



PENSION AND FIDUCIARY SERVICE

PMC VSR Advanced Core Course
Phase 5: Stages of a Claim
Part 1: Determine Eligibility

Lesson 6: End Product (EP) Codes

Lesson Plan

October 28, 2016

Version 1.0

Lesson 6: End Product (EP) Codes
Lesson Plan

EP Codes

Lesson Overview

Topic	Description
Time Estimate:	1.5 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 show PMC VSRs how to decide whether the end product established by the claims assistant is correct.
Prerequisite Training Requirements:	Prior to taking the End Product Codes lesson, trainees must complete PMC VSR Core Course Phases 1–4, and Phase 5, Part 1, lessons 1–5. (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) • M21-1 III.ii.2.D.1.b (Definition: Reopened Claim) • M21-1 III.ii.2.F.1.a (Definition: Request for Reconsideration) • M21-4 Appendix B (End Product Codes and Work-Rate Standards for Quantitative Measurements) • M21-4 Appendix B.1.a (Correct EP Use and Work Measurement) • M21-4 Appendix B.1.f (Third Digit Modifiers) • M21-4 Appendix B.II (End Products - Compensation, Pension, and Fiduciary Operations) • End Product (EP) Codes job aid • Modifying End Product (EP) Codes job aid
Knowledge Check:	Phase 5: Stages of a Claim, Part 1 (a): Initial Screening and Claim Establishment Knowledge Check



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Topic	Description
Technical Competencies:	<ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR)
Lesson Objectives:	<p>Confirm End Product (EP) is correct</p> <ul style="list-style-type: none"> • Define an EP code • Verify the EP code matches the type of claim • Verify the correct EP code is used in SHARE, MAP-D, and VBMS • Modify the EP code under Pending Issue File (PIF) change (PCHG)
What You Need:	<ul style="list-style-type: none"> • Lesson Plan • Master Course Map learning aid • Slides • Projector • Access to VBA Intranet • Access to CPKM • Access to the following job aids from VSR Assistant: <ul style="list-style-type: none"> ○ End Product (EP) Codes job aid ○ Modifying End Product (EP) Codes job aid • Access to the SHARE and VBMS demo portal <ul style="list-style-type: none"> ○ Sample claimant file with incorrect EP code on the demo SHARE, MAP-D, and VBMS


Instructor Notes

This lesson provides trainees with the information and references to be able to decide whether the EP code established by the Claims Assistant is correct. The lesson presents opportunities to participate in group discussions and practice-scenarios to confirm whether the EP code is correct and to practice modifying an incorrect EP code. Trainees will use the CPKM Portal to access M21-4 Appendix B.


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PowerPoint Slides	Instructor Activities
<p>End Product (EP) Codes</p>	<p>DISPLAY slide</p> <p>1. "End Product (EP) Codes"</p> <p>INTRODUCE yourself as the instructor.</p> <p>INTRODUCE the lesson.</p>
<p>You Are Here</p> <pre> graph TD subgraph MainFlow [Main Process Flow] 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] end subgraph SubProcess [Sub-process for PHASE 5 PART 1] P1a[PHASE 5 PART 1a Initial Screening and Establish a Claim] --> P1b[PHASE 5 PART 1b Basic Eligibility] P1b --> P1c[PHASE 5 PART 1c Income Eligibility] P1c --> P1d[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] end P1a --- P1 </pre>	<p>DISPLAY slide</p> <p>2. "You Are Here"</p>  <p>REFER to the Master Course Map learning aid in the Trainee Guide.</p> <p>INFORM trainees that Phase 5, Part 1: Determine Eligibility contains four subparts. Subpart 1a contains several lessons that focus on the initial screening and establishing a claim.</p>  <p>EMPHASIZE that each of these lessons relates to the others as part of the initial screening process.</p>

