Pension and Fiduciary Service

PMC VSR Advanced Core Course Phase 6: Processing Claims

Lesson 15: Process 810 Series Work Items

Lesson Plan

June 2022

Process 810 Series Work Items

Lesson Overview

| Topic | Description |
| --- | --- |
| Time Estimate: | 2.5 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 810 series work items through demonstration, practice, and feedback. |
| Prerequisite Training Requirements: | Prior to taking the Process 810 Series Work Items lesson, trainees must complete the entry-level course Phases 1–5, and Phase 6, lessons 1–14. |
| Target Audience: | This lesson is for entry-level PMC VSRs. |
| Lesson References: | * M21-1 II.i.2.C.2.d. (Placing Claims and 800 Series Work Items Under EP Control) * M21-1 II.i.2.C.6.d. (Procedure for Obtaining a Correct Address for Undeliverable Essential Mail) * M21-1 II.i.2.C.6.k. (Processing 800 Series Work Items Commonly Related to Lack of a Correct Address) * M21-4 Appendix B. Section 3. (800 Series Work Items) * M21-4 Appendix B. Section 4 (Processing 800 Series Work Items) * M21-4 Appendix C, Section 1.b (Index of Claim Labels) * **Processing an Award Adjustment** job aid |
| Technical Competencies: | * Program Benefits and Eligibility (PMC VSR) * Processing Claims (PMC VSR) * VBA Applications (PMC VSR) * Income Counting and Net Worth |
| Lesson Objectives: | * Differentiate the 800 series work items status categories. * Process 810 series work items.   + Determine which 800 series work item was received.   + Determine the reason for the work item.   + Determine the appropriate steps to take to process the 810 series work item.   + Perform the required actions to process the 810 series work item.   + Submit the outcomes of the 810 series work item to the Authorizer. |
| What You Need: | * Lesson Plan * **Access to the Processing an Award Adjustment** job aid from VSR Assistant * *Appendix A* for other job aids * Slides * Whiteboard/flip chart with different colored markers * Applicable VBA applications used in job aids and references listed in Appendix A * EP 810 Series Work Item that is currently pending for Demonstration Example 1 * EP 810 Series Work Item that is currently pending for the Guided Practice Exercise. This claim label should be different than the one used for the Demonstration Example 1. |

Instructor Notes

This lesson provides trainees with instruction, practice, and the needed references to process 810 series work items. Trainees will also be required to demonstrate how to use the systems for processing the work items.

| PowerPoint Slides | Instructor Activities |
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| Lesson 15: Process 810 Series Work Items | **DISPLAY** slide  “Lesson 15: Process 810 Series Work Items”  **INTRODUCE** yourself as the instructor.  **INTRODUCE** the lesson. |
| Lesson Objectives   * Differentiate 800 series work items status categories * Process 810 series work items:   + Determine which 800 series work item was received   + Determine the reason for the work item   + Determine the appropriate steps to take to process an 810 series work item   + Perform the required actions to process an 810 series work item   + Submit the outcomes of the 810 series work item to the Authorizer | **DISPLAY** slide  “Lesson Objectives”  **PRESENT the objectives for the lesson.** |
| Why It Matters!  It is important to know how to process 810 series work items because the PMC VSR will be able to track cases that require follow up action regarding notification of benefit payment transactions. | **DISPLAY** slide  “Why It Matters!”  **EXPLAIN** that it is important to know how to process 810 series work items because the PMC VSR will be able to account for funds that claimants are entitled to receive. |
| Introduction to 800 Series Work Items   * According to M21-4 Appendix B.3.a. (Definition: 800 Series Work Items) an 800 series work item is a system-generated message issued to assist VSCs and PMCs in identifying and tracking cases that require follow-up action. * Important:   + Primarily for tracking; do NOT complete any development, rating, or award actions under an 800 series work item.   + Manually establishing an 800 series work item is not possible. | **DISPLAY** slide  “Introduction to 800 Series Work Items”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** trainees to the M21-4 Appendix B.3.a. (Definition: 800 Series Work Items) and to the **Claim Types** job aid.  Sign with exclamation point  **EMPHASIZE** the following important points about 800 series work items:   * **They are used primarily for tracking; PMC VSRs should NOT complete any development, rating, or award actions under an 800 series work item.** * **Manually establishing an 800 series work item is not possible.**   This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK trainees whether they have any questions about the introductory information for 800 series work items.** |

| PowerPoint Slides | Instructor Activities |
