

ELIGIBLE FOR DIRECT PAY NON-ATTORNEY (EDPNA) PRACTICE EXAM (SAMPLE)

STUDY GUIDE



SAMPLE STUDY GUIDE WITH LIMITED QUESTIONS

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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 – 45 minutes). Review a handful of questions, reflect on the explanations.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!

Questions

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- 1. What is the primary role of a Non-Attorney in the EDPNA context?**
 - A. To represent clients in legal matters
 - B. To assist clients with claims for direct payment without legal representation
 - C. To provide free legal services to all clients
 - D. To conduct legal research for attorneys
- 2. Which form does a business use to report income?**
 - A. Form 1040
 - B. Form 1065
 - C. Form 1120
 - D. Both Form 1120 and Form 1065
- 3. Can you charge a claimant for out of pocket expenses after an unfavorable decision?**
 - A. Yes, it is allowed
 - B. No, it's not allowed
 - C. Only if previously agreed
 - D. Only for medical record fees
- 4. What is the significance of the tax filing deadline?**
 - A. It allows taxpayers to file without needing any proof of income
 - B. It defines the last day taxpayers can submit their returns without incurring late fees
 - C. It is the earliest date for a tax refund
 - D. It is a guideline for estimating future taxes
- 5. What describes the "reconsideration" process in the disability claim process?**
 - A. A review of a denied claim by the SSA to determine if the decision should be upheld or reversed
 - B. An initial assessment of the claim's validity
 - C. A process for appealing approved claims
 - D. A required step before receiving benefits

- 6. What is a significant aspect of the EDPNA exam's structure?**
- A. It includes practical case studies
 - B. It is exclusively online
 - C. It offers a flexible testing schedule
 - D. It typically consists of two knowledge sections
- 7. What criteria must Susan meet to be eligible for DAC benefits?**
- A. Be married and under 22 years old
 - B. Unmarried, disabled before age 22, have a work record
 - C. Unmarried, disabled before age 22, no work record
 - D. Be under 18 years old and disabled
- 8. When discussing the review process, what should representatives make clear to their clients?**
- A. All reviews will result in a positive change
 - B. Outcomes and timelines can vary significantly
 - C. Clients should avoid asking questions during the review
 - D. Only negative outcomes should be communicated
- 9. What resource should candidates become familiar with for the EDPNA exam?**
- A. The Taxpayer Advocate Service
 - B. The Internal Revenue Code (IRC)
 - C. The Social Security Administration
 - D. The Federal Reserve
- 10. What role does a "vocational expert" play in the claims process?**
- A. They evaluate the claimant's medical history
 - B. They provide opinions about the claimant's ability to work given their disabilities
 - C. They assist with filling out claims forms
 - D. They are responsible for legal representation in hearings

Answers

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1. B
2. D
3. A
4. B
5. A
6. D
7. C
8. B
9. B
10. B

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Explanations

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1. What is the primary role of a Non-Attorney in the EDPNA context?

- A. To represent clients in legal matters
- B. To assist clients with claims for direct payment without legal representation**
- C. To provide free legal services to all clients
- D. To conduct legal research for attorneys

In the context of the Eligible for Direct Pay Non-Attorney (EDPNA) framework, the primary role of a Non-Attorney is to assist clients with claims for direct payment without legal representation. This role focuses on facilitating the process for individuals seeking to navigate claims independently and ensures that clients have support in understanding and meeting the requirements for direct payment claims. The emphasis is on non-legal representation, meaning that while these individuals can provide valuable assistance, they do not engage in full legal representation or give legal advice that would typically be reserved for licensed attorneys. Their role is crucial in empowering clients to manage their own claims, thereby maintaining a level of accessibility and support for those who may not have the resources or need for an attorney's services.

2. Which form does a business use to report income?

- A. Form 1040
- B. Form 1065
- C. Form 1120
- D. Both Form 1120 and Form 1065**

A business reports its income using specific tax forms based on its structure and type. Form 1120 is used by corporations to report their income, gains, losses, deductions, and credits, while Form 1065 is utilized by partnerships to report their income, deductions, gains, and losses, as well as to provide each partner with the necessary information to report income on their individual returns. Selecting both Form 1120 and Form 1065 acknowledges that different types of businesses—corporations and partnerships—each have their own designated forms for reporting income. Thus, the inclusion of both forms accurately reflects the diverse types of business entities and their reporting obligations. This highlights the importance of understanding the nature of the business entity in determining the correct form for income reporting.

