



PENSION AND FIDUCIARY SERVICE

PMC VSR Core Course
Phase 5: Stages of a Claim
Part 5: Award Adjustments

Lesson 1: Determine Qualifying Expense Adjustments

Trainee Guide

March 24, 2017

Version 1.0

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Trainee Guide

Determine Qualifying Expense Adjustments

Lesson Overview

Topic	Description
Time Estimate:	4 hours
Purpose of the Lesson:	This lesson is part of the entry-level curriculum, Core Course for PMC VSRs. The purpose of this lesson is to prepare you to recognize and accurately calculate award adjustments for unreimbursed medical, final, and educational expenses.
Prerequisite Training Requirements:	Prior to taking the Determine Qualifying Expense Adjustments lesson, you must complete PMC VSR Core Course Phases 1–4, Phase 5 Parts 1-4. (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 • Compensation and Pension Knowledge Management (CPKM) • VA Form 21-8049 (Request for Detail of Expenses) • VA Form 21P-8416 (Medical Expense Report) • M21-1 V.i.3.D.2 (Developing for Unreimbursed Medical Expenses) • M21-1 V.i.3.D.3 (Developing for Unreimbursed Funeral and Other Final Expenses) • M21-1 V.i.3.D.4 (Developing for Unreimbursed Educational Expenses) • M21-1 V.iii.1.A.3.g (Definition of Initial Year for Pension and Time Limit for Establishing Entitlement for the Initial Year) • M21-1 V.iii.1.A.5.b. (Provisions of 38 CFR 3.31) • M21-1 V.iii.1.A.5.c. (History of 38 CFR 3.31) • M21-1 V.iii.1.A.5.d. (Determining Whether to Apply 38 CFR 3.31) • M21-1 V.iii.1.A.5.i. (Example 2: Re-computing Awards Based on New Income Information)

**Lesson 1: Determine Qualifying Expense Adjustments
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Topic	Description
	<ul style="list-style-type: none"> • M21-1 V.iii.1.E.7.b (Deductible Medical Expenses Paid During the Initial Year) • M21-1 V.iii.1.G.2 (Unreimbursed Medical Expense (UME) Deductions) <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.2.a. (Rules for Deductibility of UMEs) ○ M21-1 V.iii.1.G.2.c. (List of Common Allowable Medical Expenses) • M21-1 V.iii.1.G.3 (Sources of Medical Expenses) <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.3.j. (Medical Expense Deduction for Nursing Home Fees) ○ M21-1 V.iii.1.G.3.l. (Medical Expense Deduction for ALF Fees) ○ M21-1 V.iii.1.G.3.p. (In-Home Attendants for a Disabled Person Not in Need of A&A or Housebound) ○ M21-1 V.iii.1.G.3.q. (Documentation of In-Home Attendant Fees) ○ M21-1 V.iii.1.G.3.t. (Medicare Premiums) ○ M21-1 V.iii.1.G.3.u. (Nonprescription Drugs, Medical Supplies, Vitamins, Food Supplements, and Herbal remedies) • M21-1 V.iii.1.G.4 (Processing UME Deductions) • M21-1 V.iii.1.G.4.a. (General Rule on Allowing Medical Expenses) • M21-1 V.iii.1.G.4.b. (Information Required for a Medical Expense Deduction Claim) • M21-1 V.iii.1.G.6. (Final Expense Deductions – Overview and Definitions) • M21-1 V.iii.1.G.7.c. (Example 2: General Rule for Deducting Final Expenses) • M21-1 V.iii.1.G.7.d. (Example 3: Final Expenses Paid During the Calendar Year Following the Year of Death) • M21-1 V.iii.1.G.7.e. (Example 4: Final Expenses Paid by the Surviving Spouse Before the Veteran’s Death)