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| 800 Series Work Items Claim Labels  A blue label tag with the phrase 800 Series Work Items Claim Labels   * Each 800 series work item status category has additional subcategories called claim labels. * Claim labels specify the issue that needs to be resolved within the broader 800 series work items status category. | **DISPLAY** slide  “800 Series Work Items Claim Labels”  **EXPLAIN** the following:   * Each 800 series work item status category has additional subcategories called claim labels. * Claim labels specify the issue that needs to be resolved within the broader 800 series work items status category.   This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK trainees whether they have any questions about 800 series work items claims labels.** |
| 810 Series Work Items (Notice of Benefit Payment Transaction)  A blue label tag with phrase 810 Claim Labels   * 603 * 605/606 and 611 * 607 * 626 * 634 | **DISPLAY** slide  “810 Series Work Items (Notice of Benefit Payment Transaction)”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** trainees to M21-4 Appendix B.3.d (810WI Notice of Benefit Payment Transactions) and M21-4 Appendix C, Section 1.b (Index of Claim Labels).  **EXPLAIN that the claim labels shown are more likely to be generated for the 810-status category and will be covered in this lesson, though others also exist as seen in the manual reference.**  Sign with exclamation point  **EMPHASIZE the status category title and the relationship of the claim labels to this status category.** |
| 810-603 Returned Payment Applied to Accts Receivable   * Reason: this work item generates when a claimant has a current debt with VA and a payment was returned to VA, but instead of going to proceeds, it was applied to their debt * Actions:   + In SHARE, look at the Corporate Record>Awards/Rating tab   + Pay Status will probably show Suspended   + In VBMS, check last received address to verify it is the same one on file   An orange label tag with the claim label number 603 | **DISPLAY** slide  “810-603 Returned Payment Applied to Accts Receivable”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** trainees to the *800 Series Work Items Adjustments* section of the **Processing an Award Adjustment** job aid as a resource to follow along with in the discussion of the 810 series work items claim labels.  **EXPLAIN the reason for the work item claim label and the necessary actions to process it.**  **EXPLAIN that if the address is updated by another user or action, perform the PIF Clear Function in Share for the 810-603 work item.**  Sign with exclamation point  **EMPHASIZE that the claimant’s award has not been terminated, but payments are not being sent out. Most likely, the award is suspended.**  **NOTE: This occurs most commonly when the claimant does not have direct deposit and a paper check is returned, but this may also occur when a direct deposit is rejected/returned.** |
| 810-605/606 Payee Deceased – Accrual Segment Established/Increased and 611 Payment Returned Death of Person Entitled (1 of 2)   * Reason: these work items indicate the following:   + That the beneficiary is reported as deceased   + An overpayment was created on the account for monies that were paid after the first of the month of death * Actions: ensure that the beneficiary’s award is terminated.   + If the Award Information screen shows no monies in the Receivables Balance, then Finance has already addressed the issue. Perform PIF Clear Function in SHARE.   An orange label tag with the claim label number 605/606 and 611 | **DISPLAY** slide  “810-605/606 Payee Deceased – Accrual Segment Established/Increased and 611 Payment Returned Death of Person Entitled (1 of 2)”  **EXPLAIN the reason for the work item claim label and the necessary actions to process it.**  Sign with exclamation point  **EMPHASIZE:**   * These 810 work items are often generated with 820 series work items or in this instance with another 810 claim label. * If the award has not yet been terminated, follow the steps for the 820-833 work item to complete this task. |

| PowerPoint Slides | Instructor Activities |
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| **810-605/606 Payee Deceased – Accrual Segment Established/Increased and 611 Payment Returned Death of Person Entitled (2 of 2)**   * + If the Award Information screen shows monies in the Receivables Balance and in Proceeds, then e-mail Finance to apply the Proceeds to the Receivable Balances since the beneficiary is deceased.   + After e-mailing Finance, perform the PIF Clear Function in SHARE.   An orange label tag with the claim label number 605/606 and 611 | **DISPLAY** slide  “810-605/606 Payee Deceased – Accrual Segment Established/Increased and 611 Payment Returned Death of Person Entitled (2 of 2)”  **EXPLAIN** the remaining actions to perform to clear the 810-605/606 and 611 work items. |