3. Can you charge a claimant for out of pocket expenses after an unfavorable decision?

- A. Yes, it is allowed**
- B. No, it's not allowed
- C. Only if previously agreed
- D. Only for medical record fees

Charging a claimant for out-of-pocket expenses after an unfavorable decision is permissible under specific circumstances. Generally, the guidelines within the context of non-attorney representation suggest that if there was a prior agreement regarding the fees or costs associated with the claim, these can be enforced. This means that if the claimant was made fully aware of the potential costs that could arise during the process—including out-of-pocket expenses—they may be charged for these costs, as long as it is clearly stated and agreed upon beforehand. This includes expenses that are not part of the typical fees associated with the case but are necessary for the representation. Hence, in scenarios where the representation included transparency about potential expenses, the option to charge the claimant stands valid, allowing for a reasonable recovery of those costs. Moreover, expenses related to obtaining necessary documents or other costs incurred directly in preparing for a case may also contribute to the overall understanding of what can be charged. However, charges must be transparent and compliant with established agreements between the representative and the claimant.

4. What is the significance of the tax filing deadline?

- A. It allows taxpayers to file without needing any proof of income
- B. It defines the last day taxpayers can submit their returns without incurring late fees**
- C. It is the earliest date for a tax refund
- D. It is a guideline for estimating future taxes

The significance of the tax filing deadline primarily revolves around it marking the last day that taxpayers can submit their tax returns without incurring late fees or penalties. Missing this deadline means that individuals may face additional financial repercussions, such as interest on any unpaid taxes and potential fines for late filing. Timely filing helps ensure that the taxpayer remains compliant with tax laws and avoids unnecessary costs. While there are mechanisms for extensions or special circumstances that may apply, the standard rule holds that submissions after the deadline typically lead to financial penalties. The filing deadline directly influences not only the individual's financial situation but also affects larger tax administration processes. Other choices, while they may touch on related aspects of tax filing, do not encapsulate the primary significance of the deadline itself. Filing without proof of income isn't correct since taxpayers are generally required to provide accurate income documentation when submitting their returns. The earliest date for a tax refund isn't accurate; refunds can only be issued after a return is filed and processed, which is not defined by the filing deadline. Lastly, using the deadline as a guideline for estimating future taxes does not capture its primary role in ensuring compliance and avoiding penalties for the current tax year.

5. What describes the "reconsideration" process in the disability claim process?

- A. A review of a denied claim by the SSA to determine if the decision should be upheld or reversed**
- B. An initial assessment of the claim's validity
- C. A process for appealing approved claims
- D. A required step before receiving benefits

The "reconsideration" process involves a thorough review of a disability claim that has previously been denied by the Social Security Administration (SSA). During this stage, the SSA reassesses the evidence and information related to the claim to determine if the initial decision should remain as is or be overturned in favor of the claimant. This step is crucial for those who believe their claim was unjustly denied because it provides an opportunity for a fresh examination of the case without starting the extensive appeals process. In contrast, the other options describe different aspects of the disability claim process. The initial assessment of a claim's validity relates to the initial decision-making process rather than a review of a denied claim. The process for appealing approved claims does not apply to reconsideration, as it deals with cases where benefits have already been granted, which typically involve different appeal mechanisms. Finally, reconsideration is not considered a required step before receiving benefits; it specifically pertains to claims that have been denied and the claimant wishes to contest the decision.

6. What is a significant aspect of the EDPNA exam's structure?

- A. It includes practical case studies
- B. It is exclusively online
- C. It offers a flexible testing schedule
- D. It typically consists of two knowledge sections**

The structure of the EDPNA exam is designed to effectively assess candidates' knowledge and skills in two distinct areas, hence the significance of having two knowledge sections. This format allows for a comprehensive evaluation of a candidate's understanding of essential concepts and practices related to the role of a non-attorney representative. Having two sections ensures that the exam covers a broad spectrum of knowledge necessary to succeed in this field. Each section may focus on different aspects of regulatory compliance, case management, or other pertinent areas, providing a well-rounded assessment of a candidate's qualifications. In contrast, the other aspects mentioned in the options may vary in significance or structure but do not capture the comprehensive nature of the exam as effectively as the dual knowledge sections. For instance, while practical case studies can be valuable, the core evaluative structure relies more heavily on knowledge assessment. Similarly, the exam format may be online, but its effectiveness is in how it segments knowledge testing. The flexibility in scheduling can also enhance the test-taking experience, but it is secondary to the core function of the exam structure itself.

