Pension and fiduciary service

PMC VSR Advanced Core Course

Phase 5: Stages of a Claim
 Part 1: Determine Eligibility

Lesson 3: End Product (EP) Codes

Appendix A

June 2022

Group Activity: Practice Exercise Worksheet

Read the following scenarios and answer the questions that follow.

**Scenario 1:** On February 8, 2020, VA received a VA Form 21-4138 (Statement in Support of Claim) and a Social Security benefit statement signed by the beneficiary Frank Rogers indicating he began receiving Social Security benefits in the amount of $1,250.00 per month. An EP 150 was entered into the system.

* Is the EP code correct?
* What is the rationale for your decision?

**Scenario 2:** VA received a VA Form 21P-601 (Application for Accrued Amounts Due a Deceased Beneficiary) on March 3, 2020, signed by claimant Angela Roberts. Mrs. Roberts is the surviving spouse of Anthony Roberts, who is a deceased Veteran previously in receipt of VA compensation benefits. An EP 140 has been established in the system.

* Is the EP code correct?
* What is the rationale for your decision?

**Scenario 3:** VA received a completed VA Form 21-674 (Request for Approval of School Attendance), on January 15, 2020, signed by Survivors Pension beneficiary Joan Smith. Mrs. Smith wants to continue her school aged child, Jeffrey, as a dependent on her award. An EP 150 is established in the system.

* Is the EP code correct?
* What is the rationale for your decision?

**Scenario 4:** VA received a fully completed VA Form 21P-530, Application for Burial Benefits, on March 4, 2020 signed by the surviving spouse of Walter Mason, Megan Mason. Mrs. Mason is claiming the burial expenses of Mr. Mason who passed away on February 2, 2020. An EP 160 was entered into the system.

* Is the EP code correct?
* What is the rationale for your decision?