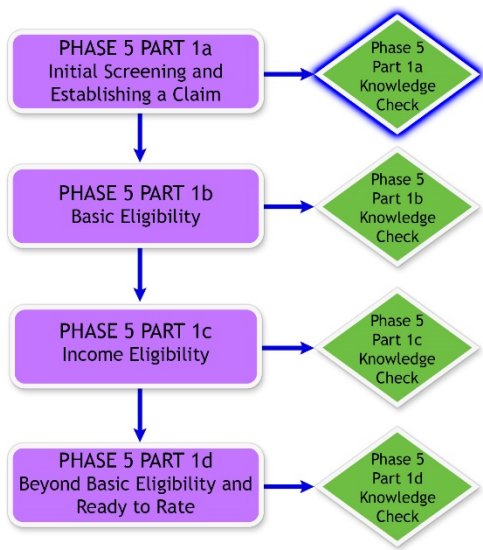

Lesson 6: End Product (EP) Codes
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PowerPoint Slides	Instructor Activities
<p>Initial Screening</p> <ul style="list-style-type: none"> • Complete or Incomplete Applications for Benefits • Fully Developed Claims • Flash, Expedited (Priority), Previous, Dual or Reopened/New Claims • Date of Claim • Validate POA • End Product Codes • Introduction to Old Law and Section 306 Pension 	<p>DISPLAY slide 3. "Initial Screening"</p> <p>EXPLAIN that during the initial screening process, the PMC VSR determines whether the Claims Assistant has processed the initial screening correctly and evaluates other aspects of the claim.</p> <p>INFORM trainees that this lesson focuses on confirming that the EP code is correct as part of the initial screening process.</p> <p>REMINDE trainees that they have learned how to perform the following parts of the initial screening:</p> <ul style="list-style-type: none"> • Determine whether the application for benefits is complete or incomplete. • Distinguish FDCs from standard claims. • Confirm the special claim types. • Confirm the Date of Claim (DOC). • Validate the Power of Attorney (POA).
<p>Ice Breaker Activity (1 of 2)</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Access End Product (EP) Codes job aid from the VSR Assistant. ○ Read the scenario on the next slide. ○ Use the job aid to confirm the EP code and Date of Claim (DOC) are correct. ○ Write down your answer. • Time allowed: 5–7 minutes 	<p>DISPLAY slide 4. "Ice Breaker Activity (1 of 2)"</p>  <p>REFER to the End Product (EP) Codes job aid.</p> <p>DIRECT trainees to use the End Product (EP) Codes job aid in the VSR Assistant to confirm the EP code and Date of Claim (DOC) are correct based on the scenario on the next slide. Have them write down their answer and then share with the class.</p> <p>REMINDE trainees that they learned how to confirm the DOC in a previous lesson.</p>

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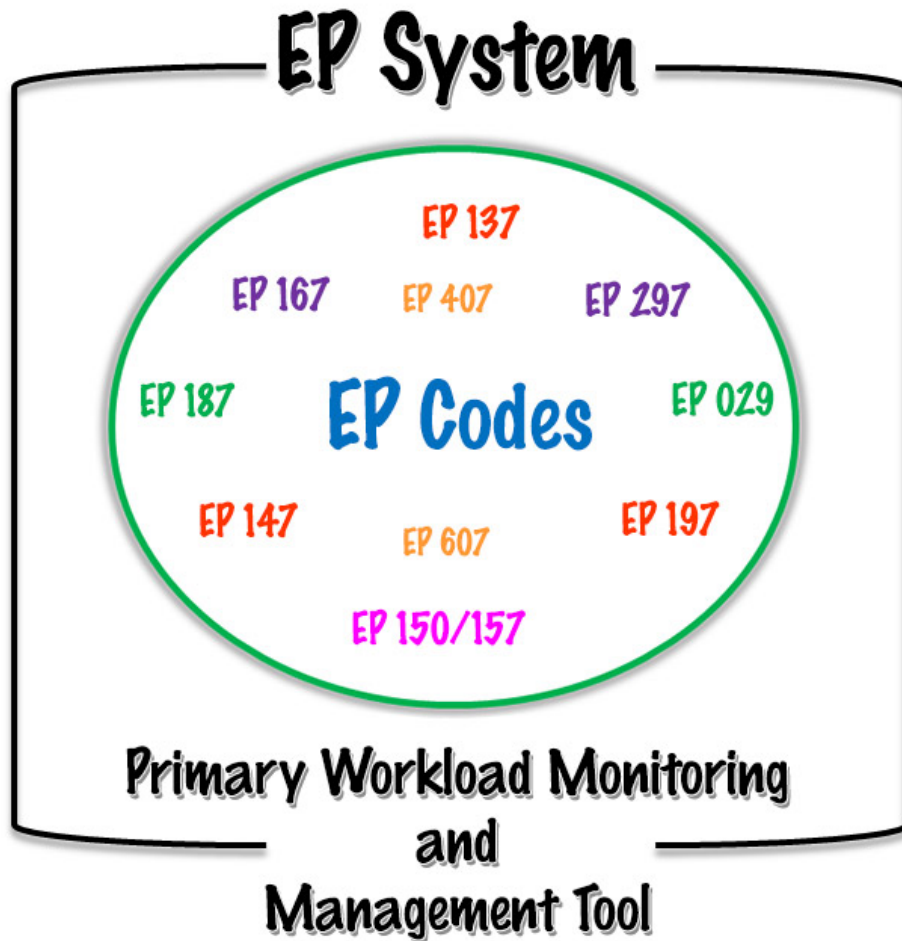
PowerPoint Slides	Instructor Activities
<p>Ice Breaker Activity (2 of 2)</p> <p>Scenario:</p> <p>Megan Andrews submits a completed VA Form 21-534EZ (Application for DIC, Death Pension, and/or Accrued Benefits) indicating she wants survivor's pension on January 7, 2016. A review of the corporate record indicates no previous claims have been submitted. The Claims Assistant selected an EP of 190 and a DOC of 01/07/2016 for this claim.</p>	<p>DISPLAY slide</p> <p>5. "Ice Breaker Activity (2 of 2)"</p> <p>READ the scenario.</p> <p>PROVIDE the correct answer:</p> <ul style="list-style-type: none"> • <i>EP code is not correct—should be EP 197</i> • <i>DOC is correct—01/07/2016</i> <p>EXPLAIN the importance of properly identifying the EP code and making sure that the EP is entered correctly in VBA applications.</p> <p>TELL the trainees that death pension is now referred to as survivor's pension and they will likely see it both ways.</p> <div style="text-align: center;">  </div> <p>EMPHASIZE that the End Product (EP) Codes job aid will be used throughout this lesson. Direct the trainees to keep the document open for quick accessibility.</p>
<p>Technical Competencies</p> <ul style="list-style-type: none"> • Program Benefits and Eligibility (PMC VSR) • Processing Claims (PMC VSR) • VBA Applications (PMC VSR) 	<p>DISPLAY slide</p> <p>6. "Technical Competencies"</p> <p>EXPLAIN that this lesson prepares trainees for the program benefits and eligibility, processing claims, and VBA Applications competencies.</p>