| 810-607 Miscellaneous Returned Payment   * Reason: this work item is generated based on an automatic burial payment being returned. * Actions:   + Confirm the beneficiary’s name and address to which the burial payment was sent is correct.   + Correct if needed.   + After updating the address, request the appropriate prescribed form and generate an award to reissue the payment.   + If the beneficiary is not entitled, ask Finance to return the funds to appropriations.   An orange label tag with the claim label number 607 | **DISPLAY** slide  “810-607 Miscellaneous Returned Payment”  **EXPLAIN** the reason for the work item claim label and the necessary actions to process it.  **EXPLAIN** that in the instance that a dependent spouse on record has already died or the spouse and Veteran are now divorced, the beneficiary may no longer be eligible for the benefit.  **EMPHASIZE** that for a returned automatic burial payment, generating an award is usually required along with the appropriate prescribed form, VA Form 21P-530, Application for Burial Benefits.  **EXPLAIN that an automatic MOD payment can be reissued by Finance without requesting the prescribed form.** |
| 810-612 Account Suspended – Undeliverable Payment   * Reason: this generates when an automatic burial or MOD payment is returned/rejected or if a payment issued by the Debt Management Center (DMC) is returned. * Actions:   + Determine whether the payment needs to be reissued or needs to be taken back by VA.   + Verify with an SSA inquiry that the beneficiary is still alive.   + Check the last received address to verify if it is the same as the one that is on the General Information tab of the SHARE Corporate Award Screen.   + CEST an EP to adjust the award. | **DISPLAY** slide  “810-612 Account Suspended – Undeliverable Payment”  **EXPLAIN** the reason for the work item claim label and the necessary actions to process it.  Sign with exclamation point  **EMPHASIZE that to process this work item requires CESTing an EP to complete an award adjustment.**  **EMPHASIZE that if the returned payment caused the beneficiary’s award to go into suspense, generate the award since there is a new address.**  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** to **Processing an Award Adjustment** job aid for detailed steps about the award adjustment steps and decision notice content. |
| 810-626 Paid EFT – Verify Home Address (1 of 2)   * Reason: this work item generates when a direct deposit payment has been returned. * Actions:   + Verify the beneficiary is still alive.   + If unable to verify, look in VBMS to check the last received direct deposit information.   + Compare it to the information listed on the General Information tab of the SHARE Corporate Award Screen.   + If benefits were recently awarded, check the application and compare to SHARE to look for a typing error.   An orange label tag with the claim label number 626 | **DISPLAY** slide  “810-626 Paid EFT – Verify Home Address (1 of 2)”  **EXPLAIN** the reason for the work item claim label and the necessary actions to process it.  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER trainees to M21-1 II.i.2.C.6.k.(Processing 800 Series Work Items Commonly Related to Lack of a Correct Address) and** M21-1 II.i.2.C.6.d. Procedure for Obtaining a Correct Address for Undeliverable Essential Mail)  Sign with exclamation point  **EMPHASIZE** that the PMC VSR may take action only when the new direct deposit/EFT information is received from the beneficiary or discovered in the VA file.   * + **For example, if a notice of new address was not signed by the beneficiary or was flagged from a third party such as social security, the PMC VSR is not yet able to complete the steps to clear this work item.**   **Instead, the PMC VSR should take the first step of requesting the required updated information from the beneficiary and until it was received, the 810 work item would still be pending.** |
| 810-626 Paid EFT – Verify Home Address (2 of 2)   * + If the direct deposit/EFT information is updated by another user or action, perform the PIF Clear Function in SHARE.   + To change a beneficiary's direct deposit/EFT information and prompt the system to resume payments, enter the updated information in the SHARE Change of Address Function   + Confirm updated direct deposit information in SHARE on the General information tab.   An orange label tag with the claim label number 626 | **DISPLAY** slide  “810-626 Paid EFT – Verify Home Address (2 of 2)”  **EXPLAIN** the remaining actions to perform to clear the 810-626 work item. |