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Topic	Description
	<ul style="list-style-type: none"> • M21-1 V.iii.1.G.7.f. (Example 5: Final Expenses Paid by the Surviving Spouse After the Veteran’s Death but Before the Date of Pension Entitlement) • M21-1 V.iii.1.G.7.g. (Example 6: Final Expenses Paid by the Surviving Spouse Before the Veteran’s Death and During the Calendar Year Following the Year of Death) • M21-1 V.iii.1.G.8 (Educational Expense Deductions) • M21-1 V.iii.1.G.8.c. (Period of Deduction) • 38 CFR 3.262.p. (Final expenses) • Annotate the Award Checklist job aid • Care Expense Guide job aid • Develop for Missing Information/Evidence job aid • Income and Net Worth Status job aid • Initial Year job aid • Integration of Medical Expenses in VBMS-A job aid • Processing an Award Adjustment job aid • Time Limits job aid
Technical Competencies:	<ul style="list-style-type: none"> • Processing Claims (PMC VSR) • Income Counting and Net Worth • Special Monthly Pension (SMP) Processing • VBA Applications (PMC VSR)
Knowledge Check:	Phase 5: Stages of Claim, Part 5a Award Adjustments Knowledge Check
Lesson Objectives:	<p>Determine qualifying expense adjustments.</p> <ul style="list-style-type: none"> • Determine whether medical expense qualifies for an award adjustment. • Determine whether final expense qualifies for an award adjustment. • Determine whether educational expense qualifies for an award adjustment.

Lesson 1: Determine Qualifying Expense Adjustments Trainee Guide

Topic	Description
What You Need:	<ul style="list-style-type: none"> • Trainee Guide • Master Course Map learning aid • Slides • Projector • Access to CPKM • Access to VBMS-A academic mode • Access to VSR Assistant for job aids: <ul style="list-style-type: none"> ○ Processing Award Adjustments job aid ○ Care Expense Guide job aid ○ Income and Net Worth Status job aid ○ Initial Year job aid ○ Integration of Medical Expenses in VBMS-A job aid ○ Time Limits job aid

PowerPoint Slides	Notes
<p>Lesson 1: Determine Qualifying Expense Adjustments</p>	
<p>You Are Here</p> <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] P5 --> P5P1[PHASE 5 PART 1 Determine Eligibility] P5P1 --> P5P2[PHASE 5 PART 2 Process a Claim] P5P2 --> P5P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P5P3 --> P5P4[PHASE 5 PART 4 Prepare Decision Notice] P5P4 --> P5P5[PHASE 5 PART 5 Award Adjustments] style P5 stroke:#0070c0,stroke-width:2px style P5P1 stroke:#0070c0,stroke-width:2px style P5P2 stroke:#0070c0,stroke-width:2px style P5P3 stroke:#0070c0,stroke-width:2px style P5P4 stroke:#0070c0,stroke-width:2px style P5P5 stroke:#0070c0,stroke-width:2px </pre>	







**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Why It Matters!</p> <p>Scenario:</p> <p>Andrew Roberts is a Veteran that has been in receipt of NSC pension since July 2012. His only source of continuing medical expenses are his Medicare Part B Premiums, which is reported on a 2016 SHARE print as \$104.90 monthly. On January 18, 2017 he submits a completed VA Form 21-8416, Medical Expense Report, for his 2016 annual unreimbursed medical expenses. He reports his monthly Medicare Part B premium of \$104.90, co-pays to his doctor of \$125.00 annually, prescriptions of \$650.00 annually, and over-the-counter medications of \$225.00 annually. You perform a SSA inquiry in 2017 verifying his updated Medicare Part B Premium for 2017 has increased to \$106.00 per month.</p>	
<p>Why It Matters Answers</p>	
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Processing Claims (PMC VSR) • Income Counting and Net Worth (PMC VSR) • Special Monthly Pension (SMP) Processing • VBA Applications (PMC VSR) 	

Lesson 1: Determine Qualifying Expense Adjustments Trainee Guide

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<p>Knowledge Check</p> <pre> graph TD P1[PHASE 5 PART 1 Determine Eligibility] --> P2[PHASE 5 PART 2 Process a Claim] P2 --> P3[PHASE 5 PART 3 Promulgate Non-Rating or Rating Decision] P3 --> P4[PHASE 5 PART 4 Prepare Decision Notice] P4 --> P5[PHASE 5 PART 5 Award Adjustments] P2 --- K2{Phase 5 Part 2 Knowledge Check} P3 --- K3{Phase 5 Part 3 Knowledge Check} P4 --- K4{Phase 5 Part 4 Knowledge Check} P5 --- K5a{Phase 5 Part 5a Knowledge Check} P5 --- K5b{Phase 5 Part 5b Knowledge Check} style K5a stroke:#0000FF,stroke-width:2px </pre>	