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PowerPoint Slides	Instructor Activities
<p>Lesson Objectives</p> <p>Confirm End Product (EP) code is correct</p> <ul style="list-style-type: none"> Define an EP code. Verify the EP code matches the type of claim. Verify the correct EP code is used in SHARE, MAP-D, and VBMS. Modify the EP code under Pending Issue File (PIF) change (PCHG). 	<p>DISPLAY slide</p> <p>7. "Lesson Objectives"</p> <p>PRESENT the objectives for the lesson.</p>
<p>Knowledge Check</p>  <pre> graph TD A[PHASE 5 PART 1a Initial Screening and Establishing a Claim] --> B{Phase 5 Part 1a Knowledge Check} A --> C[PHASE 5 PART 1b Basic Eligibility] C --> D{Phase 5 Part 1b Knowledge Check} C --> E[PHASE 5 PART 1c Income Eligibility] E --> F{Phase 5 Part 1c Knowledge Check} E --> G[PHASE 5 PART 1d Beyond Basic Eligibility and Ready to Rate] G --> H{Phase 5 Part 1d Knowledge Check} </pre>	<p>DISPLAY slide</p> <p>8. "Knowledge Check"</p> <p>INFORM the trainees that they will be assessed on this content in the Phase 5: Stages of a Claim, Part 1(a): Initial Screening and Claim Establishment Knowledge Check. The Knowledge Check will be given after Phase 5, Part 1, Lesson 8.</p>  <p>REFER to the Master Course Map learning aid, <i>Lessons by Phase</i> section, to review the lessons included within the Knowledge Check.</p>