| **810-634 Proceeds Established in Participant Record (1 of 2)**   * **Reason: this work item typically generates with an 810-626 Paid EFT – Verify Home Address, indicating that a beneficiary has not received the money (likely because of an incorrect address or 810-626).** * **NOTE: when the 810-634 is a stand-alone item, award action may be needed to pay proceeds, including from a returned MOD payment.** * **Actions:**    + **Identify the reason(s) the payment was returned.**   + **Look at Pay Status field in SHARE.**   An orange label tag with the claim label number 634 | **DISPLAY** slide  “810-634 Proceeds Established in Participant Record (1 of 2)”  **EXPLAIN** that when the 810-634 work item is generated with a 626, it is likely that correcting the address will release the proceeds; in these cases, simply use PIF Clear Function for the 810-634.  Sign with exclamation point  **EMPHASIZE** that when the 810-634 is a stand-alone item, award action may be needed to pay proceeds, including from a returned MOD payment.  **REMIND** trainees that any adjustments to the award must be done under an established EP and not under the 800 series work item. |
| **810-634 Proceeds Established in Participant Record (2 of 2)**   * + **Pay Status will show one of the following entries:**      - **Terminated**     - **Suspended**     - **Authorized**   An orange label tag with the claim label number 634 | **DISPLAY** slide  “810-634 Proceeds Established in Participant Record (2 of 2)”  **EXPLAIN** that when the 810-634 work item is generated with a 626, it is likely that correcting the address will release the proceeds; in these cases, simply use PIF Clear Function for the 810-634.  Sign with exclamation point  **EMPHASIZE** that when the 810-634 is a stand-alone item, award action may be needed to pay proceeds, including from a returned MOD payment.  **REMIND** trainees that any adjustments to the award must be done under an established EP and not under the 800 series work item.  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK trainees whether they have any questions about the specific 810 series work items claim labels before transitioning to the next part of the lesson.**  **TELL trainees that the next part of the lesson will present several demonstrations for some of the 810 series work items followed by a guided practice exercise.** |
| **Demonstration and Guided Practice**   * **Demonstration—Instructor processes a work item from start to finish with opportunities for questions.** * **Guided Practice—Trainees process a claim with questions and feedback/remediation.** | **DISPLAY** slide  “Demonstration and Guided Practice”  **TELL trainees the remainder of the lesson presents instructor demonstrations and a guided practice exercise.**  **EXPLAIN that later 800 series work items lessons will follow a similar format.**  **EXPLAIN that the purpose of Demonstration 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.**  **EXPLAIN that the purpose of the Guided Practice 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.** |
| **Step By Step Guide - 810: 611 Work Item**   * A PMC VSR, receives an 810: 611 Payment Returned Death of Person Entitled work item to her work queue for Surviving Spouse Angela. * The PMC VSR recognizes that the work item may be due to the death of the Surviving Spouse. * The PMC VSR reviews the corporate record and determines the Surviving Spouse’s award has been suspended due to a returned check and no action has been completed to terminate based on her death. * The PMC VSR then pulls an SSA SHARE print to review for the Surviving Spouse’s date of death. The SHARE print verifies that the Surviving Spouse passed away June 18, 2017. * The PMC VSR clears the 810-611 work item and CESTs an EP 130 PMC Report of Death of Beneficiary (if one is not already pending). * The PMC VSR then inputs the appropriate date of death into VBMS to terminate the Surviving Spouse’s award. * The PMC VSR creates an estate letter to inform the estate of the terminated award based on the death of the Surviving Spouse and submits the pending claim to the Authorizer. | **DISPLAY** slide  **& 18.** “**Step by Step - 810: 611 Work Item”**  **INTRODUCE** Each step listed on how to process an 810: 611 Payment Returned Death of Person Entitled work item.  **REMIND** trainees that there are additional ways the VA receives, and processes notice of death terminations. There are times when a work item is received, and no action is necessary other than to clear the work item.  **REMIND trainees that you will demonstrate how to process an 810 series work item from start to finish. Trainees should write their questions down and ask at the conclusion of the demonstration.**  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** trainees to the **Processing an Award Adjustment** job aid as resource for steps to take to process an 800 series work item. |
| ****Demonstration Example 1— Determine Which 800 Series Work Item Was Received****  Indicates a demonstration should be performed | **DISPLAY** slide **19.** “Demonstration Example 1—Determine Which 800 Series Work Item Was Received”  **DISPLAY** the 800 Series Work Item you have prepared for demonstrate for the class.  **EXPLAIN** that a Coach usually will assign a particular work item to the PMC VSR through the National Work Queue.  **SHOW** trainees in the system where the work item messages appear in the Work Queue and SHARE.  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to the Processing an Award Adjustment** job aid as needed.  Indicates a demonstration should be performed  **DEMONSTRATE, using Example 1, how a PMC VSR would determine which 800 series work item was received.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if trainees have any questions about the determining which 800 series work item was received.** |