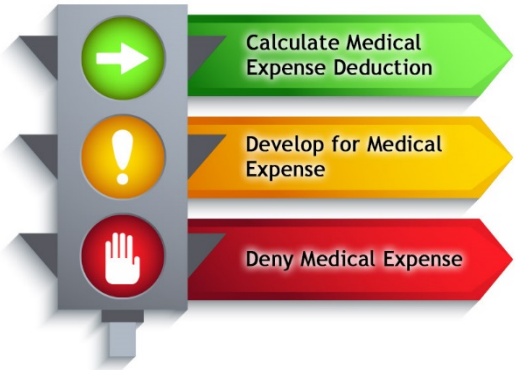
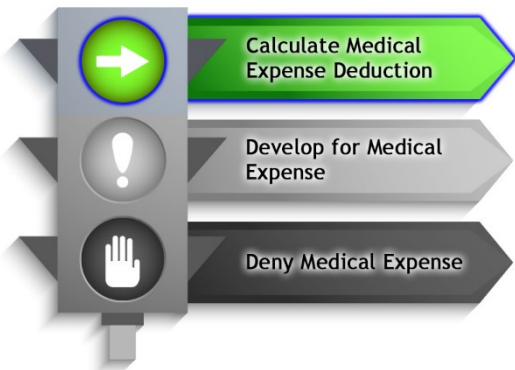
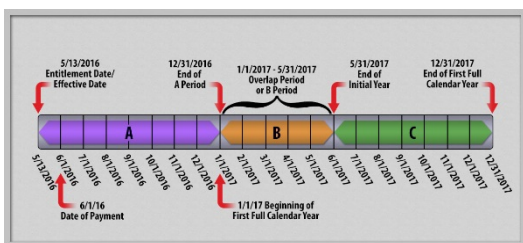
**Lesson 1: Determine Qualifying Expense Adjustments
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PowerPoint Slides	Notes
<p>Award Adjustments</p> <p>Award Adjustments:</p> <ul style="list-style-type: none"> • Determine Qualifying Expense Adjustments • Determine Amended Income Adjustments • Determine Net Worth Adjustments • Determine Dependency Adjustments 	
<p>Qualifying Expense Adjustments</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>Medical Expense Adjustments</p> </div> <div style="text-align: center;">  <p>Final Expense Adjustments</p> </div> <div style="text-align: center;">  <p>Educational Expense Adjustments</p> </div> </div>	
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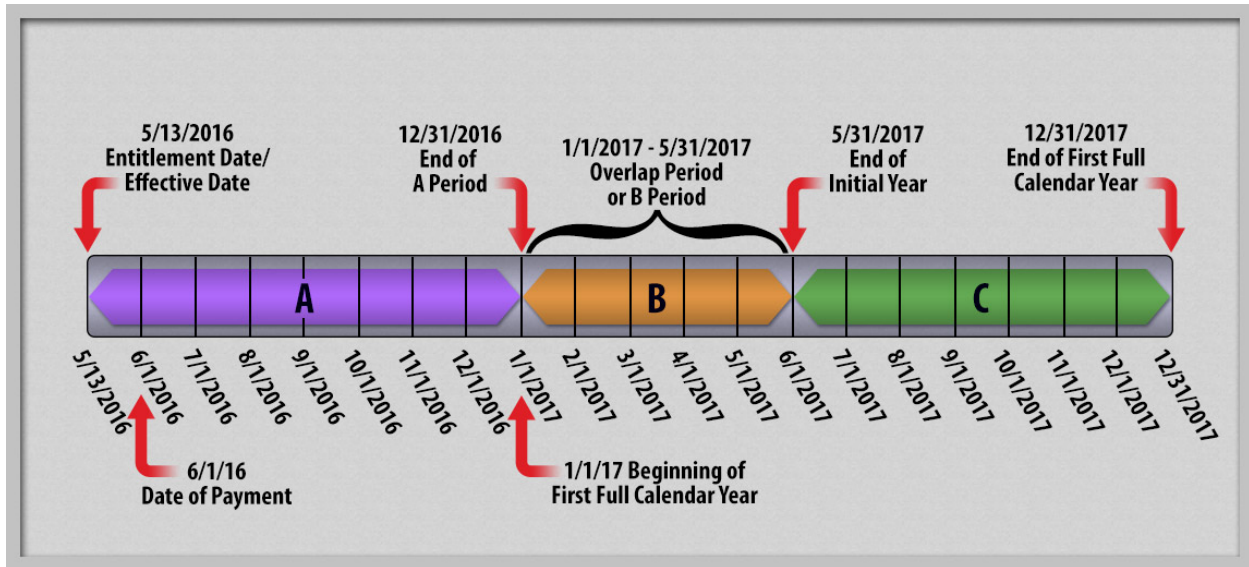
**Lesson 1: Determine Qualifying Expense Adjustments
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PowerPoint Slides	Notes
<p>Review Medical Expenses (1 of 2)</p> <p>Qualifying medical expenses:</p> <ul style="list-style-type: none"> • M21-1 V.iii.1.G.2.a (Rules for Deductibility of UMEs) • M21-1 V.iii.1.G.2.c (List of Common Allowable Medical Expenses) • M21-1 V.iii.1.G.3 (Sources of Medical Expenses) 	
<p>Review Medical Expenses (2 of 2)</p> <ul style="list-style-type: none"> • Allowing medical expense deduction: <ul style="list-style-type: none"> ○ M21-1V.iii.1.G.4.a. (General Rule on Allowing Medical Expenses) • Information required for medical expenses <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.4.b. (Information Required for a Medical Expense Deduction Claim) 	
<p>Review Medical Expenses Answers</p>	