Lesson 6: End Product (EP) Codes
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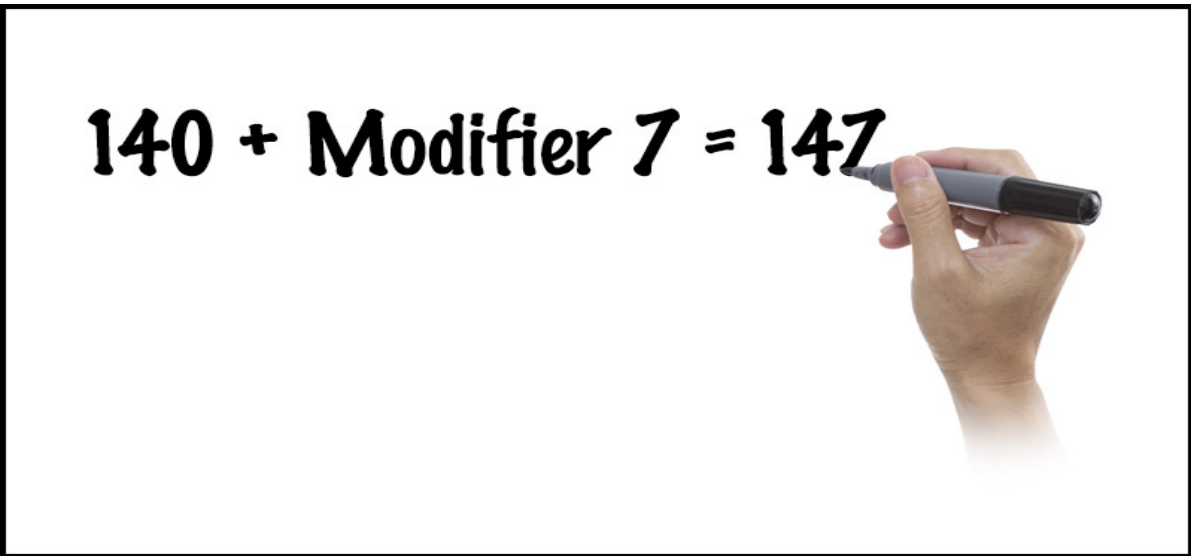
PowerPoint Slides	Instructor Activities
<p>What Is an EP Code?</p> <ul style="list-style-type: none">• EP codes are three-digit numbers.• Each claim is established with an EP code.• EP codes are part of the EP system that is the primary workload monitoring and management tool. <div data-bbox="170 779 651 1283" style="border: 1px solid black; padding: 10px; text-align: center;"><p>EP System</p><p>EP Codes</p><p>Primary Workload Monitoring and Management Tool</p></div>	<p>DISPLAY slide</p> <p>9. "What is an EP Code?"</p> <div data-bbox="716 436 813 537"></div> <p>ASK what is an EP Code?</p> <div data-bbox="716 615 813 716"></div> <p>REFER to CPKM Portal to view M21-4 Appendix B.1.a (Correct EP Use and Work Measurement). Have trainees navigate to the correct page and ask one of them read the reference aloud.</p> <p>EXPLAIN that an EP is a three-digit code that facilitates proper control of pending workloads and appropriate work measurement credit. With few exceptions, the EP should remain pending until all required actions on the claim have been completed.</p> <p>DISCUSS the use of EP codes. Use your personal experience to guide your discussion.</p>





PowerPoint Slides	Instructor Activities
<p>Third-digit Modifiers (1 of 2)</p> <ul style="list-style-type: none"> • “Modifier” and “Incremental” are used interchangeably. • EP codes may be modified to identify: <ul style="list-style-type: none"> ○ Issues ○ Type of claim ○ Incremental multiple claims of the same EP category 	<p>DISPLAY slide 10. “Third-digit Modifiers (1 of 2)”</p> <p>EXPLAIN that the third digit of an EP code can be modified based on the type of claim or issue. The third-digit modifier also is referred to as <i>incremental</i>.</p> <p></p> <p>DEMONSTRATE the incremental drop-down menu in SHARE.</p>

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PowerPoint Slides	Instructor Activities
<p data-bbox="154 342 625 378">Third-digit Modifiers (2 of 2)</p> <div data-bbox="167 520 690 720" style="border: 1px solid black; padding: 10px;"><p data-bbox="186 541 592 592">140 + Modifier 7 = 147</p></div>	<p data-bbox="716 342 941 373">DISPLAY slide</p> <p data-bbox="716 384 1218 415">11. "Third-digit Modifiers (2 of 2)"</p>  <p data-bbox="716 562 1429 672">REFER to CPKM Portal to view M21-4 Appendix B.1.f (Third Digit Modifiers). Choose a trainee to read the reference aloud.</p> <p data-bbox="716 699 1429 850">DISCUSS the different modifiers and their uses. Let the trainees know that the modifier 7 is used for pension claims. Use the following example to guide your discussion:</p> <ul data-bbox="763 877 1161 909" style="list-style-type: none">• 140 + modifier 7 = 147  <p data-bbox="716 1056 1453 1207">REFER to the End Product (EP) Codes job aid in the VSR Assistant. Have trainees navigate to the EP 147. Have one of them read the first bullet in the description of EP 147.</p>





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PowerPoint Slides	Instructor Activities
<p>List of Authorized EP Codes</p> <p>Pension Claim Types:</p> <ul style="list-style-type: none"> • Original • Maintenance • New • Reconsidered 	<p>DISPLAY slide</p> <p>12. "List of Authorized EP Codes"</p>  <p>REFER to CPKM Portal to view M21-4 Appendix B.II (End Products - Compensation, Pension, and Fiduciary Operations). Have trainees navigate to the correct section.</p> <p>EXPLAIN that section II of Appendix B provides the comprehensive list of authorized EP codes for both compensation and pension claims.</p>  <p>EMPHASIZE that the list of authorized EP codes are organized based on different claim types.</p>
<p>EP Codes and Claim Types (1 of 3)</p> <ul style="list-style-type: none"> • When should the original EP code be used? • When are maintenance EP codes most commonly used? 	<p>DISPLAY slide</p> <p>13. "EP Codes and Claim Types (1 of 3)"</p> <p>DISCUSS that EP codes are categorized based on the different claim types. Use the following questions to guide your discussion:</p> <ul style="list-style-type: none"> • When should the original EP code be used? <ul style="list-style-type: none"> ○ <i>An original EP code should be used when the Veteran or claimant is applying for the first time for any VBA benefit.</i> • When are maintenance EP codes most commonly used? <ul style="list-style-type: none"> ○ <i>Maintenance EPs are generally used for awards that are already running.</i> ○ <i>Maintenance applies to non-rating.</i>