7. What criteria must Susan meet to be eligible for DAC benefits?

- A. Be married and under 22 years old
- B. Unmarried, disabled before age 22, have a work record
- C. Unmarried, disabled before age 22, no work record**
- D. Be under 18 years old and disabled

To qualify for Disabled Adult Child (DAC) benefits, an individual must meet specific criteria set by the Social Security Administration. The correct answer outlines that the applicant must be unmarried, have a disability that occurred before the age of 22, and not be required to have a work record. Being unmarried is essential because DAC benefits are intended for children of disabled or deceased workers who are no longer able to rely on their parents' earnings. The requirement that the disability must have occurred before turning 22 ensures that the benefits are aimed at those who need support due to the long-term impact of their disability from a young age. Additionally, while many benefits hinge on a work record, the rules for DAC benefits allow for situations where a disabled adult child has not yet established a work history, thereby enabling those who fall into this category to receive assistance. The other options present various criteria that do not fully comply with the requirements for DAC eligibility, such as the need to be under a certain age or a certain marital status that is not applicable, or including a work record that is not a necessity in this specific context. Therefore, the correct response encapsulates the essential requirements for DAC benefits.

8. When discussing the review process, what should representatives make clear to their clients?

- A. All reviews will result in a positive change
- B. Outcomes and timelines can vary significantly**
- C. Clients should avoid asking questions during the review
- D. Only negative outcomes should be communicated

It's important for representatives to convey to their clients that outcomes and timelines can vary significantly during the review process. This understanding is crucial because each case is unique and influenced by numerous factors such as the specifics of the situation, the data provided, and the complexities of the review itself. By communicating that variability is a natural part of the process, clients can set realistic expectations about the potential outcomes and timelines. This can help alleviate frustration or disappointment if results are not as anticipated and fosters trust and open communication between the representative and the client. Addressing the options that are not correct, stating that all reviews will result in a positive change is misleading, as not every case leads to favorable results. Advising clients to avoid asking questions undermines their ability to stay informed and engaged in their case. Lastly, conveying that only negative outcomes should be communicated is not comprehensive; clients need to be made aware of all potential outcomes for a balanced perspective.

9. What resource should candidates become familiar with for the EDPNA exam?

- A. The Taxpayer Advocate Service
- B. The Internal Revenue Code (IRC)**
- C. The Social Security Administration
- D. The Federal Reserve

Becoming familiar with the Internal Revenue Code (IRC) is essential for candidates preparing for the EDPNA exam. The IRC serves as the fundamental body of laws governing federal taxation and provides the regulatory framework necessary for understanding tax policies, procedures, and obligations. Knowledge of the IRC allows candidates to navigate complex tax issues, apply relevant tax laws, and provide accurate information and assistance to clients. Since the EDPNA role involves aiding clients in tax-related matters, a thorough understanding of the IRC is crucial for success. While resources like the Taxpayer Advocate Service can offer insights on taxpayer rights and advocacy, and the Social Security Administration relates to social security benefits, neither of these is directly relevant to the primary focus of tax administration that the EDPNA role entails. The Federal Reserve oversees monetary policy but does not play a direct role in taxation or the specific responsibilities of EDPNA practitioners. Therefore, the Internal Revenue Code is the key resource candidates should prioritize while preparing for the exam.

10. What role does a "vocational expert" play in the claims process?

- A. They evaluate the claimant's medical history
- B. They provide opinions about the claimant's ability to work given their disabilities**
- C. They assist with filling out claims forms
- D. They are responsible for legal representation in hearings

A vocational expert plays a crucial role in the claims process by offering specialized insights into a claimant's ability to work in light of their disabilities. This professional assesses various factors, including the claimant's medical impairments, skills, education, and work experience, to determine what types of employment they may be able to perform despite their limitations. The vocational expert's opinion often carries significant weight, as they provide an objective analysis of the job market and the individual's capabilities. This can greatly influence the outcome of a claim by helping adjudicators understand how a claimant's disabilities affect their earning potential and ability to obtain and maintain employment. In contrast to the responsibilities of a vocational expert, other roles mentioned, such as evaluating medical history, assisting with claims forms, or providing legal representation in hearings, fall outside the scope of their expertise. These tasks are typically handled by medical professionals, administrative staff, or attorneys rather than vocational experts.

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Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

<https://edpna.examzify.com>

We wish you the very best on your exam journey. You've got this!

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