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PowerPoint Slides	Notes
<p>Determine Qualifying Medical Expense Adjustment</p> 	
<p>Calculate the Medical Expense</p> 	
<p>Determine if Medical Expense is Within Initial Year or Calendar Year</p> 	

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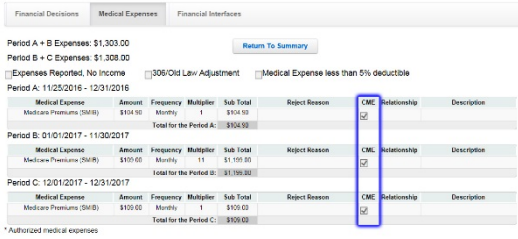


PowerPoint Slides	Notes
<p>Class Activity—Review Initial Year</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Access Claim 1 used in the first practice exercise. ○ Use Appendix A: Part A—Review Initial Year worksheet. ○ Refer to Initial Year job aid. ○ Work as a class to find the correct dates based on the Claim 1. • Time allowed: 25 minutes 	
<p>Class Activity—Review Initial Year Answers</p>	
<p>Initial Year in VBMS-A Demo</p> 	

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<p>Compare Medical Expenses</p> <p>Period A + B Expenses: \$42,103.00 Period B + C Expenses: \$42,108.00</p> <p style="text-align: right;"> Return To Worksheet Accept </p> <p> <input type="checkbox"/> Expenses Reported, No Income <input type="checkbox"/> 306/Old Law Adjustment <input type="checkbox"/> Medical Expense less than 5% deductible </p> <p>Period A: 11/05/2016 - 12/31/2016</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Medical Expense</th> <th>Amount</th> <th>Frequency</th> <th>Multiplier</th> <th>Sub Total</th> <th>Reject Reason</th> <th>CME</th> <th>Relationship</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Medicare Premiums (SMIB)</td> <td>\$104.90</td> <td>Monthly</td> <td>1</td> <td>\$104.90</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>Nursing Home Fees</td> <td>\$3,200.00</td> <td>Monthly</td> <td>1</td> <td>\$3,200.00</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>Clearbrook Nursing Home</td> </tr> <tr> <td>Private Medical Insurance Premiums</td> <td>\$200.00</td> <td>Monthly</td> <td>1</td> <td>\$200.00</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>Prescription Medications</td> <td>\$700.00</td> <td>Periodically</td> <td>1</td> <td>\$700.00</td> <td>Dt Paid Was not Provided</td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td colspan="4" style="text-align: right;">Total for the Period A:</td> <td>\$3,504.90</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Period B: 01/01/2017 - 11/30/2017</p> <table border="1" style="width: 100%; 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Lesson 1: Determine Qualifying Expense Adjustments Trainee Guide

PowerPoint Slides	Notes
<p>Medicare Premiums</p> 	

Financial Decisions
Medical Expenses
Financial Interfaces

Return To Summary

Period A + B Expenses: \$1,303.00
 Period B + C Expenses: \$1,308.00

Expenses Reported, No Income 306/Old Law Adjustment Medical Expense less than 5% deductible