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PowerPoint Slides	Instructor Activities
<p>EP Codes and Claim Types (2 of 3)</p> <ul style="list-style-type: none">• Reopened claims are now referred to as new claims for pension purposes.• Reopened claims are still used for DIC and compensation claims.	<p>DISPLAY slide 14. "EP Codes and Claim Types (2 of 3)"</p> <p>EXPLAIN that a reopened claim is now referred to as a new claim for pension purposes.</p> <p></p> <p>REFER to view M21-1 III.ii.2.D.1.b (Definition: Reopened Claim) Have one of the trainees read the Notes section aloud. Have one of the trainees summarize what this means in his or her own words.</p> <p></p> <p>EMPHASIZE that reopened claims are still used for DIC claims.</p>

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PowerPoint Slides	Instructor Activities
<p>EP Codes and Claim Types (3 of 3)</p> <ul style="list-style-type: none"> • A reconsidered EP code would be any EP code OTHER than an original EP. • Example EP codes for reconsidered claims: <ul style="list-style-type: none"> ○ 137 (reconsideration of dependency) ○ 150 (reconsideration of income / net worth) ○ 029 (reconsideration of DIC) ○ 127 (reconsideration of competency or SMP) ○ 160 (reconsideration of burial) ○ 290 (reconsideration of eligibility) 	<p>DISPLAY slide</p> <p>15. "EP Codes and Claim Types (3 of 3)"</p> <p></p> <p>ASK what is a request for reconsideration?</p> <p></p> <p>REFER to view M21-1 III.ii.2.F.1.a (Definition: Request for Reconsideration). Have one of them read the reference aloud to answer the question.</p> <p>DISCUSS EP codes for request for reconsideration. Use the following key points to guide your discussion.</p> <ul style="list-style-type: none"> • If a claim is received before the expiration of one year, it would be considered a request for reconsideration. • A prescribed form is not required for a request for reconsideration. • Reconsidered EP codes would be any EP code other than an original EP. <p>DIRECT the trainees to the example EP codes for reconsidered claims. Point out that these are common pension EP codes used for maintenance and new claims but are also used for request for reconsiderations.</p>


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PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Exercise</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Each group has the following roles: <ul style="list-style-type: none"> ▪ Announcer—Gives the group the EP code from the left column of the EP Code Worksheet in Trainee Guide ▪ Navigator—Looks up the EP code in the End Product (EP) Codes job aid ▪ Transcriber—Notes the answer in right column of the EP Code Worksheet in Trainee Guide ○ Using the End Product (EP) Codes job aid as a reference, select the claim type (original, reopened, new, or maintenance) for the given the EP code. • Time allowed: 10–12 minutes 	<p>DISPLAY slides</p> <p>16. “Group Activity—Practice Exercise”</p> <p>DIVIDE trainees into groups of three. Assign groups or ask trainees to form groups.</p> <p>EXPLAIN that each group needs to have the following roles:</p> <ul style="list-style-type: none"> • Announcer— Gives the group the EP code. • Navigator— Looks up the EP Code in the End Product (EP) Codes job aid in Trainee Guide. • Transcriber—Notes the answer in EP Code Worksheet in Trainee Guide. <p>DIRECT trainees to choose their roles within the group.</p> <p>TELL the groups to access the End Product (EP) Codes job aid from the VSR Assistant and the EP Code Worksheet in the Trainee Guide.</p> <p>GIVE the instructions for the activity. Using the job aid as a reference, select the claim type for the EP code. There may be more than one claim type for the EP code. Groups will have 10–12 minutes to discuss and record their answers.</p>

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Group Activity: Practice Exercise: Select all that apply

EP Code	Pension/DIC Claim Types Original, Reopened, New or Maintenance
EP 137	
EP 029	
EP 187	
EP 147	
EP 127	
EP 197	
EP 150/157	