| ****Demonstration Example 1— Determine the Reason for the Work Item****   * **Work item was not cleared previously, but no update is needed** * **An update is needed in the system** * **An award adjustment is needed**   Indicates a demonstration should be performed | **DISPLAY** slide **20.** “Demonstration Example 1—Determine the Reason for the Work Item”  **EXPLAIN** the possible reasons for 800 series work items:   * Work item was not cleared previously, but no update is needed * An update is needed in the system * An award adjustment is needed   Indicates a demonstration should be performed  **DEMONSTRATE, using Example 1, how a PMC VSR would determine the reason for the work item.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if they have any questions about determining the reason for the 800 series work item for Example 1.** |
| ****Demonstration Example 1— Determine the Appropriate Steps to Take to Process the 810 Series Work Items****  Indicates a demonstration should be performed | **DISPLAY** slide **21.** “Demonstration Example 1—Determine the Appropriate Steps to Take to Process the 810 Series Work Items”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to** the steps provided in the **Processing an Award Adjustment** job aid.  Indicates a demonstration should be performed  **DEMONSTRATE, using Example 1, how a PMC VSR would determine the appropriate steps to take to process the 810 series work items.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if they have any questions about** determining the appropriate steps to take to process the 810 series work items. |
| ****Demonstration Example 1— Perform the Required Actions to Process an 810 Series Work Item****  Indicates a demonstration should be performed | **DISPLAY** slide **22.** “Demonstration Example 1— Perform the Required Actions to Process an 810 Series Work Item”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to** the steps provided in the **Processing an Award Adjustment** job aid.  Indicates a demonstration should be performed  **DEMONSTRATE, using Example 1, how a PMC VSR would perform the required actions to process the 810 series work items.**  Sign with exclamation point  **EXPLAIN that one of the required actions to process 810 series work items may be creating and sending a decision notice.**  **EMPHASIZE the following for Example 1, as needed:**   * **Which paragraphs to include and why** * **Which template to choose** * **Which autotext to include and how to insert it**   This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if they have any questions about** performing the required actions to process the 810 series work items. |
| ****Demonstration Example 1—Submit the Outcomes of the 810 Series Work Items to the Authorizer****  Indicates a demonstration should be performed | **DISPLAY** slide **23.** “Demonstration Example 1—Submit the Outcomes of the 810 Series Work Items to the Authorizer”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to** the steps provided in the **Processing an Award Adjustment** job aid.  Indicates a demonstration should be performed  **DEMONSTRATE, using Example 1, how a PMC VSR would submit the outcomes of the 810 series work items to the Authorizer through the National Work Queue and save the letter based on local procedures.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if they have any questions about** submitting the outcomes of the 810 series work items to the Authorizer.  Sign with exclamation point  **EXPLAIN that after trainees have processed the work item, they will route the claim to the authorizer and save the letter appropriately. Team leaders will advise the PMC VSRs of local policy when they begin processing work items at their station.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. |
| Questions About Demonstrations?  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. | **DISPLAY** slide **24.** “Questions About Demonstrations?”  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK** if there are any final questions about the Demonstration Examples or anything covered in this lesson before transitioning to the Guided Practice Exercise. |