Period A: 11/25/2016 - 12/31/2016

Medical Expense	Amount	Frequency	Multiplier	Sub Total	Reject Reason	CME	Relationship	Description
Medicare Premiums (SMIB)	\$104.90	Monthly	1	\$104.90		<input checked="" type="checkbox"/>		
Total for the Period A:				\$104.90				



Period B: 01/01/2017 - 11/30/2017

Medical Expense	Amount	Frequency	Multiplier	Sub Total	Reject Reason	CME	Relationship	Description
Medicare Premiums (SMIB)	\$109.00	Monthly	11	\$1,199.00		<input checked="" type="checkbox"/>		
Total for the Period B:				\$1,199.00				

Period C: 12/01/2017 - 12/31/2017

Medical Expense	Amount	Frequency	Multiplier	Sub Total	Reject Reason	CME	Relationship	Description
Medicare Premiums (SMIB)	\$109.00	Monthly	1	\$109.00		<input checked="" type="checkbox"/>		
Total for the Period C:				\$109.00				

* Authorized medical expenses

PowerPoint Slides	Notes
<p>Enter Medical Expenses in VBMS-A Demo</p> 	
<p>Return to Financial Decision Tab in VBMS-A Demo</p> 	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Practice Exercise—Compare Medical Expenses</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of three. ○ Use Claim 1. ○ Complete Appendix A: Part B—Compare Medical Expenses worksheet. ○ Be prepared to share your finished activity with other groups. • Time allowed: 10 minutes 	
<p>Practice Exercise—Compare Medical Expenses Answers</p>	

Effective (Entitlement) Date:

Payment (Financial Decision Effective) Date:


Medical Expenses:

Description	Amount Paid	Date Paid	Provider	Paid For	UME or CME?

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Enter Nursing Home/Assisted Living/In-home Care Related Expenses</p> <ul style="list-style-type: none"> • Nursing home related expenses: <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.3.j. (Medical Expense Deduction for Nursing Home Fees) • Assisted living facility expenses: <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.3.l. (Medical Expense Deduction for ALF Fees) • In-home care related expenses: <ul style="list-style-type: none"> ○ M21-1 V.iii.1.G.3.p. (In-Home Attendants for a Disabled Person Not in Need of A&A or Housebound) ○ M21-1 V.iii.1.G.3.q. (Documentation of In-Home Attendant Fees) 	
<p>Apply Omnibus if Increased Award</p> <p>Omnibus applies to the following types of claims:</p> <ul style="list-style-type: none"> • Original awards • Reopened awards • Increased award 	

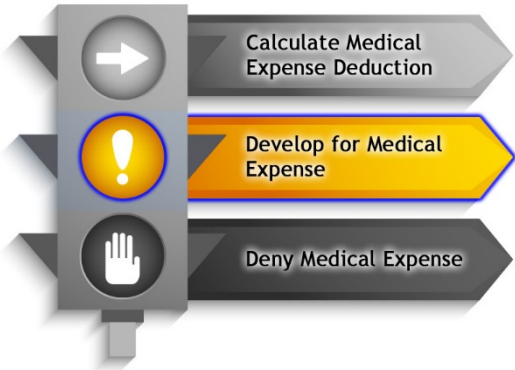

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Practice Exercise—Enter Medical Expenses</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of three. ○ Access Claim 2. ○ Use Appendix A: Part C—Enter Medical Expenses worksheet if work space is needed. ○ Enter medical expenses to VBMS-A academy mode. ○ Be prepared to share the total medical expense amount with other groups. • Time allowed: 15-20 minutes 	
<p>Practice Exercise—Enter Medical Expenses Answers</p>	
<p>Award Adjustment for Medical Expense</p> 	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**



Lesson 1: Determine Qualifying Expense Adjustments Trainee Guide

PowerPoint Slides	Notes
<p>Develop for Medical Expense (1 of 2)</p> 	
<p>Develop for Medical Expense (2 of 2)</p> 	

Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide

PowerPoint Slides	Notes
<p>Class Activity—Develop for Medical Expenses</p> <ul style="list-style-type: none">• Instructions<ul style="list-style-type: none">○ Access Appendix B: VA Form 21P-8416.○ Work as a class to identify any missing information and/or information that needs development.• Time allowed: 10-15 minutes	
<p>Class Activity—Develop for Medical Expenses Answers</p>	
<p>Practice Exercise—Develop for Medical Expenses</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three.○ Access Claim 3.○ Complete Appendix A: Part D—Develop for Medical Expenses worksheet.○ Be prepared to share your finished activity with other groups.• Time allowed: 15 minutes	

Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide

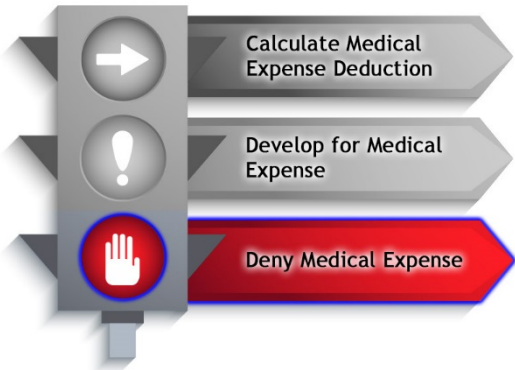

PowerPoint Slides	Notes
Practice Exercise—Develop for Medical Expenses Answers	

Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide

Does each medical expense include the following required information?

✓	Required Information	Details of Missing Information
	<i>Purpose</i>	
	<i>Amount Paid by claimant</i>	
	<i>Date Paid</i>	
	<i>Name of Provider</i>	
	<i>For Whom Paid</i>	
	<i>Nursing home or other facility care statement (if applicable)</i>	
	<i>Doctors statement in order to allow an specific expenses (if applicable)</i>	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	
<p>Deny the Medical Expense</p> 	
<p>Deny the Medical Expense Demo</p> 	
<p>Practice Exercise—Medical Expense Adjustment</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Work on your own.○ Access Claim 4.○ Enter the medical expense adjustment information into VBMS-A academy mode.○ Use Appendix A: Part E—Medical Expense Adjustment worksheet to show your work if needed.○ Be prepared to share the total medical expense adjustment amount with other trainees. <p>Time allowed: 15-20 minutes</p>	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

Effective (Entitlement) Date:






Payment (Financial Decision Effective) Date:

Medical Expenses:




Description	Amount Paid	Date Paid	Provider	Paid For	UME or CME?

PowerPoint Slides	Notes
<p>Practice Exercise—Medical Expense Adjustment Group Review</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of three. ○ Review your medical expense adjustment with the other members of the group. ○ Discuss with your group the rationale for your answers. • Time allowed: 7-10 minutes 	
<p>Practice Exercise—Medical Expense Adjustment Answers</p>	


**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Questions?</p> 	
<p>Final Expense Adjustments</p>  <p>Medical Expense Adjustments</p>  <p>Final Expense Adjustments</p>  <p>Educational Expense Adjustments</p>	
<p>Determine Qualifying Final Expense Adjustments</p> 	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Enter the Final Expense Adjustment</p>  <p>A traffic light graphic with three horizontal arrows pointing right. The top arrow is green and contains a white right-pointing arrow icon, with the text "Enter Final Expense" to its right. The middle arrow is grey and contains a white exclamation mark icon, with the text "Develop for Final Expense" to its right. The bottom arrow is dark grey and contains a white hand icon with fingers spread, with the text "Deny Final Expense" to its right.</p>	
<p>Enter the Final Expense Demo</p>  <p>A circular button with a blue gradient and a white border, containing the word "DEMO" in white capital letters.</p>	
<p>Develop for Final Expense</p>  <p>A traffic light graphic with three horizontal arrows pointing right. The top arrow is grey and contains a white right-pointing arrow icon, with the text "Enter Final Expense" to its right. The middle arrow is yellow and contains a white exclamation mark icon, with the text "Develop for Final Expense" to its right. The bottom arrow is dark grey and contains a white hand icon with fingers spread, with the text "Deny Final Expense" to its right.</p>	
<p>Develop for Final Expense Answers</p>	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Deny the Final Expense</p> 	
<p>Practice Exercise—Final Expense Adjustment</p> <ul style="list-style-type: none">• Instructions:<ul style="list-style-type: none">○ Divide into groups of three.○ Access Claim 5.○ Enter the final expenses into the VBMS-A using the academy mode.○ Use Appendix A: Part F—Final Expense Adjustment worksheet to show your work.○ Be prepared to share your finished activity with other trainees.• Time allowed: 15 minutes	
<p>Practice Exercise— Final Expense Adjustment Answers</p>	





Lesson 1: Determine Qualifying Expense Adjustments Trainee Guide

Effective (Entitlement) Date:

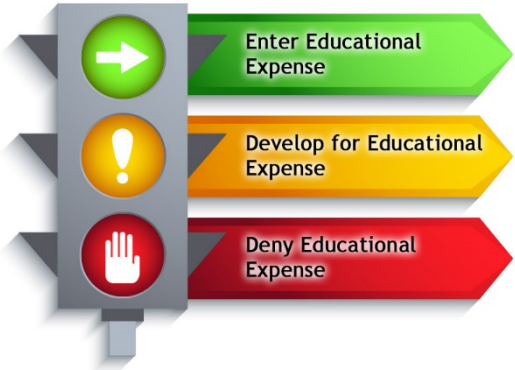
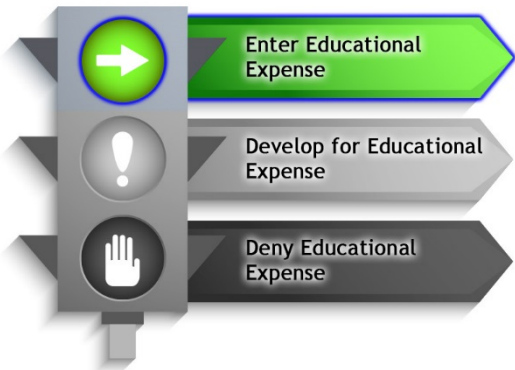

Payment (Financial Decision Effective) Date:

Final Expenses:

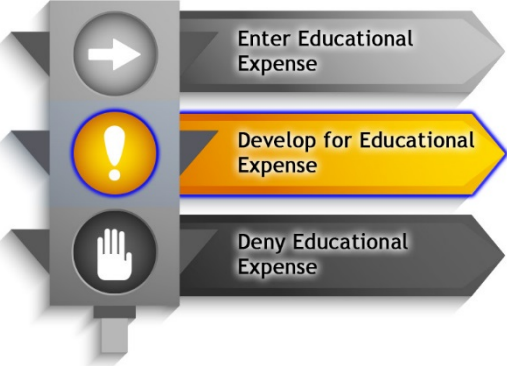
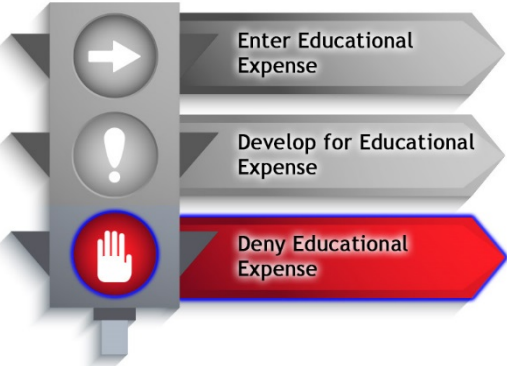
Statement as to the Nature of Death	Amount Paid	Date Paid	Identity of Creditor (For Whom Paid)

PowerPoint Slides	Notes
<p>Questions?</p> 	
<p>Educational Expense Adjustments</p> <div style="display: flex; justify-content: space-around; align-items: flex-end;"> <div style="text-align: center;">  <p>Medical Expense Adjustments</p> </div> <div style="text-align: center;">  <p>Final Expense Adjustments</p> </div> <div style="text-align: center;">  <p>Educational Expense Adjustments</p> </div> </div>	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Determine Qualifying Educational Expense Adjustments</p> 	
<p>Enter the Educational Expense</p> 	
<p>Enter the Educational Expenses Demo</p> 	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Develop for Educational Expense</p> 	
<p>Deny the Educational Expense</p> 	

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
<p>Practice Exercise—Educational Expense Adjustment</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of three. ○ Access Claim 6. ○ Enter the educational expense in VBMS-A using the academy mode. ○ Complete Appendix A: Part G—Educational Expense Adjustment worksheet to show your work if needed. ○ Be prepared to share your finished activity with other trainees. • Time allowed: 15 minutes 	



Effective (Entitlement) Date:

Payment (Financial Decision Effective) Date:

Educational Expenses:

Description	Amount Paid	Date Paid	Provider	Paid For

**Lesson 1: Determine Qualifying Expense Adjustments
Trainee Guide**

PowerPoint Slides	Notes
Practice Exercise— Educational Expense Adjustment Answers	
Questions? 	
Lesson Summary 	
What's Next Phase 5, Part 5, Lesson 2: Determine Amended Income Adjustments	