PowerPoint Slides	Instructor Activities																
<p>Group Activity—Practice Exercise Answers (1 of 4)</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #e1eef6;"> <th style="text-align: left;">EP Code</th> <th style="text-align: left;">Pension/DIC Claim Type Original, Reopened, or Maintenance</th> </tr> </thead> <tbody> <tr><td>EP 137</td><td><i>New or Maintenance</i></td></tr> <tr><td>EP 029</td><td><i>Reopened</i></td></tr> <tr><td>EP 187</td><td><i>Original</i></td></tr> <tr><td>EP 147</td><td><i>Original</i></td></tr> <tr><td>EP 127</td><td><i>New</i></td></tr> <tr><td>EP 197</td><td><i>Original</i></td></tr> <tr><td>EP 150/157</td><td><i>New or Maintenance</i></td></tr> </tbody> </table>	EP Code	Pension/DIC Claim Type Original, Reopened, or Maintenance	EP 137	<i>New or Maintenance</i>	EP 029	<i>Reopened</i>	EP 187	<i>Original</i>	EP 147	<i>Original</i>	EP 127	<i>New</i>	EP 197	<i>Original</i>	EP 150/157	<i>New or Maintenance</i>	<p>DISPLAY Slide 17. "Group Activity—Practice Answers (1 of 4)"</p> <p>PROVIDE the answers to the group activity.</p> <div style="text-align: center; margin: 10px 0;">  </div> <p>EMPHASIZE that the EP Codes job aid provides the most common EP codes used for pension claims but the M21-4 Appendix B Section II (End Products - Compensation, Pension, and Fiduciary Operations) should be used as the comprehensive and up-to-date list of EP codes.</p>
EP Code	Pension/DIC Claim Type Original, Reopened, or Maintenance																
EP 137	<i>New or Maintenance</i>																
EP 029	<i>Reopened</i>																
EP 187	<i>Original</i>																
EP 147	<i>Original</i>																
EP 127	<i>New</i>																
EP 197	<i>Original</i>																
EP 150/157	<i>New or Maintenance</i>																

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Group Activity Answers

EP Code	Pension/DIC Claim Types Original, Reopened, New or Maintenance
EP 137	<i>New or Maintenance</i>
EP 029	<i>Reopened</i>
EP 187	<i>Original</i>
EP 147	<i>Original</i>
EP 127	<i>New</i>
EP 197	<i>Original</i>
EP 150/157	<i>New or Maintenance</i>


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PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Exercise Answers (2 of 4)</p> <p>Original Claims:</p> <ul style="list-style-type: none"> • EP 187—This EP is used for a Veteran who is applying for pension benefits and has <i>never</i> applied for any VBA benefits before. • EP 197—This EP is used for surviving spouses or children_of Veterans applying for pension who have <i>never</i> applied before. • EP 147—This EP is used for surviving spouses or children of Veterans applying for DIC benefit (Dependency and Indemnity Compensation) service connected survivors' benefit who have <i>never</i> applied before. 	<p>DISPLAY Slide 18. "Group Activity—Practice Answers (2 of 4)"</p> <p>DISCUSS the original EP code answers. These EP codes fall under the original claim type because:</p> <ul style="list-style-type: none"> • EP 187—This EP code is used for a Veteran who is applying for pension benefits and has <i>never</i> applied before. • EP 197—This EP code is used for surviving spouses and children of Veterans applying for pension who have <i>never</i> applied before. • EP 147—This EP code is used for surviving spouses and children of Veterans applying for DIC benefit (Dependency and Indemnity Compensation) service connected survivors' benefit who have <i>never</i> applied before.





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PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Exercise Answers (3 of 4)</p> <p>New/Reopened Claims:</p> <ul style="list-style-type: none">• EP 029— This EP applies to reopened DIC claims and requests for aid and attendance while receiving DIC.• EP 127—This EP applies to new disability pension and survivors' pension claims.	<p>DISPLAY Slide 19. "Group Activity—Practice Answers (3 of 4)"</p> <p>DISCUSS the Reopened and New EP code answers. These EP codes fall under these claim type because:</p> <ul style="list-style-type: none">• EP 029—This EP applies to reopened DIC claims and requests for aid and attendance while receiving DIC.• EP 127—This EP applies to new disability pension and survivors' pension claims. <p></p> <p>EMPHASIZE that EP 029 and EP 127 are EP codes could also fall under the reconsidered claim type.</p>