| Guided Practice Exercise Overview—810 Series Work Items (1 of 2)   * Instructions:   + Process 810 series work item from beginning to end.   + Use the job aids, references, and systems available.   + Select a partner before beginning the exercise to confer with after completing each step individually.   + Consult with instructors for assistance.   + Be prepared to discuss your results with the class.   + Take credit in ASPEN as directed at the completion of the exercise. | **DISPLAY** slide **25.** “Guided Practice Exercise Overview—810 Series Work Items (1 of 2)”  **EXPLAIN** that in this portion of the lesson, trainees will process an 800 series work item from start to finish.  **DIRECT** trainees to select a partner to work with during this exercise:   * 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. * Trainees should be prepared to share their results with the class.   **ENCOURAGE** trainees to consult with the instructors if they need assistance.  **REMIND** instructors to provide direction, but not the outcomes.  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** to *Appendix A* for references and job aids.   * **ENCOURAGE trainees to keep this and all other job aids used during this Guided Practice handy as the trainees will refer to them later in the lesson as they practice processing a claim.** |
| Guided Practice Exercise Overview—810 Series Work Items (2 of 2)   * This exercise includes the following parts of the work items process:   + Determine which 800 series work item was received   + Determine the reason for the work item   + Determine the appropriate steps to take to process an 810 series work item   + Perform the required actions to process an 810 series work item   + Submit the outcomes of the 810 series work item to the Authorizer | **DISPLAY** slide **26.** “Guided Practice Exercise Overview—810 Series Work Items (2 of 2)”  **TELL** trainees that they will now be working through the same steps to process 800 series work items as they viewed in the demonstration but using a different work item. |
| Guided Practice Exercise—810 Series Work Items   * Guided Practice Exercise Example:   + {Work item}   + {Other information} | **DISPLAY** slide **27.** “Guided Practice Exercise—810 Series Work Items”  **INTRODUCE** Guided Practice Exercise Example.  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER** to *Appendix A* for references and job aids.  **SELECT** a trainee to read the Example information on the slide. |
| ****Guided Practice Exercise— Determine Which 800 Series Work Item Was Received****   * Instructions:   + Determine which 800 series work item was received.   + Confer with your partner.   + Be prepared to discuss your results with the class.   Time allowed: 5 minutes | **DISPLAY** slide **28.** “Guided Practice Exercise— Determine Which 800 Series Work Item Was Received”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to the steps provided in the Processing an Award Adjustment** job aid.  **DIRECT trainees to the Guided Practice Exercise Example.**  **DIRECT trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.**  **ASSIST 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.**  **SELECT a trainee to share a description of claim label for the Exercise Example work item.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if trainees have any questions about determining which 800 series work item was received.**  **DISCUSS** answers to the trainees’ questions. |
| ****Guided Practice Exercise—Determine the Reason for the Work Item****   * Instructions:   + Determine the reason for the work item.   + Confer with your partner.   + Be prepared to discuss your results with the class.   Time allowed: 15 minutes | **DISPLAY** slide **29.** “Guided Practice Exercise— Determine the Reason for the Work Item”  **DIRECT trainees to Guided Practice Exercise Example.**  **DIRECT trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.**  **ASSIST 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.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK why it is important to determine the reason for the work item.**  **ASK if trainees have any questions about the reason for the Exercise Example work item.**  **PROVIDE feedback and remediation as necessary.** |
| ****Guided Practice Exercise— Determine the Appropriate Steps to Take to Process the 810 Series Work Item****   * Instructions:   + Determine the steps to take to process the 810 series work item.   + Use the job aids, references, and systems available.   + Confer with your partner.   + Be prepared to discuss your results with the class.   Time allowed: 20 minutes | **DISPLAY** slide **30.** “Guided Practice Exercise—Determine the Appropriate Steps to Take to Process the 810 Series Work Item”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to the steps provided in the Processing an Award Adjustment** job aid.  **NOTE:** Previous lessons provided training on parts or all of this step. *Appendix A* 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:   * Determine dependency eligibility for a spouse of a Veteran * Determine award adjustment based on change in dependency   **DIRECT trainees to the Guided Practice Exercise Example.**  **DIRECT trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.**  **ASSIST 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.**  **SELECT a trainee to share the steps they have determined to take to process the Exercise Example work item.**  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if trainees have any questions about determining the appropriate steps to take to process the 810 series work item.**  **DISCUSS** answers to the trainees’ questions. |
