides	Instructor Activities
<p><b>Lesson Summary (2 of 2)</b></p> <p>What are the main tasks a PMC VSR must accomplish to process 850 series work items?</p> <ul style="list-style-type: none"> <li>• <i>Determine which 800 series work item was received.</i></li> <li>• <i>Determine the reason for the 850 series work item.</i></li> <li>• <i>Determine the appropriate steps to take to process the 850 series work item.</i></li> <li>• <i>Perform the required actions to process the 850 series work item.</i></li> <li>• <i>Submit the outcomes of the 850 series work item to the Authorizer.</i></li> </ul>	<p><b>DISPLAY</b> slide</p> <p><b>35.</b> "Lesson Summary (2 of 2)"</p> <p><b>PROVIDE</b> the following answers as listed on the slide:</p> <p>What are the main tasks a PMC VSR must accomplish to process 850 series work items?</p> <ul style="list-style-type: none"> <li>• <i>Determine which 800 series work item was received.</i></li> <li>• <i>Determine the reason for the 850 series work item.</i></li> <li>• <i>Determine the appropriate steps to take to process the 850 series work item.</i></li> <li>• <i>Perform the required actions to process the 850 series work item.</i></li> <li>• <i>Submit the outcomes of the 850 series work item to the Authorizer.</i></li> </ul>
<p><b>What's Next?</b></p> <p>Knowledge Check: Process 850 Series Work Items</p>	<p><b>DISPLAY</b> slide</p> <p><b>36.</b> "What's Next?"</p> <p><b>EXPLAIN</b> the upcoming Knowledge Check: Process 850 Series Work Items.</p>