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PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Answers (4 of 4)</p> <p>Maintenance claims:</p> <ul style="list-style-type: none"> • EP 137—This EP applies to all actions involving dependency determinations where the primary issue involved is entitlement based on relationship or dependency. • EP 150/157—This EP applies to survivors and disability claims where the issue involved is entitlement of benefits based on income or estate factors. This EP also applies to adjustments based on medical expenses submitted. 	<p>DISPLAY Slide 20. “Group Activity—Practice Answers (4 of 4)”</p> <p>DISCUSS the Maintenance EP code answers. These EP codes fall under the maintenance claim type because:</p> <ul style="list-style-type: none"> • EP 137—This EP applies to all actions involving dependency determinations where the primary issue involved is entitlement of benefits based on relationship or dependency. <ul style="list-style-type: none"> ○ Veteran tells us that he was just married • EP 150/157—This EP applies to survivors and disability claims where the issue involved is entitlement of benefits based on income or estate factors. This EP also applies to adjustments based on medical expenses submitted. <ul style="list-style-type: none"> ○ Veteran tells VA that he just won \$1000 from the lottery ○ Veteran submits a medical expense report <p style="text-align: center;"></p> <p>EMPHASIZE that EP 137 and EP 150/157 are EP codes could also fall under the new claim type.</p> <p>NOTE that the Philadelphia PMC uses EP 150 instead of 157 for these types of claims.</p>



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PowerPoint Slides	Instructor Activities
<p>EP Codes in VBA Applications</p> <p>EP Code can be verified in the following VBA Applications:</p> <ul style="list-style-type: none">• SHARE• MAP-D• VBMS 	<p>DISPLAY Slide</p> <p>21. “EP Codes in VBA Applications”</p>  <p>ASK in what VBA Applications can you verify the EP Code is correct?</p> <ul style="list-style-type: none">• <i>You can verify the EP Code is correct in:</i><ul style="list-style-type: none">○ <i>SHARE</i>○ <i>MAP-D</i>○ <i>VBMS</i> <p>DISCUSS the importance of verifying the EP code is correct.</p>  <p>DEMONSTRATE where to locate an EP code in:</p> <ul style="list-style-type: none">• SHARE• MAP-D• VBMS  <p>EMPHASIZE that these systems are connected and so updates to SHARE are automatically indicated in MAP-D and VBMS.</p>

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PowerPoint Slides	Instructor Activities
<p>Modifying an EP Code</p> <p>Modifying an End Product (EP) code involves using the PIF change (PCHG) function in SHARE.</p>	<p>DISPLAY slide 22. "Modifying an EP Code"</p> <p></p> <p>ASK how do you modify an incorrect EP code?</p> <ul style="list-style-type: none">• <i>By modifying the EP code in PIF change (PCHG).</i> <p>EXPLAIN that modifying an EP code involves using the PCHG function in SHARE.</p> <p>DIRECT trainees to the Modifying End Product (EP) Codes job aid in the VSR Assistant. Have them take turns reading the steps for modifying the EP code using the PCHG in SHARE aloud.</p> <p></p> <p>DEMONSTRATE how to navigate to the PCHG screen in SHARE.</p> <p></p> <p>EMPHASIZE that once the EP code is modified in SHARE, MAP-D and VBMS will automatically be updated.</p>

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PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of two or three. ○ Each group will receive one sample EP code to change in SHARE. ○ Use the Modifying End Product (EP) Codes job aid in the VSR Assistant to practice the process of modifying the EP code. • Time allowed: 10–15 minutes 	<p>DISPLAY slide 23. “Group Activity—Practice”</p> <p>DIVIDE trainees into groups of two or three. Assign groups or ask trainees to form groups.</p>  <p>REFER to the SHARE and VBMS demo portals. Assign each group a sample EP code to change in SHARE.</p> <p>GIVE groups 10–15 minutes to practice changing the EP code using the Modifying End Product (EP) Codes job aid in the VSR Assistant.</p>
<p>Group Activity—Practice Exercise</p> <ul style="list-style-type: none"> • Instructions: <ul style="list-style-type: none"> ○ Divide into groups of two or three. ○ Use the End Product (EP) Codes job aid in the VSR Assistant to confirm the EP code is correct based on the scenario. ○ Provide the rationale for your decision. ○ Write answers in the space provided. ○ Submit one answer sheet per group to the instructor. • Time allowed: 8–10 min. 	<p>DISPLAY slide 24. “Group Activity—Practice Exercise”</p> <p>TELL trainees to remain in their assigned groups.</p>  <p>REFER to the Group Activity Practice Exercise Worksheet section of the Trainee Guide. Have each group review the scenarios.</p> <p>DIRECT to consult with group members and use the End Product (EP) Codes job aid in the VSR Assistant to confirm the EP code is correct and explain why for each scenario.</p> <p>GIVE the groups 8–10 minutes to complete the practice exercise.</p>

Lesson 6: End Product (EP) Codes

Lesson Plan

Group Activity: Practice Exercise Worksheet

Scenario 1: On February 8, 2016, 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. The Claims Assistant entered an EP 150 into the system.

- Is the EP code correct?
 - *Yes, the EP 150 is correct.*
- What is the rationale for your decision?
 - *Rationale: Based on the scenario, the EP code would be 150 because it is adjustment due to changing income.*

Scenario 2: VA received a VA Form 21-601, Application for Accrued Amounts Due a Deceased Beneficiary, on March 3, 2016, signed by the beneficiary Angela Roberts. Mrs. Roberts is the surviving spouse of Anthony Roberts who is a deceased Veteran previously in receipt of VA compensation benefits. The Claims Assistant entered EP 147 into the system.