| ****Guided Practice Exercise— Perform the Required Actions to Process an 810 Series Work Item****   * Instructions:   + Perform the required actions to process the specific claim label for the 810 series work item.   + Use the job aids, references, and systems available.   + Confer with your partner to assess each other’s steps to process the work item.   + Ask for guidance from the instructor if you identify discrepancies.   + Time allowed: 40 minutes | **DISPLAY** slide **31.** “Guided Practice Exercise—Perform the Required Actions to Process an 810 Series Work Item”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to the steps provided in the Processing an Award Adjustment** job aid.  **NOTE:** Previous lessons provided training on parts or all of this step. *Appendix A* 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:   * Establish a claim (CEST) * Describe how to prepare an award action * Create a decision notice   **DIRECT trainees to the Guided Practice Exercise Example.**  **DIRECT trainees to perform this step individually before comparing their outcome with a partner. Trainees should be prepared to share their answers with the class.**  **ASSIST 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.**  **SELECT a trainee to share the steps they have performed to process the Exercise Example work item.**  **ASSIST trainees as necessary with creating a decision notice if required:**   * **Which paragraphs to include and why** * **Which template to choose** * **Which autotext to include and how to insert it**   **PROVIDE** feedback and remediation as needed.  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if trainees have any questions about performing the required actions to process the 810 series work item.**  **DISCUSS** answers to the trainees’ questions. |
| ****Guided Practice Exercise—Submit the Outcomes of the 810 Series Work Item to the Authorizer****   * Instructions:   + Finalize notes for work items and save completed work in appropriate locations for review by Authorizer.   + Use the job aids, references, and systems available.   Time allowed: 10 minutes | **DISPLAY** slide **32.** “Guided Practice Exercise—Submit the Outcomes of the 810 Series Work Item to the Authorizer”  **This icon indicates you should refer trainees to a document or online reference. (e.g., a page in the Trainee Guide or a specific appendix)**  **REFER to the steps provided in the Processing an Award Adjustment** job aid.  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK if they have any questions about submitting the outcomes of the work item to the Authorizer.**  Sign with exclamation point  **REMIND** trainees at the conclusion of the exercise to take credit in ASPEN based on their local policy. |
| ****Questions?****  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction. | **DISPLAY** slide **33.** “Questions?”  This icon prompts you to ask trainees a discussion question or to ask trainees if they have any questions before proceeding with instruction.  **ASK** if there are any final questions about the Guided Practice Exercise or anything covered in this lesson. |
| Lesson Summary   * What is an 800 series work item? * What are the main tasks a PMC VSR must accomplish to process 810 series work items? | **DISPLAY** slide **34.** “Lesson Summary”  **REVIEW** themain objective of this lesson: **to differentiate 800 series work items and** to process 810 series work items.  **ALLOW trainees five minutes to review and answer the questions.**  **PROVIDE the following answers as listed on the slide:**  ***What is an 800 series work item?***   * ***An 800 series work item is a system-generated message designed to assist (VSCs) and (PMCs) in identifying and tracking cases that require follow-up action. Each 800 series work item has a descriptive claim label indicating the nature of the review required.*** * ***An 800 series work item may be generated as a result of maturation of a diary or other system triggers such as benefit details, returned payments, or data related to dependents.***   ***What are the main tasks a PMC VSR must accomplish to process 810 series work items?***   * ***Determine which 800 series work item was received.*** * ***Determine the reason for the work item.*** * ***Determine the appropriate steps to take to process an 810 series work item.*** * ***Perform the required actions to process an 810 series work item.*** * ***Submit the outcomes of the 810* series work item to the Authorizer.** |
| What’s Next?   * + **Complete the Process 810 Series Work Items course evaluation TMS ID #4408410** | **DISPLAY** slide **35.** “What’s Next?”  **DIRECT** trainees to complete the Process 810 Series Work Items course evaluation **TMS ID #4408410** |