- Is the EP code correct?
 - *No, the correct EP is 165.*
- What is the rationale for your decision?
 - *Rationale: Based on the scenario, the EP code would be 165 because the application is for accrued benefits payable based on relationship.*

Scenario 3: VA received a completed VA Form 21-674, Request for Approval of School Attendance, on January 15, 2016, signed by the beneficiary from Joan Smith. Mrs. Smith wants to continue her school age child, Jeffrey, as a dependent on her award. The Claim Assistant entered EP 157 into the system.

- Is the EP code correct?
 - *No, the correct EP is 137.*
- What is the rationale for your decision?
 - *Rationale: Based on the scenario, the EP code would be 137 because the claim applies to actions involving dependency determinations.*



Lesson 6: End Product (EP) Codes
Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Exercise Answers (1 of 3)</p> <p>Scenario 1: On February 8, 2016, Frank Rogers submits a VA Form 21-4138, Statement in Support of Claim, and a Social Security benefit statement indicating he began receiving Social Security benefits in the amount of \$1,250.00 per month. The Claims Assistant entered an EP 150 into the system.</p> <ul style="list-style-type: none"> • Yes, the EP 150 is correct. • Rationale: Based on the scenario, the EP code would be 150 because it is adjustment due to changing income. 	<p>DISPLAY slide</p> <p>25. "Group Activity—Practice Exercise Answers (1 of 3)"</p> <p>DISCUSS each group's answers. For each group's answers, give feedback supported with examples or references.</p>
<p>Group Activity—Practice Exercise Answers (2 of 3)</p> <p>Scenario 2: Angela Roberts, the surviving spouse of Anthony Roberts—a deceased Veteran previously in receipt of VA Compensation benefits—submits a VA Form 21-601, Application for Accrued Amounts Due a Deceased Beneficiary, on March 3, 2016. The Claim Assistant entered EP 147 into the system.</p> <ul style="list-style-type: none"> • No, the correct EP is 165. • Rationale: Based on the scenario, the EP code would be 165 because the application is for accrued benefits payable based on relationship. 	<p>DISPLAY slide</p> <p>26. "Group Activity—Practice Exercise Answers (2 of 3)"</p> <p>DISCUSS each group's answers. For each group's answers, give feedback supported with examples or references.</p>

Lesson 6: End Product (EP) Codes
Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Group Activity—Practice Exercise Answers (3 of 3)</p> <p>Scenario 3: Joan Smith submits a completed VA Form 21-674, Request for Approval of School Attendance, on January 15, 2016, to continue her school age child, Jeffrey, as a dependent on her award. The Claims Assistant entered EP 157 into the system.</p> <ul style="list-style-type: none"> • No, the correct EP is 137. • Rationale: Based on the scenario, the EP code would be 137 because the claim applies to actions involving dependency determinations. 	<p>DISPLAY slide</p> <p>27. “Group Activity—Practice Exercise Answers (3 of 3)”</p> <p>DISCUSS each group’s answers. For each group’s answers, give feedback supported with examples or references.</p>
<p>Lesson Summary</p> <ul style="list-style-type: none"> • What is an EP code? • What is the third-digit modifier used for? • Where should you go to find the authorized list of EP codes? • Why do you need to verify the EP code is correct? • What happens if the EP code is incorrect in a VBA application? • Where do you go to fix an incorrect EP code? 	<p>DISPLAY slide</p> <p>28. “Lesson Summary”</p> <p>REVIEW the key points of the lesson with a guided discussion using the following questions:</p> <ul style="list-style-type: none"> • What is an EP code? • What is the third-digit modifier used for? • Where should you go to find the authorized list of EP codes? • Why do you need to verify the EP code is correct? • What happens if the EP code is incorrect in a VBA application? • Where do you go to fix an incorrect EP code?

Lesson 6: End Product (EP) Codes
Lesson Plan

PowerPoint Slides	Instructor Activities
<p>Questions?</p> 	<p>DISPLAY slide 29. "Questions"</p>  <p>ASK if they have any questions or concerns regarding the end product. Use this time to clear up any confusion or misconceptions about the information presented.</p>
<p>What's Next</p> <p>Phases 5, Part 1, Lesson 7: Introduction to Old Law and Section 306 Pension</p>	<p>DISPLAY slide 30. "What's Next"</p> <p>DISCUSS the upcoming Stage 5, Part 1, Lesson 7: Introduction to Old Law and Section 306 Pension.</p>